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Notices

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Note: To improve the content readability, the above product is referred to as Oracle Revenue Management and Billing throughout this document.

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About this Document

This document lists and describes various features in Oracle Revenue Management and Billing which can be used in the health insurance domain. It describes all screens related to these features and explains how to perform various tasks through these screens.

Intended Audience

This document is intended for the following audience:

- End-users
- System Administrators
- Consulting Team
- Implementation Team
- Development Team

Organization of the Document

Each insurance feature is described in a separate chapter in this document. All screens related to the feature and tasks related to the screen are explained in each chapter. This document contains the following chapters:

Chapter Number	Chapter Name	Chapter Description
Chapter 1	Leveraging User Experience Features	Describes various features that enhance the user experience.
Chapter 2	Fully-Insured Group Customer Management	Explains how to create customers and accounts for billing the fully-insured group health plans.
Chapter 3	Self-Funded Customer Management	Explains how to create customers and accounts for billing the self-funded plans.
Chapter 4	Health Insurance Business Management	Describes how to setup the pricing and billing engines for the following three lines of health insurance business - **Fully-Insured Group Health Insurance**, **Self-Funded Group Health Insurance**, and **Individual Health Insurance**.
Chapter 5	Fully-Insured Group Health Insurance	Explains how to design the pricing and billing models for the fully-insured group health insurance business in ORMB. It also explains how to create policies, plans, and memberships for the fully-insured group health insurance.
Chapter 6	Self-Funded Group Health Insurance	Explains how to design the pricing and billing models for the self-funded group health insurance business in ORMB. It also explains how to create policies for the self-funded group health insurance.
Chapter 7	Individual Health Insurance	Explains how to design the pricing and billing models for the individual health insurance business in ORMB. It also explains how to create health products, plans, and memberships for the individual health insurance.
Chapter 8	Customer Registration	Describes how to create a person, account, policy, and policy plan through a customer registration object.

Chapter Number	Chapter Name	Chapter Description
Chapter 9	Customer 360° View	Explains how to view in-depth information about the person, account, or policy in the **Customer 360° View** screen. It explains how to create sort records for bill groups and derivation and pricing parameters for bill groups. It explains how to view the pricing rules of a parent customer and the pricing rules defined for a policy of a bill group. It also explains how to define, edit, and delete the different types of pricing rules of a parent customer and bill group. In addition, it explains how to view the detailed information about the bill.
Chapter 10	Health Product 360° View	Explains how to view in-depth information about the health product or health plan in the **Health Product 360° View** screen.
Chapter 11	Pricing Management	Explains the different concepts of the pricing model supported in the application. It explains how to define a parameter, price item, price list, and tiering criterion. It also explains how to define pricing for a price item, how to assign a price item to a price list, and how to assign a price list to a person or account.
Chapter 12	Division	Describes the different types of division. It also explains how to define a division.
Chapter 13	Approval Workflow	Describes the approval workflow process and explains how to perform various tasks involved in the process. It explains how to implement the approval workflow process for an entity, such as account, person, and so on. It explains how to define an approval workflow group, approval workflow chain, approval workflow criterion type, approval workflow group chain linkage, approval workflow reasons, and approval workflow settings.
Chapter 14	Rules Engine	Describes how the rules engine function. It explains how to define, execute, and maintain business rules separately from the application code.
Chapter 15	Alternate Sequential Bill Numbers	Explains how to generate alternate sequential bill numbers which are either unique throughout the system or within the division.
Chapter 16	Transaction Feed Management	Describes the transaction feed management process and its sub-processes. It explains how to execute each sub-process. It also explains how to view the details of various transactions uploaded in the system. In addition, it explains how to create a transaction source, transaction record type, transaction aggregation rule, aggregation schedule, and disaggregation request.
Chapter 17	Upload Validated Payment Data	Explains how to upload and validate the payment records before you move them to the staging area. It also explains how to create payment events and payments using the validated payment records.
Chapter 18	Freeze Payments on Notification	Explains how the system freezes or cancels the automatic payments, voids the refund requests and cancels the refund

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Chapter Number	Chapter Name	Chapter Description
		adjustments when the review comments are received from the auto clearing house.
Chapter 19	Trial Billing	Explains how to generate trial bills before the actual bill is generated for an account. It also explains how to view the trial bills in the system.
Chapter 20	GL Account Validation	Explains how to enable the static or dynamic GL account validation feature.
Chapter 21	Upload Validated Adjustment Data	Explains how to validate and upload an adjustment data file and create adjustments through an adjustment upload request.
Chapter 22	Payment Request	Explains how to create or transfer payments through a payment request.
Chapter 23	Account Receivable Central	Explains how to use the **Account Receivable Central** screen to search for a bill which you need to offset against another bill. It explains how to perform single, mass, and cross currency offset against one or more bills. It also enables you to create a hold request, refund request, write off request, and dispute request through this screen.
Chapter 24	Offset Request	Explains how to offset the bill's outstanding amount against one or more bills through an offset request. It explains how to create the offset request types and offset requests in the system.
Chapter 25	Funding Request	Describes how to change the automatic payment amount through the funding process. It explains how to create the funding request types and funding requests in the system.
Chapter 26	Refund/Write Off Request	Describes how to refund a payment or credit bill or bill line item and write off a debit bill or bill line item through a refund or write off request, respectively. It explains how to create the refund or write off request types and refund or write off requests in the system.
Chapter 27	Hold Request	Describes how to hold some processes and/or bills at the account or person level for a time period through a hold request. It explains how to create the hold request types and hold requests in the system.
Chapter 28	Delinquency Central	Explains how to track the overdue processes of a delinquent account through the **Delinquency Central** screen. It also explains how to create a hold request, payment arrangement, and promise to pay for a delinquent account from this screen.
Chapter 29	Upload Request	Explains how to do the following through an upload request: • Update bill cycle of accounts • Update contract riders in contracts • Create hold requests, refund requests, write off requests, or billable charges • Reinstate the policies • Create sort records for bill groups • Create derivation and pricing parameters for bill groups

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Chapter Number	Chapter Name	Chapter Description
Chapter 30	General Ledger (GL) Accounting Template	Describes how to override the distribution code used for creating FT GL entries using the **GL Accounting Template** feature. It explains how to create the GL accounting templates for each process and sub processes combination.
Chapter 31	Payment Agreement Request	Describes how to schedule payments in installments for a set of unpaid bills of an account through a payment agreement request. It explains how to create the payment agreement request types and payment agreement requests in the system.
Chapter 32	Inbound Message	Explains how to create the customer and membership inbound messages through the web services. It explains the XML format in which the customer and membership data should be available while calling the respective web service. It also explains how to create the inbound message types and how to process the inbound messages in the system.
Chapter 33	Upload Lockbox Payment and Remittance Advices	Explains how to upload lockbox payment and remittance advices received in the **Electronic Data Exchange (EDI) 820** format. It also explains the format in which EDI 820 flat file should be uploaded in the system.
Chapter 34	Deferred Revenue Recognition	Describes how to recognize the deferred revenue in the system. It explains how to create a deferred revenue recognition template for each distribution code and contract type combination. It also explains how to generate the schedule for a deferred revenue recognition. In addition, it explains how to edit the deferred revenue recognition schedule.
Chapter 35	Reconciliation	Describes how to reconcile pay instructions received from the external system against the bill segments based on the account identifier, policy number, plan number, member identifier, and coverage period combination. It explains the CSV and EDI 820 file formats in which you can upload the pay instructions. It also explains how to create reconciliation types, reconciliations, discrepancy report types, and discrepancy reports in the system.
Chapter 36	Self-Funded Pricing	Explains how to create the following in the system: • Claim, Specific Stop-Loss, Aggregate Stop-Loss, Retention Type Claim Based, Retention Type Enrollment Based, One-Time Flat Fees, Bill Period Based Recurring Flat Fees, Frequency Based Recurring Flat Fees, Ancillary, Discount, and Level-Funded pricing rule types • Claim, Specific Stop-Loss, Aggregate Stop-Loss, Retention Type Claim Based, Retention Type Enrollment Based, Ancillary, and Level-Funded pricing rules for the parent customers and the policies of the bill groups • One-Time Flat Fees, Bill Period Based Recurring Flat Fees, and Frequency Based Recurring Flat Fees pricing rules for the policies of the bill groups • Discount pricing rules for the parent customers
Chapter 37	Stop-Loss	Explains how to accumulate the specific stop-loss and aggregate stop-loss and create billable charges for them.

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Chapter Number	Chapter Name	Chapter Description
Chapter 38	Self-Funded Billing	Explains the billing process for the self-funded plans.
Chapter 39	Fully-Insured Pricing	Explains how to create the following in the system: • Age Based, Tier Based, and Pass-Through Billable Charge pricing rule types • Age Based and Tier Based pricing rules for the fully-insured group policy plans
Chapter 40	Fully-Insured Billing	Explains how the system creates the fully-insured pass-through billable charges.
Chapter 41	Off-Process Request	Describes how to amend the agreed limits, funds, or calculated amounts of the accumulation products within the policy period through an off-process request. It explains how to create the off-process request types and off-process requests in the system.
Chapter 42	Individual Health Insurance Pricing	Explains how to define the pricing for different services offered in a health plan.
Chapter 43	Individual Health Insurance Billing	Explains how the system calculates premium for an individual using the fully-insured pricing and new born business rules.
Chapter 44	Entity Audit	Explains how to use the entity audit framework to track various actions, such as add, update, and delete for an entity.
Chapter 45	Invoice Request	Describes how to create adhoc regular and trial bills for an account through an invoice request for the fully-insured group and fully-insured individual business. It explains how to create the invoice request types and invoice requests in the system.
Chapter 46	Hold Request Creation, Modification, Release, and View Through Inbound Web Service	Lists various business services using which you can create, edit, and release a hold request and view the details of a hold request.
Chapter 47	Hold Direct Debit Instruction	Describes how to hold a direct debit (i.e. automatic payment) for a bill until the confirmation is received from the customer. It explains how to create the auto pay request types and auto pay requests in the system.
Chapter 48	Garbling Customer Information	Explains how to garble the personal information of a customer, such as the customer name, address, email ID, social security number or any other identifier, birth date, gender, and so on, on receiving the data erasure request from the customer.
Chapter 49	Deleting Inactive Customer or Closed Account Information	Explains how to delete all records of a person or account from the system.
Chapter 50	Automatic Refund	Explains how the automatic refunds are created in the system.
Chapter 51	Payment Distribution	Explains how the system distributes payments against the unpaid bills of the account or statement.
Chapter 52	Mass Payment Transfer	Explains how the system facilitates mass payment transfer using the **File Upload Interface** utility.

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Chapter Number	Chapter Name	Chapter Description
Chapter 53	Reporting	Explains how to create reports in various formats using the Apache FOP (Formatting Objects Processor) framework. It also lists and describes various FOP reports that are shipped with the product.
Chapter 54	Automatic Refund/Write Off	Explains how to automatically refund/write off for an account when a fully-insured group policy or individual membership is terminated.
Chapter 55	Delinquency Management	Explains how to manage delinquency for the individual health care business.
Chapter 56	On Demand Billing	Explains how to generate adhoc bills using the on demand billing process. It explains how to create a file type and file group, how to upload a usage data file, how to generate adhoc bills for a file group, and how to freeze the adhoc bills of a file group.
Chapter 57	Accounts Payable Inbound and Outbound	Describes how to extract the accounts payable (i.e. refund adjustments) in a flat file. You can then share the flat file with an external system (i.e. Accounts Payable Processing System). The external system will then accordingly make the refund payments to the customers as appropriate.
Appendix A	Most Commonly Used Tasks	Lists and describes some of the common tasks that you may perform while using the application.
Appendix B	Administration	Describes how to create UI maps and set various feature configurations in the system.

Conventions

The following conventions are used across this document:

Convention	Meaning
boldface	Boldface indicates graphical user interface elements associated with an action, or terms defined in the text.
italic	Italic indicates a document or book title.
`Monospace`	Monospace indicates information that an end-user needs to enter in the application.

Related Documents

You can refer to the following documents for more information:

Document Name	Description
Oracle Revenue Management and Billing Version 8.1.0.0.0 Release Notes	Lists the new features and enhancements made in this release. It contains high-level information about the supported platforms, framework upgrade, supported upgrades, unsupported integrations, and media pack downloads. It also lists the discontinued features, bug fixes, and known issues in this release.

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Document Name	Description
Oracle Revenue Management and Billing Version 8.1.0.0.0 Release Overview Guide	Describes the new features, enhancements, user interface level changes, and database level changes made in this release. The new features and enhancements are classified under three categories – Generic (which is intended for both domains), Financial Services, and Insurance. It lists and describes enhancements made in the framework. It also encloses the ORMB and OUAF deprecation notices and enables you to access the product documentation.
Oracle Utilities Application Framework Business Process Guide	Explains how to get acquainted with the user interface. It explains the different types of pages or portals that you may come across in the application. It explains how to set the user preferences and how to create, manage, assign, and complete a To Do in the application. It also explains how to submit reports and view historic reports in the application.
Oracle Utilities Application Framework Administrative Guide	Explains the general, security, user, designing, developing, and scripting options available in Oracle Utilities Application Framework (OUAF). It describes the user interface, database, configuration, and reporting tools available in OUAF. In addition, it provides information about the application viewer, how to configure incoming and outgoing messages, and how to integrate Lightweight Directory Access Protocol (LDAP), Oracle Identity Manager (OIM), and Batch Scheduler with Oracle Revenue Management and Billing (ORMB).
Oracle Revenue Management and Billing Business Process Guide	Explains how to maintain the demographic, geographic, and financial objects (i.e. accounts) of a customer. It explains how to manage a customer's bills, payments, adjustments, credits, collections processing, statements and deposits in Oracle Revenue Management and Billing (ORMB). It also describes the financial transactions, case management, sales and marketing functions, rates engine, quotations, loans, how to monitor and execute job streams, and how to manage workflows, notifications and overdue processing. In addition, it explains how to extract the data from the system using an extract template. The features listed and described in this document can be used in both financial services and health insurance domains.
Oracle Revenue Management and Billing Administrative Guide	Explains how to configure various features and functionalities in Oracle Revenue Management and Billing (ORMB). For example, billing, payments, adjustments, financial transactions, credits, collections processing, loans, service credits, background processes, quotations, case management, security, overdue processing, batch scheduler, workflow and notifications, etc. The information available in this document can be used in both financial services and health insurance domains.
Oracle Revenue Management and Billing TFM - Batch Execution Guide	Explains the sequence in which the batches should be executed while performing various tasks in the Transaction Feed Management (TFM) module. It provides detailed information about each TFM batch and its parameters. It also indicates the restart and multi-threading ability of each batch. In addition, it recommends values for various parameters which can be used for tuning batch performance as per the available hardware.
Oracle Revenue Management and Billing Batch Guide	Provides detailed information about various batches which are used in different modules, such as billing, payments, financial transaction,

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Document Name	Description
	pricing management, funding request, offset request, hold request, upload request, inbound message, payment agreement request, accruals, earnings credit rate, ILM, deferred revenue recognition, reconciliation, garbling, repricing, entity audit, statements, etc. It also contains information about the batch parameters and the batch restart and multi-threading abilities.

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Chapter 1

Leveraging User Experience Features

Topics:

- Unified Search Feature
- Enabling Mandatory Field Indicator

This chapter describes how to use the following features that enhance the user experience:

- **Unified Search Feature** - Helps to quickly access the screens by eliminating number of clicks rather than using the navigation menus.
- **Enabling Mandatory Field Indicator** - Helps to identify the fields which are mandatory while defining the respective entity.

Unified Search Feature

The **Search** field in the **Application** toolbar allows you to search for business entities (such as persons and accounts) in addition to the standard search for menu items. For example, you can search for a person using its name or primary identifier and account using its primary identifier. The unified search feature is a simplified version of search that allows you to search for records using free form search text or hint codes. For more complex queries, you may navigate to the corresponding advanced search screens.

You can use the following hints to search for the respective entities:

Hint	Description	Example
/	Used to search for a menu item to navigate directly to the corresponding page or BPA script rather than using the menus to navigate to the desired page or script.	/Customer Registration
n:	Used to search for a customer using the person or customer name. Here, you can specify the percentage (%) symbol as a wildcard character. The customers that meet the search criteria are shown in the drop-down list. Once you select a customer from the list, the **Customer 360° Information** screen appears with the details of the respective customer.	n: james n: leo%do
id:	Used to search for a customer using its primary identifier. Here, you cannot specify the percentage (%) symbol as a wildcard character. The customers that meet the search criteria are shown in the drop-down list. Once you select a customer from the list, the **Customer 360° Information** screen appears with the details of the respective customer.	id: 344234423
aid:	Used to search for an account using its primary identifier. Here, you cannot specify the percentage (%) symbol as a wildcard character. The accounts that meet the search criteria are shown in the drop-down list. Once you select an account from the list, the **Customer 360° Information** screen appears with the details of the respective account.	aid: 0586096368

If you want to search for a person or account using any additional search criteria, you can directly access the **Customer 360° View** screen by clicking the **Advanced Search** link in the **Search** field.

Enabling Mandatory Field Indicator

Until now, the mandatory field indicator (i.e., the Asterisk symbol (*)) was not displayed in the user interfaces. This resulted in bad user experience and increased the lead time to complete a process in the application. Now, to overcome

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these issues, you can configure the system such that mandatory field indicator '*' is displayed for the required fields in the user interface.

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

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

- The **Asterisk** (*) symbol does not appear corresponding to the required fields in the **Search** portals or AWB pop-up windows.
- If a field is required for an algorithm program, the **Asterisk** (*) symbol does not appear corresponding to the respective field.
- The **Asterisk** (*) symbol does not appear corresponding to the required checkboxes whose data is stored as the Boolean value (i.e. True or False) in the database.
- There are some screens where the mandatory field indicator feature is not operational at present. We are working on such screens and it would be fixed in the upcoming releases. You can refer to the 36919824 bug for the list of such screens where the mandatory field indicator is not displayed at present.

Note:

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

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

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Chapter 2

Fully-Insured Group Customer Management

Topics:

- Fully-Insured Entities

A fully-insured group health plan is the traditional way to structure an employer-sponsored health plan. In the fully-insured group health plan, the employer contracts an insurance company to cover the employees and dependents. The employer pays a premium to the insurance carrier. The premium rates are fixed for a year, based on the number of employees enrolled in the plan each month. The monthly premium changes during the year when the number of enrolled employees in the plan changes. The insurance carrier collects the premiums and pays the health insurance claims based on the coverage benefits outlined in the policy. The covered persons (i.e. employees and dependents) are responsible to pay any deductible amounts or co-payments required for covered services under the policy.

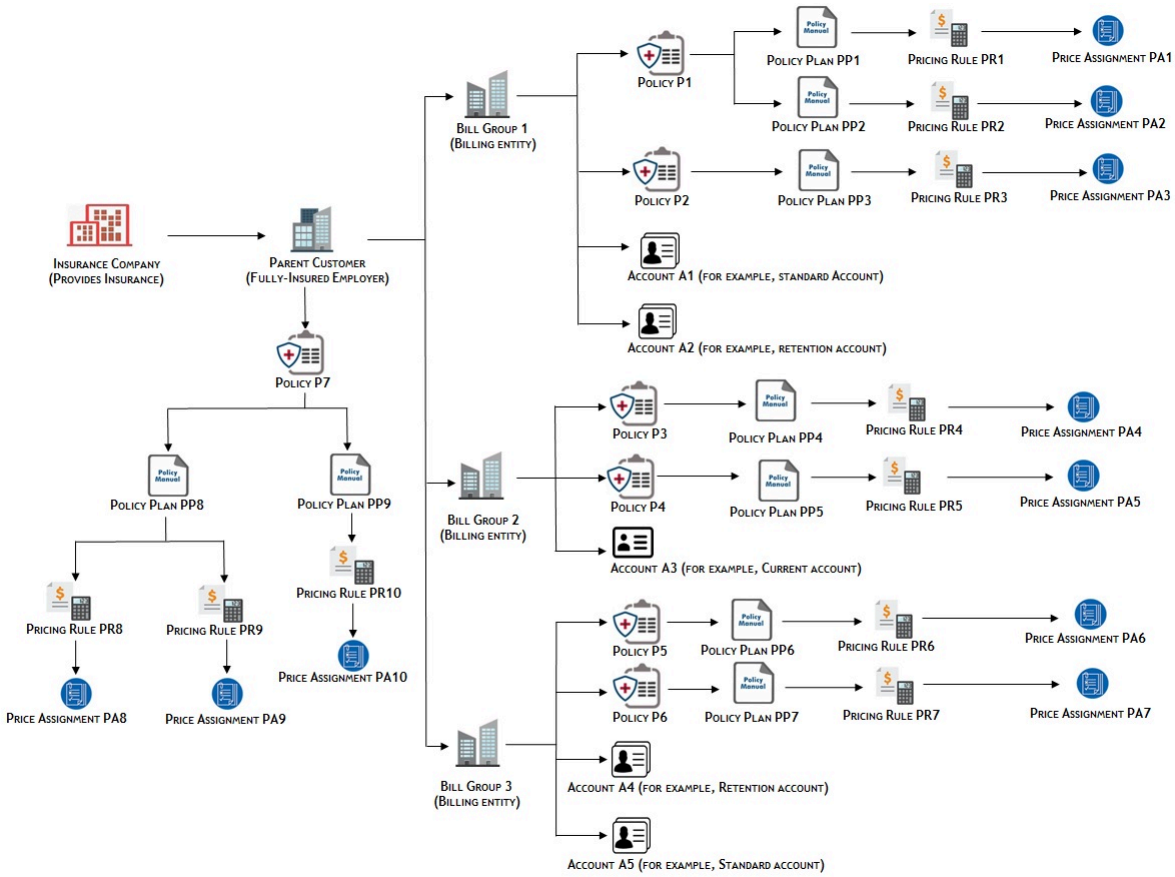
The system enables you to create customers and accounts for the fully-insured group health insurance business. This chapter explains how to create different entities involved in the fully-insured group health insurance business.

Related Topics

For more information on...	See...
Fully-Insured Entities	Fully-Insured Entities on page 6

Fully-Insured Entities

The following figure graphically represents the different entities involved in the fully-insured group health insurance business:



Related Topics

For more information on...	See...
Parent Customer	Parent Customer on page 7
Bill Groups	Bill Groups on page 7
Bill Group's Account	Bill Groups' Account on page 7
Fully-Insured Group Policy	Fully-Insured Group Policy on page 8
Policy Plans	Policy Plans on page 8
Price Items	Price Items on page 9
Pricing Rule Types	Pricing Rule Types on page 9
Pricing Rules	Pricing Rules on page 9
Price Assignments	Price Assignments on page 10

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Parent Customer

The fully-insured employers must be defined as parent customers in the system. You can define a person as the parent customer by setting its person type to **Parent Customer**. You can create a parent customer through a customer registration object or a health care inbound message.

Bill Groups

The system allows you to define one or more bill groups for a parent customer. The membership premium of the employees are billed to a bill group. Each bill group will handle the membership premium of employees based on the employee attributes, such as location, employment status, employment department, and so on. The system allows you to define the derivation and pricing parameters, such as source system, parameter 1, parameter 2, parameter 3, and parameter 4 for a bill group. These parameters are used to derive the bill group against which the membership premium should be billed in the system. You can define a person as the bill group by setting its person type to **Bill Group**. The bill groups should be defined as the child persons of the parent customer (i.e. fully-insured employer) using the relationship type which is specified in the **Person Relationship Type** option type of the **C1-ASOBLLNG** feature configuration. You can create a bill group through a customer registration object or a health care inbound message.

Related Topics

For more information on...	**See...**
Bill Group Derivation and Pricing Parameters	Bill Group Derivation and Pricing Parameters on page 3312
How to setup the **C1-ASOBLLNG** feature configuration	Setting the C1-ASOBLLNG Feature Configuration on page 4417

Bill Groups' Account

The membership premium of employees are billed to the bill group's account. Therefore, every bill group should have at least one account in the system. You can create multiple accounts for a bill group. You can create an account for a bill group through a customer registration object or a health care inbound message.

Depending on the employer's preference, the charges for one or more membership and price item combinations can be billed on the same or different accounts of the bill group. The system enables you to create different types of accounts (such as, MEDCARE1 and MEDCARE2) for a bill group. You can specify the type of account by defining the **Invoice Type (C1INVTYP)** characteristic for the account.

Note: At present, we have not shipped any predefined values for the **Invoice Type (C1INVTYP)** characteristic type. You must define the predefined characteristic values as per the business requirements.

You can also set the priority for an account based on the invoice type while specifying the billing account information for a price item in a pricing rule type. Let us understand this with the help of an example.

The following table illustrates the accounts to which the P1 and P2 price items should be billed based on the given priority:

Price Item	**Priority**	**Invoice Type**	**Account**
P1	10	MEDCARE1	A1
	20	MEDCARE2	A2
P2	10	MEDCARE2	A2
	20	MEDCARE1	A1

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Now, when the effective pricing rule is derived for P1 on the policy plan, the system checks whether an account where the **Invoice Type (C1INVTYP)** characteristic type is set to **MEDCARE1** exists for the bill group. If so, it considers the account (A1) of the bill group for billing. However, if an account where the **Invoice Type (C1INVTYP)** characteristic type is set to **MEDCARE1** does not exist for the bill group, the system checks whether an account where the **Invoice Type (C1INVTYP)** characteristic type is set to **MEDCARE2** exists for the bill group. If so, it considers the account (A2) of the bill group for billing. If an account where the **Invoice Type (C1INVTYP)** characteristic type is set to **MEDCARE2** does not exist for the bill group, the status of the record in the **CI_REPRC_ENTITY_DTL** table is set to **Error (E)**.

Similarly, when the effective pricing rule is derived for P2 on the policy plan, the system considers the account of the bill group which is available based on the priority. The system derives the billing account for only those price items for which the effective pricing rule is derived.

The system searches the account of the bill group based on the priority when the **Invoice Type Characteristic Type** option type of the **C1-ASOBLLNG** feature configuration is set to **C1INVTYP**.

Related Topics

For more information on...	See...
How to setup the **C1-ASOBLLNG** feature configuration	Setting the C1-ASOBLLNG Feature Configuration on page 4417

Fully-Insured Group Policy

You can create a fully-insured group policy using a policy type where the policy category is set to **Fully-Insured Group**. You can create a fully-insured group policy through a customer registration object or a health care inbound message. If the fully-insured group policy information is given for a bill group in a health care inbound message, the system does the following:

- Associates the bill group with the policy using the policy person role which is specified in the **Bill Group Policy Person Role** option type of the **C1-ASOBLLNG** feature configuration
- Associates the parent customer with the policy using the policy person role which is specified in the **Parent Customer Policy Person Role** option type of the **C1-ASOBLLNG** feature configuration

However, if the fully-insured group policy information is given for a parent customer in a health care inbound message, the system does the following:

- Associates the parent customer with the policy using the policy person role which is specified in the **Parent Customer Policy Person Role** option type of the **C1-ASOBLLNG** feature configuration

Note: At present, the **Fully-Insured Individual** policy category is not yet supported in the system.

Policy Plans

A fully-insured group policy may cover various plans for medical, dental, or disability benefits. You can subscriber a person for one or more policy plans within or across policies. The system creates one membership for each person who is subscribed to the policy plan. You can then add dependent members in each membership whenever required.

While creating a policy plan, you need to specify either a price item or at least one pricing rule type. The price item given in the policy plan is used to create a pass-through billable charge for pre-calculated premium amount which is received in an inbound message.

Alternatively, you can associate a pricing rule type with a policy plan. You can only associate a pricing rule type where the pricing rule type category is set to **Age Based**, **Tier Based**, or **Pass-Through Billable Charge**. If you associate an age based pricing rule type with the policy plan, the system creates the SQI based billable charge whenever the membership premium is calculated for eligible members. If you associate a tier based pricing rule type with the policy plan, the system creates the SQI based billable charge whenever the premium is calculated for membership. However,

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if you associate a pass-through billable charge pricing rule type with the policy plan, the system creates an SQI based billable charge using the pass-through billable charge pricing rule type whenever the price item information is given, but the account information is not given in a health care inbound message. Note that if both the price item and account details are given in the billable charge information, the system directly creates the SQI based billable charge for the pre-calculated premium and does not refer the pass-through billable charge pricing rule type which is associated with the policy plan.

Price Items

Each service offered in the fully-insured group health plan should be defined as a price item in the system. You can define a price item from the user interface. You must add the price item in a pricing rule type. The system then enables you to create a pricing rule for a price item using the respective pricing rule type.

Pricing Rule Types

You can create a pricing rule using the respective pricing rule type. The system enables you to create pricing rule types of the following categories for the fully-insured group health plan through a health care inbound message:

Pricing Rule Type	Pricing Rule Type Category	Sample Shipped with the Product
Age Based	Age Based	AGE_BASED
Tier Based	Tier Based	TIER_BASED
Pass-Through Billable Charge	Pass-Through Billable Charge	FI_PASSTBC

Note: You cannot define a pricing rule using a pricing rule type where the pricing rule type category is set to **Pass-Through Billable Charge**.

Pricing Rules

The fully-insured group health plan may offer various services to the employer, such as medical insurance, dental insurance, vision care, life insurance, short-term and long-term disability benefits, and so on. Oracle Revenue Management and Billing enables you to define pricing rules for various services offered in the fully-insured group health plan.

The following table lists the pricing rules which you can define for the following services offered in the fully-insured group health plan:

Service	Pricing Rule	Created for....
Medical Insurance, Dental Insurance, Vision Care, Life Insurance, Short-Term and Long-Term Disability Benefits, etc.	Age Based	Fully-Insured Group Policy Plan
	Tier Based	Fully-Insured Group Policy Plan

You can create the above mentioned pricing rules for the fully-insured group policy plans through a health care inbound message and not from the user interface. The system creates a price assignment for each pricing rule. In the age based pricing rules, you can define different premium fee for employees who belong different age band. You can also offer different premium fee for the employees with the same age band, but with the different set of attributes. The system also enables you to charge additional fee for the eligible member based on certain modifiers. For example, you can charge additional fee when the eligible member is alcoholic and/or consumes tobacco. However, in the tier based pricing rules, you can define different premium fee for employees who belong to different membership tier, such as Employee (E), Employee + Spouse (ES), Employee + Spouse + Children (F), and so on.

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The system searches for the pricing rule of a price item (i.e. service) on the policy plan to which the membership belongs. If the effective pricing rule for a price item is not available on the policy plan, the system does not consider the respective price item for billing.

Price Assignments

The system creates a price assignment for each fully-insured pricing rule. If different premium fee is defined for employees with different set of employee attributes, then the system creates a separate price component for each set of employee attributes. If the modifiers are used in the age based pricing rule, the system creates a price component for each modifier. In the price component, the age band or tier band parameter, the employee attributes, and modifiers are used to define the pricing eligibility criteria. Once the age based or tier based pricing rule is defined for a policy plan, the system creates a price item pricing and price list, and then assigns the price item pricing to the price list.

Chapter 3

Self-Funded Customer Management

Topics:

- Self-Funded Entities

Self-funded health insurance, also known as Administrative Services Only (ASO), is a self insurance arrangement whereby an employer provides health or disability benefits to employees using the company's own funds. In self-funded health plan, employers operate their own health plan. However, in the fully-insured group health plan, the employer contracts an insurance company to cover the employees and dependents. Employers choose to self-insure because it allows them to save the profit margin that an insurance company adds to its premium for a fully-insured group health plan. However, self-insuring exposes the company to much larger risk in the event that more claims than expected must be paid.

Oracle Revenue Management and Billing (ORMB) supports the following types of self-funding approach:

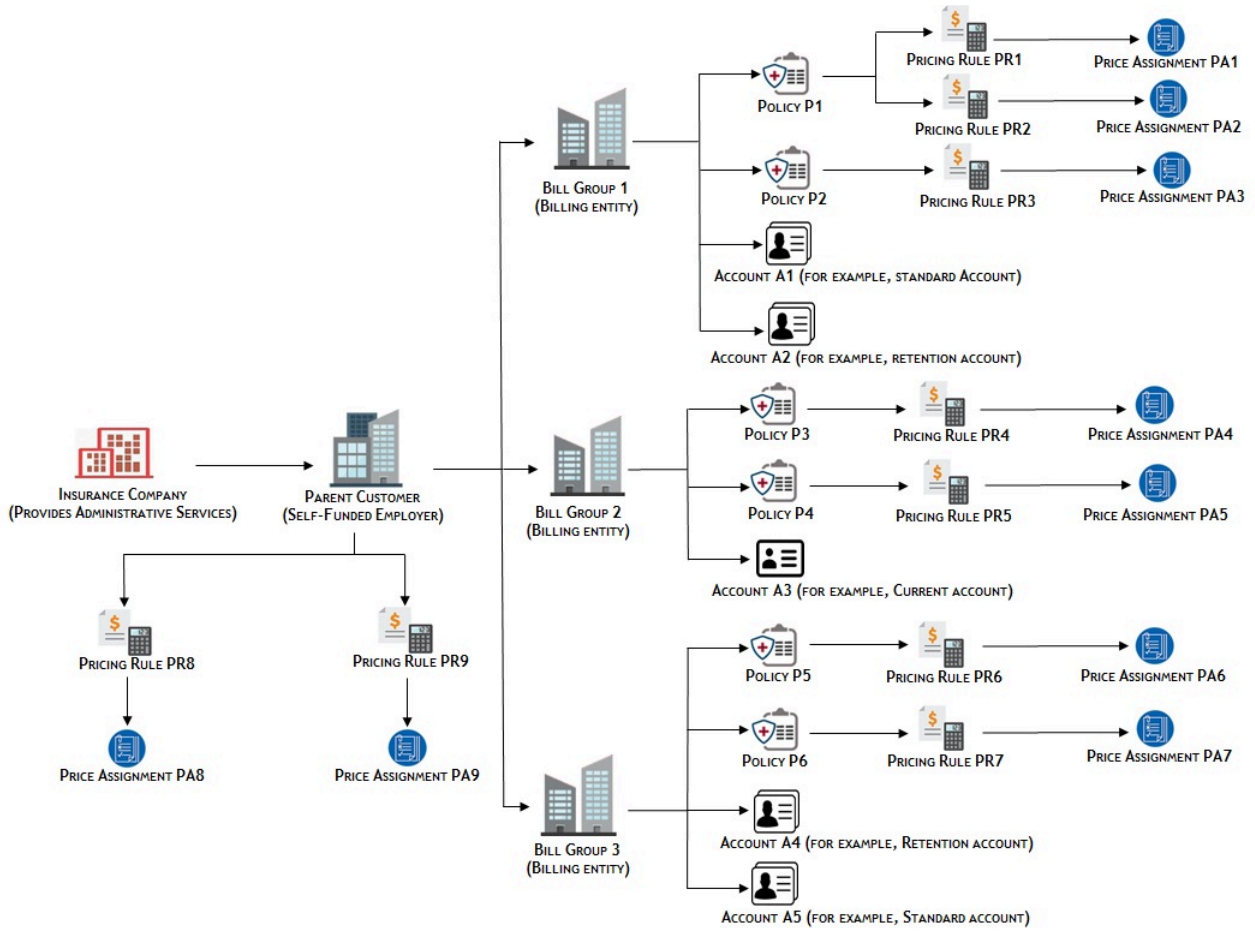
- **Fully Self-Funded** - In the fully self-funded approach, the employer retains all the risk and bears the claim costs irrespective of any limit.
- **Partially Self-Funded** - In the partially self-funded approach, the employer purchases reinsurance or stop loss coverage to pass the risk to insurance company.

The system enables you to create customers and accounts for the self-funded health insurance business. This chapter explains how to create different entities involved in the self-funded health insurance business.

For more information on...	See...
Self-Funded Entities	Self-Funded Entities on page 12

Self-Funded Entities

The following figure graphically represents the different entities involved in the self-funded health insurance business:



For more information on...	See...
Parent Customer	Parent Customer on page 13
Bill Group	Bill Groups on page 13
Bill Group's Account	Bill Group's Account on page 13
Self-Funded Policy	Self-Funded Policy on page 14
Price Items	Price Items on page 14
Pricing Rule Types	Pricing Rule Types on page 14
Pricing Rules	Pricing Rules on page 15
Price Assignments	Price Assignments on page 16

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Parent Customer

The self-funded employers must be defined as parent customers in the system. You can define a person as the parent customer by setting its person type to **Parent Customer**. You can create a parent customer through a customer registration object or a health care inbound message.

Bill Groups

The system allows you to define one or more bill groups for a parent customer. The claim, enrollment, and ancillary transactions of the employees are billed to a bill group. Each bill group will handle the claim, enrollment, and ancillary transactions of employees based on the employee attributes, such as location, employment status, employment department, and so on. The system allows you to define the derivation and pricing parameters, such as source system, parameter 1, parameter 2, parameter 3, and parameter 4 for a bill group. These parameters are used to derive the bill group against which the claim, enrollment, and ancillary charges should be billed in the system. The derived bill group is also used for billing the claim based fees, specific stop-loss credits, aggregate stop-loss credits, discount, and level funding charges.

You can define a person as the bill group by setting its person type to **Bill Group**. The bill groups should be defined as the child persons of the parent customer (i.e. self-funded employer) using the relationship type which is specified in the **Person Relationship Type** option type of the **C1-ASOBLLNG** feature configuration. You can create a bill group through a customer registration object or a health care inbound message.

Related Topics

For more information on...	See...
Bill Group Derivation and Pricing Parameters	Bill Group Derivation and Pricing Parameters on page 3312
How to setup the **C1-ASOBLLNG** feature configuration	Setting the C1-ASOBLLNG Feature Configuration on page 4417

Bill Group's Account

The claim charges, specific stop-loss credits, aggregate stop-loss credits, claim based fees, enrollment based fees, ancillary charges, discount, and level funding charges are billed to the bill group's account. Therefore, every bill group should have at least one account in the system. You can create multiple accounts for a bill group. You can create an account for a bill group through a customer registration object or a health care inbound message.

Depending on the employer's preference, the claim charges, specific stop-loss credits, aggregate stop-loss credits, claim based fees, enrollment based fees, ancillary charges, discount, and level funding charges can be billed on the same or different accounts of the bill group. The system enables you to create different types of accounts (such as, standard and retention) for a bill group. You can specify the type of account by defining the **Invoice Type (C1INVTYP)** characteristic for the account.

Note: At present, we have not shipped any predefined values for the **Invoice Type (C1INVTYP)** characteristic type. You must define the predefined characteristic values as per the business requirements.

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

For example, the following table illustrates the accounts of different types to which the charges of P1 and P2 should be billed based on the given priority:

Price Item	Priority	Invoice Type	Account
	10	Standard	A1

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Price Item	Priority	Invoice Type	Account
	20	Retention	A2
	10	Retention	A2
	20	Standard	A1

Now, when a claim transaction is mapped to P1, the system checks whether an account where the **Invoice Type (C1INVTYP)** characteristic type is set to **Standard** exists for the bill group. If so, it considers the standard account (A1) of the bill group for billing. However, if an account where the **Invoice Type (C1INVTYP)** characteristic type is set to **Standard** does not exist for the bill group, the system checks whether an account where the **Invoice Type (C1INVTYP)** characteristic type is set to **Retention** exists for the bill group. If so, it considers the retention account (A2) of the bill group for billing. If an account where the **Invoice Type (C1INVTYP)** characteristic type is set to **Retention** does not exist for the bill group, the status of the transaction is changed to **Error**.

Similarly, when a claim transaction is mapped to P2, the system considers the account of the bill group which is available based on the priority. The system derives the billing account for only those price items for which the effective pricing rule is derived.

The system searches the account of the bill group based on the priority when the **Invoice Type Characteristic Type** option type of the **C1-ASOBLLNG** feature configuration is set to **C1INVTYP**.

Related Topics

For more information on...	See...
How to setup the **C1-ASOBLLNG** feature configuration	Setting the C1-ASOBLLNG Feature Configuration on page 4417

Self-Funded Policy

You can create a self-funded policy using a policy type where the policy category is set to **Self-Funded**. You can create a self-funded policy through a customer registration object or a health care inbound message. If the self-funded policy information is given for a bill group in a health care inbound message, the system does the following:

- Associates the bill group with the policy using the policy person role which is specified in the **Bill Group Policy Person Role** option type of the **C1-ASOBLLNG** feature configuration
- Associates the parent customer with the policy using the policy person role which is specified in the **Parent Customer Policy Person Role** option type of the **C1-ASOBLLNG** feature configuration

Price Items

Each service offered in the self-funded plan should be defined as a price item in the system. You must add the price item in a pricing rule type. The system then enables you to create a pricing rule for a price item using the respective pricing rule type.

You can define a price item and associate the required parameters with the price item from the user interface. You can use the price item parameters for defining multi parameter based pricing or for aggregating the transactions.

Pricing Rule Types

You can create a pricing rule using the respective pricing rule type. The system enables you to create pricing rule types of the following categories for the self-funded plan from the user interface:

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Pricing Rule Type	Pricing Rule Type Category	Sample Shipped with the Product
Claim	Claim	CLAIM
Retention Type Claim Based	Retention Type Claim Based	RETCLMBSD
Discount Share	Discount Arrangement	DISSHARE
Discount Guarantee	Discount Arrangement	DISGUAR
One-Time Flat Fees	Flat Fees	ONETIMEFLATFEES
Bill Period Based Recurring Flat Fees	Flat Fees	RECFLATFEES_BP
Frequency Based Recurring Flat Fees	Flat Fees	RECFLATFEES_FREQ
Retention Type Enrollment Based	Retention Type Enrollment Based	RETENRLBSD
Ancillary	Ancillary	ANCILLARY
Specific Stop-Loss	Specific Stop-Loss	SSL
Aggregate Stop-Loss	Aggregate Stop-Loss	ASL
Enrollment Based Premium	Level Funded	LVLENRLPRE
Flat Rate Based Premium	Level Funded	LVLFLATPRE

Pricing Rules

The self-funded plan may offer various services to the employer, such as claim administration, reinsurance or stop-loss, discount or level funding arrangement, and so on. Oracle Revenue Management and Billing enables you to define pricing rules for various services offered in the self-funded plan. The below table lists the pricing rules which you can define for the following services offered in the self-funded plan:

Service	Pricing Rule	Created for....
Claim Administration	Claim	Parent Customer
Claim Administration	Claim	Bill Group's Policy where the Parent Customer is the Policy Holder
Claim Administration	Retention Type Claim Based	Parent Customer
Claim Administration	Retention Type Claim Based	Bill Group's Policy where the Parent Customer is the Policy Holder
Claim Administration	Discount Share	Parent Customer
Claim Administration	Discount Guarantee	Parent Customer
Claim Administration	One-Time Flat Fees	Bill Group's Policy where the Parent Customer is the Policy Holder
Claim Administration	Bill Period Based Recurring Flat Fees	Bill Group's Policy where the Parent Customer is the Policy Holder
Claim Administration	Frequency Based Recurring Flat Fees	Bill Group's Policy where the Parent Customer is the Policy Holder
Enrollment	Retention Type Enrollment Based	Parent Customer

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Service	Pricing Rule	Created for....
Enrollment	Retention Type Enrollment Based	Bill Group's Policy where the Parent Customer is the Policy Holder
Ancillary, such as Laboratory, Radiology, Pharmacy, Physical Therapy, or Preventive Care	Ancillary	Parent Customer
Ancillary, such as Laboratory, Radiology, Pharmacy, Physical Therapy, or Preventive Care	Ancillary	Bill Group's Policy where the Parent Customer is the Policy Holder
Stop-Loss	Specific Stop-Loss	Parent Customer
Stop-Loss	Specific Stop-Loss	Bill Group's Policy where the Parent Customer is the Policy Holder
Stop-Loss	Aggregate Stop-Loss	Parent Customer
Stop-Loss	Aggregate Stop-Loss	Bill Group's Policy where the Parent Customer is the Policy Holder
Level Funding Arrangement	Enrollment Based Premium	Parent Customer
Level Funding Arrangement	Enrollment Based Premium	Bill Group's Policy where the Parent Customer is the Policy Holder
Level Funding Arrangement	Flat Rate Based Premium	Parent Customer
Level Funding Arrangement	Flat Rate Based Premium	Bill Group's Policy where the Parent Customer is the Policy Holder

You can create the above mentioned self-funded pricing rules for a parent customer or for the policy of the bill group from the user interface and not through a health care inbound message.

The system creates a price assignment for each pricing rule. In case of the retention type claim and enrollment based pricing rules, the system creates multiple price assignments when different claim based or enrollment based fee is offered for employees with different set of employee attributes.

The system first searches for the pricing rule of a price item (i.e. service) at the bill group level. If the effective pricing rule for a price item is available at the bill group level, the system uses it for deriving the price assignment. However, if the effective pricing rule for a price item is not available at the bill group level, the system searches for the pricing rule of a price item at the parent customer level. If the effective pricing rule for a price item is available at the parent customer level, the system uses it for deriving the price assignment. However, if the effective pricing rule for a price item is not available at the bill group or parent customer level, the system does not consider the respective price item for billing.

Price Assignments

The system creates a price assignment for each self-funded pricing rule. In case of the retention type claim and enrollment based pricing rules, the system creates multiple price assignments when different claim based or enrollment based fee is offered for employees with different set of employee attributes.

The system automatically creates a price assignment whenever you create a self-funded pricing rule. The system creates the price assignment in a price list and assigns the price list to the parent customer or bill group. The system creates multiple price assignments when you define a pricing rule for a policy of a bill group using a pricing group.

Related Topics

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For more information on...	See...
Pricing Group	Pricing Group on page 2933

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Chapter 4

Health Insurance Business Management

Topics:

- Policy Type
- Policy Person Role
- Contract Relationship Type
- Source System Extendable Lookup
- Extendable Lookup (Source System)
- Membership Identifier Type
- Pricing Parameters
- Geographic Rating Area
- Member Relationship Pricing Parameter
- Subscription Tier Pricing Parameter
- Membership Benefits
- Geographic Rating Area Preference
- Member Relationship and Subscription Tier Preference

Health insurance is a type of insurance coverage that typically pays for medical, surgical, prescription drug and sometimes dental expenses incurred by the insured. Health insurance can reimburse the insured for expenses incurred from illness or injury, or pay the care provider directly. It is often included in employer benefit packages as a means of enticing quality employees, with premiums partially covered by the employer but often also deducted from employee paychecks.

Oracle Revenue Management and Billing has extended its pricing and billing engines to meet the requirements of the following three lines of health insurance business:

- Fully-Insured Group Policy on page 185
- Self-Funded Group Policy on page 335
- Individual Health Insurance on page 381

To use the pricing and billing engines for the above three lines of health insurance business, you need to set the respective prerequisites:

Line of Business	Prerequisites
Fully-Insured Group Health Insurance	Refer to the Pre-requisites on page 186 section.
Self-Funded Group Health Insurance	Refer to the Pre-requisites on page 336 section.
Individual Health Insurance	Refer to the Pre-requisites on page 383 section.

Policy Type

Oracle Revenue Management and Billing enables you to define a policy type using which you can create a policy. The policy type helps the system to determine:

- **Policy Category** - The category implies the line of business in the health insurance domain for which the policy should be created using the policy type. The valid values are:
  - Fully-Insured Group
  - Fully-Insured Individual
  - Self-Funded

  Note: At present, the **Fully-Insured Individual** policy category is not supported in the system.
- **Policy Business Object** - The business object using which the policy should be created in the system. You can specify the **C1-POLICY** or **C1-ASOPolicy** business object depending on whether you want to create the policy type for the fully-insured group or self-funded health insurance business.

The **Policy Type** screen allows you to define, edit, copy, and delete a policy type. It contains the following zones:

- Policy Type List on page 20
- Policy Type on page 21

Policy Type List

The **Policy Type List** zone lists the policy types that are already defined in the system. It contains the following columns:

Column Name	Column Description
Policy Type	Displays the policy type.
Description	Displays the description of the policy type.
Policy Category	Indicates the category to which the policy type belongs. The valid values are: • Self-Funded • Fully-Insured Group • Fully-Insured Individual
Edit	On clicking the **Edit** (✎) icon, the **Policy Type** screen appears where you can edit the details of the policy type.
Duplicate	On clicking the **Duplicate** (⧉) icon, the **Policy Type** screen appears where you can define a new policy type using an existing policy type.
Delete	On clicking the **Delete** (🗑) icon, you can delete the policy type. **Note:** You can delete a policy type when a policy is not created using the policy type.

Note: Pagination is used to display limited number of records in this zone. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

On clicking the **Broadcast** (📡) icon corresponding to a policy type, the **Policy Type** zone appears with the details of the respective policy type.

You can filter the list using the **Policy Category** field available in the **Filter** area. By default, the **Filter** area is hidden. You can view the **Filter** area by clicking the **Filters** (▽) icon in the upper right corner of this zone.

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Related Topics

For more information on...	See...
How to edit a policy type	Editing a Policy Type on page 24
How to copy a policy type	Copying a Policy Type on page 26
How to delete a policy type	Deleting a Policy Type on page 27
How to view the details of a policy type	Viewing the Policy Type Details on page 28

Policy Type

The **Policy Type** zone displays the details of the policy type. It contains the following sections:

- **Main** - Displays basic information about the policy type. It contains the following fields:

Field Name	Field Description
Policy Type	Displays the policy type.
Policy Business Object	Indicates the business object using which the policy should be created. In addition, a context menu appears corresponding to this field which helps in navigating to other screens in the application. **Note:** It has a link. On clicking the link, the **Business Object** screen appears where you can view the details of the respective business object.
Description	Displays the description of the policy type.
Status	Indicates the status of the policy type. The valid values are: • Active • Inactive
Policy Category	Indicates the category to which the policy type belongs. The valid values are: • Self-Funded • Fully-Insured Group • Fully-Insured Individual
Detailed Description	Displays additional information about the policy type.

- **Characteristics** - Lists the characteristics defined for the policy type. It contains the following columns:

Column Name	Column Description
Characteristic Type	Indicates the characteristic type.
Characteristic Value	Displays the value of the characteristic type.

- **Record Actions** - This section contains the following buttons:

Button Name	Button Description
Edit	Used to edit the details of the policy type.
Delete	Used to delete the policy type.

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Button Name	Button Description
	Note: You can delete a policy type when a policy is not created using the policy type.
Duplicate	Used to create a new policy type using an existing policy type.

- **Record Information** - This section contains the following field:

Field Name	Field Description
Business Object	Indicates the business object using which the policy type is created. In addition, a context menu appears corresponding to this field which helps in navigating to other screens in the application.
	Note: It has a link. On clicking the link, the **Business Object** screen appears where you can view the details of the respective business object.

By default, the **Policy Type** zone does not appear in the **Policy Type** screen. It appears when you click the **Broadcast** (📡) icon corresponding to the policy type in the **Policy Type List** zone.

Related Topics

For more information on...	See...
How to edit a policy type	Editing a Policy Type on page 24
How to delete a policy type	Deleting a Policy Type on page 27
How to copy a policy type	Copying a Policy Type on page 26
How to view the details of a policy type	Viewing the Policy Type Details on page 28

Defining a Policy Type

Prerequisites

To define a policy type, you should have:

- Required policy business object defined in the application

Note: The **C1-POLICY** and **C1-ASOPolicy** business objects are shipped with the product. You can use the **C1-POLICY** business object to create a fully-insured group policy and the **C1-ASOPolicy** business object to create a self-funded policy.

Procedure

To define a policy type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **P** and then click **Policy Type**.
   A sub-menu appears.
3. Click the **Add** option from the **Policy Type** sub-menu.

   The **Policy Type** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details about the policy type.
   - **Characteristics** - Used to define the characteristics for the policy type.

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The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Policy Type	Used to specify the policy type.	Yes
Business Object	Indicates the business object using which you are defining the policy type.	Not applicable
Policy Business Object	Used to indicate the business object using which you want to create a policy.	Yes
Description	Used to specify the description for the policy type.	Yes
Status	Used to indicate the status of the policy type. The valid values are: • Active • Inactive	Yes
Policy Category	Used to indicate the category to which the policy type belongs. The valid values are: • Fully-Insured Group • Fully-Insured Individual • Self-Funded **Note:** At present, the **Fully-Insured Individual** policy category is not supported in the system.	Yes
Detailed Description	Used to specify additional information about the policy type.	No

Tip: Alternatively, you can access this screen by clicking the **Add** button in the **Page Title** area of the **Policy Type** screen.

4. Enter the required details in the **Main** section.

Note: If you want to create a policy type for the fully-insured group health insurance business, select the **C1-POLICY** business object from the **Policy Business Object** list and the **Fully-Insured Group** option from the **Policy Category** list. However, if you want to create a policy type for the self-funded health insurance business, select the **C1-ASOPolicy** business object from the **Policy Business Object** list and the **Self-Funded** option from the **Policy Category** list.

5. Define the characteristics for the policy type, if required.
6. Click **Save**.
   The policy type is defined.

Related Topics

For more information on...	See...
Policy Type screen	Policy Type on page 20
How to define a characteristic for a policy type	Defining a Characteristic for a Policy Type on page 24

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Defining a Characteristic for a Policy Type

Prerequisites

To define a characteristic for a policy type, you should have:

- Characteristic types defined in the application (where the characteristic entity is set to **Policy Type**).

Procedure

To define a characteristic for a policy type:

1. Ensure that the **Characteristics** section is expanded when you are defining, editing, or copying a policy type.

   The **Characteristics** section contains the following fields in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Characteristic Type	Used to indicate the characteristic type.	Yes (Conditional)
	Note: The list includes only those characteristic types where the characteristic entity is set to the **Policy Type**.	**Note:** This field is required when you are defining a characteristic for the policy type.
Characteristic Value	Used to specify the value for the characteristic type.	Yes (Conditional)
	Note: If you select a predefined characteristic type, the **Search** (🔍) icon appears corresponding to the **Characteristic Value** field. On clicking the **Search** icon, the **Predefined Characteristic Search** window appears. On specifying the value for a predefined characteristic type, the description of the characteristic value appears corresponding to the **Characteristic Value** field.	**Note:** This field is required when you are defining a characteristic for the policy type.

2. Enter the required details in the **Characteristics** section.
3. If you want to define more than one characteristic for the policy type, click the **Add** (+) icon and then repeat *step 2*.

Note: However, if you want to remove a characteristic from the policy type, click the **Delete** (🗑) icon corresponding to the characteristic.

Related Topics

For more information on...	See...
How to define a policy type	Defining a Policy Type on page 22
How to edit a policy type	Editing a Policy Type on page 24
How to copy a policy type	Copying a Policy Type on page 26

Editing a Policy Type

Prerequisites

To edit a policy type, you should have:

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- Required policy business object defined in the application

> **Note:** The **C1-POLICY** and **C1-ASOPolicy** business objects are shipped with the product. You can use the **C1-POLICY** business object to create a fully-insured group policy and the **C1-ASOPolicy** business object to create a self-funded policy.

Procedure

To edit a policy type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **P** and then click **Policy Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Policy Type** sub-menu.
   The **Policy Type** screen appears.
4. In the **Policy Type List** zone, click the **Edit** (✎) icon in the **Edit** column corresponding to the policy type *w*hose details you want to edit.

   The **Policy Type** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details about the policy type.
   - **Characteristics** - Used to define the characteristics for the policy type.

   The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Policy Type	Displays the policy type.	Not applicable
Business Object	Indicates the business object using which you are defining the policy type.	Not applicable
Policy Business Object	Used to indicate the business object using which you want to create a policy.	Yes
Description	Used to specify the description for the policy type.	Yes
Status	Used to indicate the status of the policy type. The valid values are: • Active • Inactive	Yes
Policy Category	Used to indicate the category to which the policy type belongs. The valid values are: • Fully-Insured Group • Fully-Insured Individual • Self-Funded **Note:** At present, the **Fully-Insured Individual** policy category is not supported in the system.	Yes
Detailed Description	Used to specify additional information about the policy type.	No

> **Tip:** Alternatively, you can edit the details of a policy type by clicking the **Edit** button in the **Policy Type** zone.

5. Modify the required details in the **Main** section.
6. Define, edit, or remove characteristics of the policy type, if required.

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7. Click **Save**.
   The changes made to the policy type are saved.

Related Topics

For more information on...	See...
Policy Type screen	Policy Type on page 20
Policy Type List zone	Policy Type List on page 20
Policy Type zone	Policy Type on page 21
How to define a characteristic for a policy type	Defining a Characteristic for a Policy Type on page 24

Copying a Policy Type

Instead of creating a policy type from scratch, you can create a new policy type using an existing policy type. This is possible through copying a policy type. On copying a policy type, the details including the characteristics are copied to the new policy type. You can then edit the details, if required.

Prerequisites

To copy a policy type, you should have:

- Policy type (whose copy you want to create) defined in the application
- Required policy business object defined in the application

> **Note:** The **C1-POLICY** and **C1-ASOPolicy** business objects are shipped with the product. You can use the **C1-POLICY** business object to create a fully-insured group policy and the **C1-ASOPolicy** business object to create a self-funded policy.

Procedure

To copy a policy type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **P** and then click **Policy Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Policy Type** sub-menu.
   The **Policy Type** screen appears.
4. In the **Policy Type List** zone, click the **Duplicate**(⧉) icon in the **Duplicate** column corresponding to the *p*olicy type whose copy you want to create.

   The **Policy Type** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details about the policy type.
   - **Characteristics** - Used to define the characteristics for the policy type.

   The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Policy Type	Used to specify the policy type.	Yes
Business Object	Indicates the business object using which you are defining the policy type.	Not applicable

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Field Name	Field Description	Mandatory (Yes or No)
Policy Business Object	Used to indicate the business object using which you want to create a policy.	Yes
Description	Used to specify the description for the policy type.	Yes
Status	Used to indicate the status of the policy type. The valid values are: • Active • Inactive	Yes
Policy Category	Used to indicate the category to which the policy type belongs. The valid values are: • Fully-Insured Group • Fully-Insured Individual • Self-Funded **Note:** At present, the **Fully-Insured Individual** policy category is not supported in the system.	Yes
Detailed Description	Used to specify additional information about the policy type.	No

Tip: Alternatively, you can copy a policy type by clicking the **Duplicate** button in the **Policy Type** zone.

5. Enter the required details in the **Main** section.
6. Define, edit, or remove characteristics of the policy type, if required.
7. Click **Save**.
   The new policy type is defined.

Related Topics

For more information on...	See...
Policy Type screen	Policy Type on page 20
Policy Type List zone	Policy Type List on page 20
Policy Type zone	Policy Type on page 21
How to define a characteristic for a policy type	Defining a Characteristic for a Policy Type on page 24

Deleting a Policy Type

Procedure

To delete a policy type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **P** and then click **Policy Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Policy Type** sub-menu.
   The **Policy Type** screen appears.

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4. In the **Policy Type List** zone, click the **Delete** (🗑) icon in the **Delete** column corresponding to the policy type *t*hat you want to delete.
   A message appears confirming whether you want to delete the policy type.

   Note: You can delete a policy type when a policy is not created using the policy type.

   Tip: Alternatively, you can delete a policy type by clicking the **Delete** button in the **Policy Type** zone.
5. Click **OK**.
   The policy type is deleted.

Related Topics

For more information on...	See...
Policy Type screen	Policy Type on page 20
Policy Type List zone	Policy Type List on page 20
Policy Type zone	Policy Type on page 21

Viewing the Policy Type Details

Procedure

To view the details of a policy type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **P** and then click **Policy Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Policy Type** sub-menu.
   The **Policy Type** screen appears.
4. In the **Policy Type List** zone, click the **Broadcast** (📡) icon corresponding to the policy type whose details *y*ou want to view.
   The **Policy Type** zone appears.
5. View the details of the policy type in the **Policy Type** zone.

Related Topics

For more information on...	See...
Policy Type screen	Policy Type on page 20
Policy Type List zone	Policy Type List on page 20
Policy Type zone	Policy Type on page 21

Policy Person Role

Oracle Revenue Management and Billing enables you to specify the role of a person while associating the person to a policy. This helps to indicate whether the person is a policy holder, broker, underwriter, and so on in a policy. The **Policy Person Role** screen allows you to define, edit, and delete a policy person role. It contains the following zone:

- Policy Person Role List on page 29

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Policy Person Role List

The **Policy Person Role List** zone lists the roles which you can assign to a person in a policy. It contains the following columns:

Column Name	Column Description
Policy Person Role	Displays the policy person role.
Description	Displays the description of the policy person role.
Edit	On clicking the **Edit** (✎) icon, the **Policy Person Role** screen appears where you can edit the details of the policy person role.
Delete	On clicking the **Delete** (🗑) icon, you can delete the policy person role.
	Note: You can delete a policy person role when it is not used while associating a person with a policy.

You can define a new policy person role by clicking the **Add** link in the upper-right corner of this zone.

You can filter the list using various search criteria (such as **Policy Person Role** and **Description**) available in the **Filter** area. By default, the **Filter** area is hidden. You can view the **Filter** area by clicking the **Filters** (▽) icon in the upper-right corner of this zone.

You can change the layout of this zone. For more information on how to change the layout, see Changing the Layout on page 4410.

Related Topics

For more information on...	See...
How to define a policy person role	Defining a Policy Person Role on page 29
How to edit a policy person role	Editing a Policy Person Role on page 30
How to delete a policy person role	Deleting a Policy Person Role on page 30

Defining a Policy Person Role

Procedure

To define a policy person role:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **P** and then click **Policy Person Role**.
   The **Policy Person Role** screen appears.
3. Click the **Add** link in the upper-right corner of the **Policy Person Role List** zone.

   The **Policy Person Role** screen appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Policy Person Role	Used to specify the policy person role.	Yes
Description	Used to specify the description for the policy person role.	Yes

4. Enter the required details in the **Policy Person Role** screen.

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5. Click **Save**.
   The policy person role is defined.

Related Topics

For more information on...	See...
Policy Person Role screen	Policy Person Role on page 28
Policy Person Role List zone	Policy Person Role List on page 29

Editing a Policy Person Role

Procedure

To edit a policy person role:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **P** and then click **Policy Person Role**.
   The **Policy Person Role** screen appears.
3. In the **Policy Person Role List** zone, click the **Edit** (✎) icon in the **Edit** column corresponding to the policy *p*erson role whose details you want to edit.

   The **Policy Person Role** screen appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Policy Person Role	Displays the policy person role.	Not applicable
Description	Used to specify the description for the policy person role.	Yes

4. Modify the required details in the **Policy Person Role** screen.
5. Click **Save**.
   The changes made to the policy person role are saved.

Related Topics

For more information on...	See...
Policy Person Role screen	Policy Person Role on page 28
Policy Person Role List zone	Policy Person Role List on page 29

Deleting a Policy Person Role

Procedure

To delete a policy person role:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **P** and then click **Policy Person Role**.
   The **Policy Person Role** screen appears.
3. In the **Policy Person Role List** zone, click the **Delete** (🗑) icon in the **Delete** column corresponding to the *p*olicy person role that you want to delete.
   A message appears confirming whether you want to delete the policy person role.

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> **Note:** You can delete a policy person role only when it is not used while associating a person with a policy.

4. Click **OK**.
   The policy person role is deleted.

Related Topics

For more information on...	See...
Policy Person Role screen	Policy Person Role on page 28
Policy Person Role List zone	Policy Person Role List on page 29

Contract Relationship Type

Oracle Revenue Management and Billing enables you to define various relationship types using which you can relate main subscriber and other dependent persons in a membership. The **Contract Relationship Type** screen allows you to define, edit, and delete such relationship types. It also allows you to filter the contract relationship types using various search criteria.

Filtering the Contract Relationship Types

Prerequisites

To filter the contract relationship types, you should have:

- Contract relationship types defined in the application

Procedure

To filter the contract relationship types:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **C** and then click **Contract Relationship Type**.

   The **Contract Relationship Type** screen appears. It contains the following field:

Field Name	Field Description	Mandatory (Yes or No)
Relationship Type	Used to search a particular contract relationship type.	Yes

3. Enter the search criteria in the **Relationship Type** field.

> **Note:** ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.

4. Click **Search**.
   The search results are filtered based on the specified criteria.

Related Topics

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For more information on...	See...
Contract Relationship Type screen	Contract Relationship Type on page 31

Defining a Contract Relationship Type

Procedure

To define a contract relationship type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **C** and then click **Contract Relationship Type**.

   The **Contract Relationship Type** screen appears. It contains the following fields in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Relationship Type	Used to specify the contract relationship type.	Yes
Description	Used to specify the description for the contract relationship type.	Yes

3. Enter the required details in the **Contract Relationship Type** screen.
4. If you want to define more than one contract relationship type, click the **Add** (+) icon and then repeat step 3.

Note: However, if you want to remove a contract relationship type, click the **Delete** (🗑) icon corresponding to the contract relationship type.

5. Click **Save**.
   The contract relationship type is defined.

Related Topics

For more information on...	See...
Contract Relationship Type screen	Contract Relationship Type on page 31

Editing a Contract Relationship Type

Procedure

To edit a contract relationship type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **C** and then click **Contract Relationship Type**.
   The **Contract Relationship Type** screen appears.
3. If required, you can filter the list in the **Contract Relationship Type** screen.

   A list of contract relationship types that meet the search criteria appears in the search results. The **Search Results** section contains the following fields in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Relationship Type	Displays the contract relationship type.	Not applicable

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Field Name	Field Description	Mandatory (Yes or No)
Description	Used to specify the description for the contract relationship type.	Yes

4. Modify the required details in the **Contract Relationship Type** screen.
5. Click **Save**.
   The changes made to the contract relationship type are saved.

Related Topics

For more information on...	See...
Contract Relationship Type screen	Contract Relationship Type on page 31
How to filter the contract relationship types	Filtering the Contract Relationship Types on page 31

Deleting a Contract Relationship Type

Procedure

To delete a contract relationship type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **C** and then click **Contract Relationship Type**.
   The **Contract Relationship Type** screen appears.
3. If required, you can filter the list in the **Contract Relationship Type** screen.
   A list of contract relationship types that meet the search criteria appears in the **Search Results** section.
4. Click the **Delete** (🗑) icon corresponding to the contract relationship type that you want to delete.

> **Note:** You can delete a contract relationship type when it is not yet used in the system.

5. Click **Save**.
   The contract relationship type is deleted.

Related Topics

For more information on...	See...
Contract Relationship Type screen	Contract Relationship Type on page 31
How to filter the contract relationship types	Filtering the Contract Relationship Types on page 31

Source System Extendable Lookup

Oracle Revenue Management and Billing enables you to track the external system from where the fully-insured group or self-funded policies are received for billing. Each external system must be defined in the system using the **Source System (C1-SourceSystemLookup)** extendable lookup.

The **Extendable Lookup Query** screen allows you to search for an extendable lookup. It contains the following zone:

- Extendable Lookup Search on page 34

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Extendable Lookup Search

The **Extendable Lookup Search** zone allows you to search for an extendable lookup. It contains the following two sections:

- **Search Criteria** - The **Search Criteria** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Business Object	Used to search a particular extendable lookup business object.	No
Description	Used to search extendable lookups with a particular description.	No

Note: You must specify at least one search criterion while searching for an extendable lookup.

- **Search Results** - On clicking the **Search** button, the search results appear based on the specified search criteria. The **Search Results** section contains the following columns:

Column Name	Column Description
Business Object	Displays the extendable lookup business object.
Description	Displays the description of the extendable lookup business object. **Note:** It has a link. On clicking the link, the **Extendable Lookup** screen appears where you can view the details of the respective extendable lookup.

Related Topics

For more information on...	See...
How to search for the **Source System** extendable lookup	Searching for the Source System Extendable Lookup on page 34
How to view the values of the **Source System** extendable lookup	Viewing the Values of the Source System Extendable Lookup on page 35

Searching for the Source System Extendable Lookup

Procedure

To search for the **Source System** extendable lookup:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **E** and then click **Extendable Lookup**.
   The **Extendable Lookup Query** screen appears.
3. In the **Extendable Lookup Search** zone, enter **C1-SourceSystemLookup** in the **Business Object** field.

Note: ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.

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4. Click **Search**.
   The **Source System** extendable lookup business object appears in the **Search Results** section.

Related Topics

For more information on...	See...
Extendable Lookup Query screen	Source System Extendable Lookup on page 33
Extendable Lookup Search zone	Extendable Lookup Search on page 34

Viewing the Values of the Source System Extendable Lookup

Procedure

To view the values of the **Source System** extendable lookup:

1. Search for the **Source System** extendable lookup in the **Extendable Lookup Query** screen.
2. In the **Search Results** section, click the link in the **Description** column corresponding to the extendable lookup *b*usiness object whose details you want to view.
   The **Extendable Lookup** screen appears.
3. View the values of the **Source System** extendable lookup in the **Extendable Lookup Value List** zone.

Related Topics

For more information on...	See...
How to search for the source system extendable lookup	Searching for the Source System Extendable Lookup on page 34
Extendable Lookup screen	Extendable Lookup (Source System) on page 35
Extendable Lookup Value List zone	Extendable Lookup Value List on page 35

Extendable Lookup (Source System)

The **Extendable Lookup** screen allows you to view the values of the **Source System (C1-SourceSystemLookup)** extendable lookup. It also allows you to define, edit, copy, and delete a source system. It contains the following zones:

- Extendable Lookup Value List on page 35
- Extendable Lookup Value on page 36

Extendable Lookup Value List

The **Extendable Lookup Value List** zone lists the values which are already defined for the **Source System** extendable lookup. It contains the following columns:

Column Name	Column Description
Value	Displays the source system.
Description	Displays the description of the source system.
Owner	Indicates who has created the source system. The valid values are: • Framework

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Column Name	Column Description
	• Base • Customer Modification
Edit	On clicking the **Edit** (✎) icon, the **Extendable Lookup** screen appears where you can edit the details of the source system.
Duplicate	On clicking the **Duplicate** (⧉) icon, the **Extendable Lookup** screen appears where you can define a new source system using an existing source system.
Delete	On clicking the **Delete** (🗑) icon, you can delete the source system.
	Note: You can delete a source system when it is not yet used in the system.
Detailed Description	Displays additional information about the source system.

Note: Pagination is used to display limited number of records in this zone. You can use the navigation buttons, such as **Previous** and **Next** to navigate between pages.

On clicking the **Broadcast** (📡) icon corresponding to a source system, the **Extendable Lookup Value** zone appears with the details of the respective source system.

You can filter the list using various search criteria (such as, **Value** and **Description**) available in the **Filter** area. By default, the **Filter** area is hidden. You can view the **Filter** area by clicking the **Filters** (▽) icon in the upper right corner of this zone.

Related Topics

For more information on...	See...
How to edit a source system	Editing a Source System on page 38
How to copy a source system	Copying a Source System on page 39
How to delete a source system	Deleting a Source System on page 40
How to view the details of a source system	Viewing the Source System Details on page 41

Extendable Lookup Value

The **Extendable Lookup Value** zone displays the details of the source system. It contains the following sections:

- **Main** - Displays basic information about the source system. It contains the following fields:

Field Name	Field Description
Source System	Displays the source system.
Description	Displays the description of the source system.
Override Description	Displays the overridden description of the source system.
Detailed Description	Displays additional information about the source system.
Status	Indicates the status of the source system. The valid values are: • Active • Inactive

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- **Record Actions** - This section contains the following buttons:

Button Name	Button Description
Edit	Used to edit the details of the source system.
Delete	Used to delete the source system. **Note:** You can delete a source system when it is not yet used in the system.
Duplicate	Used to create a source system using an existing source system.

- **Record Information** - This section contains the following fields:

Field Name	Field Description
Business Object	Indicates the extendable lookup business object using which the source system is created. In addition, a context menu appears corresponding to this field which helps in navigating to other screens in the application. **Note:** It has a link. On clicking the link, the **Business Object** screen appears where you can view the details of the respective business object.
Owner	Indicates who has created the source system. The valid values are: • Framework • Base • Customer Modification

By default, the **Extendable Lookup Value** zone does not appear in the **Extendable Lookup** screen. It appears when you click the **Broadcast** (📡) icon corresponding to the source system in the **Extendable Lookup Value List** zone.

Related Topics

For more information on...	See...
How to edit a source system	Editing a Source System on page 38
How to copy a source system	Copying a Source System on page 39
How to delete a source system	Deleting a Source System on page 40
How to view the details of a source system	Viewing the Source System Details on page 41

Defining a Source System

Procedure

To define a source system:

1. Search for the **Source System** extendable lookup in the **Extendable Lookup Query** screen.
2. In the **Search Results** section, click the link in the **Description** column corresponding to the extendable lookup *b*usiness object whose details you want to view.
   The **Extendable Lookup** screen appears.
3. Click the **Add** button in the **Page Title** area of the **Extendable Lookup** screen.

   The **Extendable Lookup** screen appears. It contains the following section:

   - **Main** - Used to specify basic details about the source system.

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The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Source System	Used to specify the external system from where the policies are received for billing.	Yes
Description	Used to specify the description for the source system.	Yes
Override Description	Used when you want to override the description of the source system.	No
Detailed Description	Used to specify additional information about the source system.	No
Status	Used to indicate the status of the source system. The valid values are: • Active • Inactive **Note:** By default, the value is set to **Active**.	Yes

4. Enter the required details in the **Main** section.
5. Click **Save**.
   The source system is added in the **C1-SourceSystemLookup** extendable lookup.

Related Topics

For more information on...	See...
How to search for the **Source System** extendable lookup	Searching for the Source System Extendable Lookup on page 34
Extendable Lookup screen	Extendable Lookup (Source System) on page 35

Editing a Source System

Procedure

To edit a source system:

1. Search for the **Source System** extendable lookup in the **Extendable Lookup Query** screen.
2. In the **Search Results** section, click the link in the **Description** column corresponding to the extendable lookup *b*usiness object whose details you want to view.
   The **Extendable Lookup** screen appears.
3. In the **Extendable Lookup Value List** zone, click the **Edit** (✎) icon in the **Edit** column corresponding to the *s*ource system whose details you want to edit.

   The **Extendable Lookup** screen appears. It contains the following section:

   - **Main** - Used to specify basic details about the source system.

   The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Source System	Displays the source system.	Not applicable
Description	Used to specify the description for the source system.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
Override Description	Used when you want to override the description of the source system.	No
Detailed Description	Used to specify additional information about the source system.	No
Status	Used to indicate the status of the source system. The valid values are: • Active • Inactive	Yes

Tip: Alternatively, you can edit the details of a source system by clicking the **Edit** button in the **Extendable Lookup Value** zone.

4. Modify the required details in the **Main** section.
5. Click **Save**.
   The changes made to the source system are saved.

Related Topics

For more information on...	See...
How to search for the **Source System** extendable lookup	Searching for the Source System Extendable Lookup on page 34
Extendable Lookup screen	Extendable Lookup (Source System) on page 35
Extendable Lookup Value List zone	Extendable Lookup Value List on page 35
Extendable Lookup Value zone	Extendable Lookup Value on page 36

Copying a Source System

Instead of creating a source system from scratch, you can create a new source system using an existing source system. This is possible through copying a source system. On copying a source system, the details of the source system are copied to the new source system. You can then edit the details, if required.

Prerequisites

To copy a source system, you should have:

- Source system (whose copy you want to create) defined in the application

Procedure

To copy a source system:

1. Search for the **Source System** extendable lookup in the **Extendable Lookup Query** screen.
2. In the **Search Results** section, click the link in the **Description** column corresponding to the extendable lookup *b*usiness object whose details you want to view.
   The **Extendable Lookup** screen appears.
3. In the **Extendable Lookup Value List** zone, click the **Duplicate** (⎘) icon in the **Duplicate** column *c*orresponding to the source system whose copy you want to create.

   The **Extendable Lookup** screen appears. It contains the following section:

   - **Main** - Used to specify basic details about the source system.

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The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Source System	Used to specify the external system from where the policies are received for billing.	Yes
Description	Used to specify the description for the source system.	Yes
Override Description	Used when you want to override the description of the source system.	No
Detailed Description	Used to specify additional information about the source system.	No
Status	Used to indicate the status of the source system. The valid values are: • Active • Inactive	Yes

Tip: Alternatively, you can copy a source system by clicking the **Duplicate** button in the **Extendable Lookup Value** zone.

4. Enter the required details in the **Main** section.
5. Click **Save**.
   The new source system is added in the **C1-SourceSystemLookup** extendable lookup.

Related Topics

For more information on...	See...
How to search for the **Source System** extendable lookup	Searching for the Source System Extendable Lookup on page 34
Extendable Lookup screen	Extendable Lookup (Source System) on page 35
Extendable Lookup Value List zone	Extendable Lookup Value List on page 35
Extendable Lookup Value zone	Extendable Lookup Value on page 36

Deleting a Source System

Procedure

To delete a source system:

1. Search for the **Source System** extendable lookup in the **Extendable Lookup Query** screen.
2. In the **Search Results** section, click the link in the **Description** column corresponding to the extendable lookup *b*usiness object whose details you want to view.
   The **Extendable Lookup** screen appears.
3. In the **Extendable Lookup Value List** zone, click the **Delete** (🗑) icon in the **Delete** column corresponding *t*o the source system that you want to delete.
   A message appears confirming whether you want to delete the source system.

Note: You can delete a source system when it is not yet used in the system.

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> **Tip:** Alternatively, you can delete a source system by clicking the **Delete** button in the **Extendable Lookup Value** zone.

4. Click **OK**.
   The source system is deleted from the **C1-SourceSystemLookup** extendable lookup.

Related Topics

For more information on...	See...
How to search for the **Source System** extendable lookup	Searching for the Source System Extendable Lookup on page 34
Extendable Lookup screen	Extendable Lookup (Source System) on page 35
Extendable Lookup Value List zone	Extendable Lookup Value List on page 35
Extendable Lookup Value zone	Extendable Lookup Value on page 36

Viewing the Source System Details

Procedure

To view the details of a source system:

1. Search for the **Source System** extendable lookup in the **Extendable Lookup Query** screen.
2. In the **Search Results** section, click the link in the **Description** column corresponding to the extendable lookup *b*usiness object whose details you want to view.
   The **Extendable Lookup** screen appears.
3. In the **Extendable Lookup Value List** zone, click the **Broadcast** (📡) icon corresponding to the source system *w*hose details you want to view.
   The **Extendable Lookup Value** zone appears.
4. View the details of the source system in the **Extendable Lookup Value** zone.

Related Topics

For more information on...	See...
How to search for the **Source System** extendable lookup	Searching for the Source System Extendable Lookup on page 34
Extendable Lookup screen	Extendable Lookup (Source System) on page 35
Extendable Lookup Value List zone	Extendable Lookup Value List on page 35
Extendable Lookup Value zone	Extendable Lookup Value on page 36

Membership Identifier Type

Oracle Revenue Management and Billing enables you to define an identifier for the group and individual memberships using a membership identifier type. For example, beneficiary ID, exchange subscriber ID, and so on for a group and/or individual membership. The **Membership Identifier Type** screen allows you to create, edit, delete, and copy a membership identifier type. It contains the following zones:

- Membership Identifier Type List on page 42
- Membership Identifier Type on page 43

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When you create or edit a group or individual membership through a health care inbound message or through a membership repricing request, you can define various identifiers associated with the membership using the membership identifier type. You can also add and edit membership identifiers for a group or individual membership from the user interface.

Related Topics

For more information on...	See...
How to define a membership identifier type	Defining a Membership Identifier Type on page 44
How to edit a membership identifier type	Editing a Membership Identifier Type on page 45
How to copy a membership identifier type	Copying a Membership Identifier Type on page 46
How to delete a membership identifier type	Deleting a Membership Identifier Type on page 48
How to view the details of a membership identifier type	Viewing the Membership Identifier Type Details on page 48

Membership Identifier Type List

The **Membership Identifier Type List** zone lists the membership identifier types that are already defined in the system. It contains the following columns:

Column Name	Column Description
Membership Identifier Type	Displays the membership identifier type.
Description	Displays the description of the membership identifier type.
Edit	On clicking the **Edit** (✎) icon, the **Membership Identifier Type** screen appears where you can edit the details of the membership identifier type.
Duplicate	On clicking the **Duplicate** (⧉) icon, the **Membership Identifier Type** screen appears where you can define a new membership identifier type using an existing membership identifier type.
Delete	On clicking the **Delete** (🗑) icon, you can delete the membership identifier type. **Note:** You can delete a membership identifier type when it is not yet used in the system.

Note: Pagination is used to display limited number of records in this zone. You can use the navigation links, such as **Previous** and **Next** to navigate between pages. Note that the navigation links appear in this zone only when the record count exceed 10.

On clicking the **Broadcast** ( ) icon corresponding to a membership identifier type, the **Membership Identifier Type** zone appears with the details of the respective membership identifier type.

Related Topics

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For more information on...	See...
How to edit a membership identifier type	Editing a Membership Identifier Type on page 45
How to copy a membership identifier type	Copying a Membership Identifier Type on page 46
How to delete a membership identifier type	Deleting a Membership Identifier Type on page 48
How to view the details of a membership identifier type	Viewing the Membership Identifier Type Details on page 48

Membership Identifier Type

The **Membership Identifier Type** zone displays the details of the membership identifier type. It contains the following sections:

- **Main** - Displays the basic details of the membership identifier type. It contains the following fields:

Field Name	Field Description
Membership Identifier Type	Displays the membership identifier type.
Description	Displays the description of the membership identifier type.
Validation Algorithm	Indicates the algorithm which is used to validate the value of the membership identifier type.
Detailed Description	Displays additional information about the membership identifier type.

- **Record Actions** - Enables you to perform various actions on the membership identifier type. It contains the following buttons:

Button Name	Button Description
Edit	Used to edit the details of the membership identifier type.
Delete	Used to delete the membership identifier type. **Note:** You can delete a membership identifier type when it is not yet used in the system.
Duplicate	Used to create a new membership identifier type using an existing membership identifier type.

- **Record Information** - This section contains the following field:

Field Name	Field Description
Business Object	Indicates the business object using which the membership identifier type is created. **Note:** It has a link. On clicking the link, the **Business Object** screen appears where you can view the details of the respective business object.

By default, the **Membership Identifier Type** zone does not appear in the **Membership Identifier Type** screen. It appears only when you click the**Broadcast** ( ) icon corresponding to a membership identifier type in the **Membership Identifier Type List** zone.

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Related Topics

For more information on...	See...
How to edit a membership identifier type	Editing a Membership Identifier Type on page 45
How to copy a membership identifier type	Copying a Membership Identifier Type on page 46
How to delete a membership identifier type	Deleting a Membership Identifier Type on page 48
How to view the details of a membership identifier type	Viewing the Membership Identifier Type Details on page 48

Defining a Membership Identifier Type

Prerequisites

To define a membership identifier type, you should have:

- Validation algorithm defined in the application (in case you want to use it)

Note: We have not shipped any algorithm type for the**Membership Identifier Type - Validation** algorithm entity. You can create a custom validation algorithm type for the **Membership Identifier Type - Validation** algorithm entity, if required.

Procedure

To define a membership identifier type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **M** and then click **Membership Identifier Type**.
   A sub-menu appears.
3. Click the **Add** option from the **Membership Identifier Type** sub-menu.

   The **Membership Identifier Type** screen appears. It contains the following section:

   - **Main** - Used to specify the basic details of the membership identifier type. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Membership Identifier Type	Used to specify the membership identifier type.	Yes
Description	Used to specify the description for the membership identifier type.	Yes
Validation Algorithm	Used to indicate the algorithm using which you want to validate the value of the membership identifier type. It is triggered when you define an identifier for a membership using the membership identifier type.	No

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The **Search** (🔍) icon appears corresponding to the **Validation Algorithm** field. On clicking the **Search** icon, the **Algorithm Search** window appears. Note that you can only specify an algorithm which is created for the **Membership Identifier Type - Validation** algorithm entity.	
Detailed Description	Used to specify additional information about the membership identifier type.	No

Tip: Alternatively, you can access the **Membership Identifier Type** screen by clicking the **Add** button in the **Page Title** area of the **Membership Identifier Type** screen.

4. Enter the required details in the **Main** section.
5. Click **Save**.
   The membership identifier type is defined.

Related Topics

For more information on...	See...
Membership Identifier Type screen	Membership Identifier Type on page 41

Editing a Membership Identifier Type

Prerequisites

To edit a membership identifier type, you should have:

- Validation algorithm defined in the application (in case you want to use it)

Note: We have not shipped any algorithm type for the**Membership Identifier Type - Validation** algorithm entity. You can create a custom validation algorithm type for the **Membership Identifier Type - Validation** algorithm entity, if required.

Procedure

To edit a membership identifier type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **M** and then click **Membership Identifier Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Membership Identifier Type** sub-menu.
   The **Membership Identifier Type** screen appears.
4. In the **Membership Identifier Type List** zone, click the **Edit** (✎) icon in the **Edit** column corresponding to the membership *i*dentifier type whose details you want to edit.

   The **Membership Identifier Type** screen appears. It contains the following section:

   - **Main** - Used to specify the basic details of the membership identifier type. It contains the following fields:

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Field Name	Field Description	Mandatory (Yes or No)
Membership Identifier Type	Displays the membership identifier type.	Not applicable
Description	Used to specify the description for the membership identifier type.	Yes
Validation Algorithm	Used to indicate the algorithm using which you want to validate the value of the membership identifier type. It is triggered when you define an identifier for a membership using the membership identifier type. **Note:** The **Search** (🔍) icon appears corresponding to the **Validation Algorithm** field. On clicking the **Search** icon, the **Algorithm Search** window appears. Note that you can only specify an algorithm which is created for the **Membership Identifier Type - Validation** algorithm entity.	No
Detailed Description	Used to specify additional information about the membership identifier type.	No

Tip: Alternatively, you can edit the details of a membership identifier type by clicking the **Edit** button in the **Membership Identifier Type** zone.

5. Modify the required details in the **Main** section.
6. Click **Save**.
   The changes made to the membership identifier type are saved.

Related Topics

For more information on...	See...
Membership Identifier Type screen	Membership Identifier Type on page 41
Membership Identifier Type List zone	Membership Identifier Type List on page 42
Membership Identifier Type zone	Membership Identifier Type on page 43

Copying a Membership Identifier Type

Instead of creating a membership identifier type from scratch, you can create a new membership identifier type using an existing membership identifier type. This is possible through copying a membership identifier type. On copying a membership identifier type, the details are copied to the new membership identifier type. You can then edit the details, if required.

Prerequisites

To copy a membership identifier type, you should have:

- Validation algorithm defined in the application (in case you want to use it)

Note: We have not shipped any algorithm type for the**Membership Identifier Type - Validation** algorithm entity. You can create a custom validation algorithm type for the **Membership Identifier Type - Validation** algorithm entity, if required.

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Procedure

To copy a membership identifier type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **M** and then click **Membership Identifier Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Membership Identifier Type** sub-menu.
   The **Membership Identifier Type** screen appears.
4. In the **Membership Identifier Type List** zone, click the **Duplicate** (⧉) icon in the **Duplicate** column corresponding to the membership *i*dentifier type whose copy you want to create.

   The **Membership Identifier Type** screen appears. It contains the following section:

   - **Main** - Used to specify the basic details of the membership identifier type. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Membership Identifier Type	Used to specify the membership identifier type.	Yes
Description	Used to specify the description for the membership identifier type.	Yes
Validation Algorithm	Used to indicate the algorithm using which you want to validate the value of the membership identifier type. It is triggered when you define an identifier for a membership using the membership identifier type. **Note:** The **Search** (🔍) icon appears corresponding to the **Validation Algorithm** field. On clicking the **Search** icon, the **Algorithm Search** window appears. Note that you can only specify an algorithm which is created for the **Membership Identifier Type - Validation** algorithm entity.	No
Detailed Description	Used to specify additional information about the membership identifier type.	No

Tip: Alternatively, you can copy a membership identifier type by clicking the **Duplicate** button in the **Membership Identifier Type** zone.

5. Enter the required details in the **Main** section.
6. Click **Save**.
   The new membership identifier type is defined.

Related Topics

For more information on...	See...
Membership Identifier Type screen	Membership Identifier Type on page 41
Membership Identifier Type List zone	Membership Identifier Type List on page 42
Membership Identifier Type zone	Membership Identifier Type on page 43

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Deleting a Membership Identifier Type

Procedure

To delete a membership identifier type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **M** and then click **Membership Identifier Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Membership Identifier Type** sub-menu.
   The **Membership Identifier Type** screen appears.
4. In the **Membership Identifier Type List** zone, click the **Delete** (🗑) icon in the **Delete** column corresponding to *t*he membership identifier type that you want to delete.

   A message appears confirming whether you want to delete the membership identifier type.

   Note: You can delete a membership identifier type when it is not yet used in the system.

   Tip: Alternatively, you can delete a membership identifier type by clicking the **Delete** button in the **Membership Identifier Type** zone.
5. Click **OK**.
   The membership identifier type is deleted.

Related Topics

For more information on...	See...
Membership Identifier Type screen	Membership Identifier Type on page 41
Membership Identifier Type List zone	Membership Identifier Type List on page 42
Membership Identifier Type zone	Membership Identifier Type on page 43

Viewing the Membership Identifier Type Details

Procedure

To view the details of a membership identifier type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **M** and then click **Membership Identifier Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Membership Identifier Type** sub-menu.
   The **Membership Identifier Type** screen appears.
4. In the **Membership Identifier Type List** zone, click the **Broadcast** (📡) icon corresponding *t*o the membership identifier type whose details you want to view.
   The **Membership Identifier Type** zone appears.
5. View the details of the membership identifier type in the **Membership Identifier Type** zone.

Related Topics

For more information on...	See...
Membership Identifier Type screen	Membership Identifier Type on page 41

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For more information on...	See...
Membership Identifier Type List zone	Membership Identifier Type List on page 42
Membership Identifier Type zone	Membership Identifier Type on page 43

Pricing Parameters

Oracle Revenue Management and Billing enables you to create new set of pricing parameters, such as, Geographic Rating Area, Member Relationship, and Subscription Tier for a fully-insured group and individual customers.

To create a geographic rating area pricing parameter the ORMB system uses the policy plan and geographical details (of a member person) to retrieve the appropriate rating area. This rating area is further used to obtain the rate information defined on the pricing rule that is eventually based on a particular geographical rating area. To create a member relationship pricing parameter, the ORMB system retrieves the appropriate member relationship through the post processing algorithm and stamps the retrieved member relationship on the member person belonging to a particular membership. However, to create a subscription tier pricing parameter, the ORMB system retrieves the subscription tier information through the post processing algorithm and stamps the tier information on the desired membership.

For more information on how to setup the **Pricing Parameters** feature, see Prerequisites on page 49

Related Topics

For more information on...	See...
Geographic Rating Area	Geographic Rating Area on page 51
Member Relationship Pricing Parameter	Member Relationship Pricing Parameter on page 65
Subscription Tier Pricing Parameter	Subscription Tier Pricing Parameter on page 79

Prerequisites

The following table lists the prerequisites for the pricing parameters feature:

If you want to...	Then...
Create a geographic rating area parameter	You need to do the following: • Ensure that the upstream system contains the geographic rating area details in **CSV** file. • Ensure that the **CSV** file is available at the desired path on the server, before the file upload batch is triggered. • Set the **C1-GeoRatingArea** business object validation soft parameter (**Include Plan Value Details**) to either include or exclude plan details (**Y/N**) before the file is uploaded. • Include the **C1GEORATINGARCSVUPLD** file request type for file upload purposes. • Ensure that **C1_GEO_RATING_AREA** and **C1_GEO_RATING_AREA_REL_OBJ** tables are populated before any memberships are created in the system for derivation purposes. • Configure the pricing parameter with the geographic rating area on the pricing rule. • Define the required **Address Source (C1-ADSRC)** and **Address Type (C1-ADTYP)** characteristic types in the system. Values for these characteristics

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If you want to...	Then...

	can be defined either on the policy or plan characteristics level. The address source and address type can also be defined on the state of issue of the policy or plan.
	• Define the parent policy role in the **C1-ASOBLLNG** feature configuration.
	• Define the following billing preferences in the **Field Mapping** screen:
	  • Default Address Source
	  • Default Address Type
	  • Use Plan Details
	  • Address Source Value for Policy Holder
	  • Address Source Value for Main Subscriber
	  • Geographic Rating Area Characteristic Type
	  • Address Source Characteristic Type
	  • Address Type Characteristic Type
	• Define the default value for **Geographic Rating Area Characteristic Type** in the **Premium Billing Preference** screen.

Create a member role parameter	You need to do the following:
	• Define the pricing parameter with the member role.
	• The **Admin** user must define different types of member role structures for step or party, where all the member roles must be defined in the **Member Relationship/Subscription Tier Structure** screen. These member roles must also exist in the **C1-ASOBLLNG** feature configuration.
	• Define the required characteristic types, such as, **Member Role Structure (C1-MRLST)**, **Member Role - Derivation Date Basis (C1-MRDDB)**, and **Age Calculation Date Basis (C1-AGCAL)** on the policy plan.
	• Define the following set of characteristics while adding the characteristics for the policy plan and also when the premium billing preferences are defined:
	  • Max Age of Dependent
	  • Max Number of Dependents
	  • Order Priority
	  • Young Adult Max Age Limit
	  • Young Adult Inclusion Applicability
	• The above characteristic types along with the **Member Role (C1-MEMRL)** characteristic type would be stamped on member person, must be specified in the **Premium Billing Preferences** screen.

Create a subscription tier parameter	You need to do the following: • Define the pricing parameter with the subscription tier. • The **Admin** user must define different types of subscription tiers, where all the tiers must be defined in the **Member Relationship/Subscription Tier Structure** screen. These subscription tiers must also exist in the **C1-ASOBLLNG** feature configuration. • Define the required characteristic types, such as, **Subscription Tier Structure (C1-STRST)** and **Age Calculation Date Basis (C1-AGCAL)** on the policy plan. • Define the following set of characteristics while adding the characteristics for the policy plan and also when the premium billing preferences are defined: • Max Age of Dependent

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If you want to...	Then...
	• Max Number of Dependents • Order Priority • Young Adult Max Age Limit • Young Adult Inclusion Applicability • The above characteristic types along with the **Subscription (C1-SUBST)** characteristic type would be stamped on member person, must be specified in the **Field Mapping** screen.

Related Topics

For more information on...	See...
Uploading a Geographic Rating Area File in the CSV Format	Uploading a Geographic Rating Area File in the CSV Format on page 54
CSV File Format for Uploading Geographic Rating Areas	CSV File Format for Uploading Geographic Rating Areas on page 55
Sample CSV Format for Uploading Geographic Rating Areas	Sample CSV Format for Uploading Geographic Rating Areas on page 56

Geographic Rating Area

Oracle Revenue Management and Billing enables you to use the geographic rating area as a pricing parameter while defining the age based, tier based, and additional fee pricing rules. This feature facilitates you to offer different rates for a price item based on different geographic rating area.

The system enables you to add and edit a geographic rating area from the user interface. You can also add or edit a set of geographic rating areas at once using the **File Upload Interface** utility. However, note that while editing a geographic rating area, you can only change the end date to a far future date and the status from **Active** to **Inactive**.

While maintaining a geographic rating area in the system, you can also list the policy plans available in the geographic rating area. You can add the policy plan information for a geographic rating area from the user interface or through the **File Upload Interface** utility. But, you cannot edit the policy plan information of a geographic rating area through the **File Upload Interface** utility.

You can upload the geographic rating areas from the CSV file using the **C1GEORATINGARCSVUPLD** file request type through the **File Transformation and Upload (C1-FTRAN)** batch.

Note: You need to set the **Include Plan** Or **Product Details** parameter in the **C1-GEORAVALD** algorithm to Y or N. If the value for this parameter is set to Y, the system identifies the record using the State, Zip From, Zip Plus4 From, Zip To, Zip Plus4 To, Start Date, Policy Number, Plan Number, and Source System combination. However, if the value for this parameter is set to N, the system identifies the record using the State, Zip From, Zip Plus4 From, Zip To, Zip Plus4 To, and Start Date combination.

Once you define a geographic rating area, the system can derive the geographic rating area for a membership using the **Address Source** and **Address Type** characteristic types. The system supports two address sources named **Policy Holder** and **Main Subscriber** and three address types named **Person Mailing**, **Person Seasonal**, and **Account Override**.

On adding a membership to a policy plan, the system first derives the characteristic types from the **Address Source Characteristic Type** and **Address Type Characteristic Type** attributes of a geographic rating area preference. The system considers the geographic rating area preference which is specified in the **Rating Area Field Mapping for Group** option type of the **C1-ASOBLLNG** feature configuration. Then, the system searches for these characteristics on the following entities in the specified sequence:

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1. Policy Plan
2. State where the Policy Plan is Issued
3. Policy
4. State where the Policy is Issued

If these characteristics are not defined for any of the above listed entities, the system derives the default address source and address type from the geographic rating area preference.

Note: By default, the **Address Source (C1-ADSRC)** and **Address Type (C1-ADTYP)** characteristic types are shipped with the product. You need to set these characteristic types in the respective attribute of the geographic rating area preference.

If the address source is set to **Policy Holder**, the system fetches the value from the **Parent Customer Policy Person Role** option type of the **C1-ASOBLLNG** feature configuration. The system then derives the person who is associated with the policy using the parent customer policy person role. Once the address source and address type are derived, the system fetches the state and zip code from the address type of the address source. For example, if the address source is set to **Policy Holder** and address type is set to **Person Mailing**, the system fetches the state and zip code from the policy holder's mailing address. Once the state and zip code are fetched from the address, the system checks whether the zip code is a 9-digit code. If not, the system appends zeros to make it a 9-digit zip code. The system then derives the value of the **Use Plan Details** attribute from the geographic rating area preference. If the attribute is set to **Y**, the system then derives a geographic rating area for the state, zip code, policy number, plan number, and source system combination. However, if the attribute is set to **N**, the system then derives a geographic rating area for the state and zip code combination. If the system could not derive the geographic rating area, the system derives the default geographic rating area from the geographic rating area preference. Once the geographic rating area is derived, the system stores the geographic rating area for the membership. The characteristic type specified in the **Geographic Rating Area Characteristic Type** attribute of the geographic rating area preference is used to store geographic rating area for the membership. The effective date of the characteristic is set to effective date of the address.

The geographic rating area of the membership must be changed when the address of the policy holder or main subscriber is updated. Therefore, when an address of a person is change, the system identifies the following:

- Memberships of policies where the person is the policy holder
- Memberships where the person is the main customer

For each membership, the system searches for the **Address Source** and **Address Type** characteristics on the following entities in the specified sequence:

1. Policy Plan
2. State where the Policy Plan is Issued
3. Policy
4. State where the Policy is Issued

If these characteristics are not defined for any of the above listed entities, the system derives the default address source and address type from the geographic rating area preference. If the address source is set to **Policy Holder**, the system fetches the value from the **Parent Customer Policy Person Role** option type of the **C1-ASOBLLNG** feature configuration. The system then derives the person who is associated with the policy using the parent customer policy person role.

Once the address source and address type are derived, the system fetches the state and zip code from the address type of the address source. The system then derives a geographic rating area for the state, zip code, policy number, plan number, and source system combination or for the state and zip code combination depending on the value defined for the **Use Plan Details** attribute. If the system could not derive the geographic rating area, the system derives the default geographic rating area from the geographic rating area preference. If the geographic rating area is different, the system creates a new characteristic to store the geographic rating area for the membership. The effective date of the characteristic is set to effective date of the address.

To use the geographic rating area as a pricing parameter, you need to define the Geographic Rating Area parameter where:

- **Value Type** is to **Adhoc**

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- **Source Entity** is set to **Membership**
- **Source Type** is set to **Characteristic**
- **Source Type Code** is set to a characteristic type which is specified in the **Geographic Rating Area Characteristic Type** attribute of the geographic rating area preference
- **Parameter Usage** is set to **Price Item** and **Pricing Eligibility Criteria**

Once the Geographic Rating Area parameter is defined, you need to associate the parameter with the price items for which you want to define different rates in a pricing rule using the parameter. This helps to define different base fee for a price item based on geographic rating area to which the membership belongs.

A new screen named **Geographic Rating Area** is introduced in this release. It enables you to add, edit, and inactivate a geographic rating area.

Prerequisites

To create a geographic rating area pricing parameter, you need to do the following:

- Ensure that the upstream system contains the geographic rating area details in **CSV** file.
- Ensure that the **CSV** file is available at the desired path on the server, before the file upload batch is triggered.
- Set the **C1-GeoRatingArea** business object validation soft parameter (**Include Plan Value Details**) to either include or exclude plan details (**Y/N**) before the file is uploaded.
- Include the **C1GEORATINGARCSVUPLD** file request type for file upload purposes.
- Ensure that **C1_GEO_RATING_AREA** and **C1_GEO_RATING_AREA_REL_OBJ** tables are populated before any memberships are created in the system for derivation purposes.
- Configure the pricing parameter with the geographic rating area on the pricing rule.
- Define the required **Address Source (C1-ADSRC)** and **Address Type (C1-ADTYP)** characteristic types in the system. Values for these characteristics can be defined either on the policy or plan characteristics level. The address source and address type can also be defined on the state of issue of the policy or plan.
- Define the parent policy role in the **C1-ASOBLLNG** feature configuration.
- Define the following billing preferences in the **Field Mapping** screen:
  - Default Address Source
  - Default Address Type
  - Use Plan Details
  - Address Source Value for Policy Holder
  - Address Source Value for Main Subscriber
  - Geographic Rating Area Characteristic Type
  - Address Source Characteristic Type
  - Address Type Characteristic Type
- Define the default value for **Geographic Rating Area Characteristic Type** in the **Field Mapping** screen.
- Define the required health plan in the system.

Related Topics

For more information on...	See...
Uploading a Geographic Rating Area File in the CSV Format	Uploading a Geographic Rating Area File in the CSV Format on page 54
CSV File Format for Uploading Geographic Rating Areas	CSV File Format for Uploading Geographic Rating Areas on page 55
Sample CSV Format for Uploading Geographic Rating Areas	Sample CSV Format for Uploading Geographic Rating Areas on page 56

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Uploading a Geographic Rating Area File in the CSV Format

To upload a geographic rating area file in the CSV format using the **File Upload Interface** utility, you need to do the following:

- Define a file request type for uploading geographic rating area in the CSV format. To define a file request type:

1. Click the **Admin** link in the **Application** toolbar.

   A list appears.
2. From the **Admin** menu, select **F** and then click **File Request Type**.

   A sub-menu appears.
3. Click the **Add** option from the **File Request Type** sub-menu.

   The **File Request Type** screen appears.
4. Enter the file request type and description in the respective fields.
5. Select the **Data Transformation Required** option.

   The **File Format** field is enabled.
6. Select the **Comma Separated Values** option from the **File Format** list.
7. Select the Upload and Process File Simultaneously option.
8. Attach an algorithm created using the **C1-FRTA** algorithm type to the **Data Transformation Algorithm** field.
9. In the **Services** section, enter the required sequence number.
10. Select the **Business Object** option from the **Service Type** list.
11. Enter the **C1-GeoRatingArea** business object or custom price item business object in the **Service Name** field.
12. Select the **Add** or **Update** option from the **Operation** list depending on whether you want to create new geographic rating area details or edit the existing geographic rating area details using the file request type.
13. In the **Field Transformation** section, specify the following details:

Field Name	Field Description	Mandatory (Yes or No)
Sequence	Used to indicate the data field in the CSV record which you want to upload in the system.	Yes
Field Name	Used to indicate the field for which the data is uploaded in the system.	Yes
Map Field XPath	Used to specify the XPath of the field where you want to store the data field from the CSV record.	Yes
Default Value	Used to specify the default value for the field.	No

14. Click **Save**.

    The file request type is defined for uploading the geographic rating area in the CSV format.

Related Topics

For more information on...	See...
CSV File Format for Uploading Geographic Rating Areas	CSV File Format for Uploading Geographic Rating Areas on page 55
Sample CSV Format for Uploading Geographic Rating Areas	Sample CSV Format for Uploading Geographic Rating Areas on page 56

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CSV File Format for Uploading Geographic Rating Areas

Before uploading a geographic rating area file through the **File Upload Interface** utility, you need to ensure that the CSV file contains the following data:

Data	Description	Mandatory (Yes or No)
GEO_RATING_AREA	Used to specify the geographic rating area.	Yes
STATE	Used to specify the state code which belongs to the geographical rating area.	Yes
ZIP_FROM	Used to specify the zip code from where the geographic rating area begins.	Yes
ZIP_PLUS4_FROM	Used to specify the additional four digits after the zip code from where the geographic rating area begins.	Yes
ZIP_TO	Used to specify the zip code till where the geographic rating area ends.	Yes
ZIP_PLUS4_TO	Used to specify the additional four digits after the zip code till where the geographic rating area ends.	Yes
START_DT	Used to specify the date from when the geographic rating area is effective.	Yes
END_DT	Used to specify the date till when the geographic rating area is effective.	Yes
PLAN_NBR	Used to specify the plan number belonging to a particular geographical rating area.	No
HEALTH_PLAN_CD	Used to specify the health plan belonging to a particular geographical rating area.	No
POLICY_NBR	Used to specify the policy number belonging to a particular geographical rating area.	No
SOURCE_SYSTEM	Used to specify the source system from where the policy is originated.	No
STATUS	Used to indicate the status for the geographic rating area. The valid values are: • Active • Inactive	Yes

Related Topics

For more information on...	See...
Uploading a Geographic Rating Area File in the CSV Format	Uploading a Geographic Rating Area File in the CSV Format on page 54
Sample CSV Format for Uploading Geographical Rating Area	Sample CSV Format for Uploading Geographic Rating Areas on page 56

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Sample CSV Format for Uploading Geographic Rating Areas

Let us assume that a file request type with the below field transformation details is used for uploading the geographic rating area information in the system.

The following table illustrates the field transformation details used for uploading the geographic rating area information:

Sequence	Field Name	Map Field XPath
1	GEO_RATING_AREA	C1-GeoRatingArea/geoRatingArea
2	STATE	C1-GeoRatingArea/state
3	ZIP_FROM	C1-GeoRatingArea/zipFrom
4	ZIP_PLUS4_FROM	C1-GeoRatingArea/zipPlus4From
5	ZIP_TO	C1-GeoRatingArea/zipTo
6	ZIP_PLUS4_TO	C1-GeoRatingArea/zipPlus4To
7	START_DT	C1-GeoRatingArea/startDate
8	END_DT	C1-GeoRatingArea/endDate
9	PLAN_NBR	C1-GeoRatingArea/0/geoRatingAreaRelatedObject/planNumber
10	HEALTH_PLAN_CD	C1-GeoRatingArea/0/geoRatingAreaRelatedObject/healthPlanCode
11	POLICY_NBR	C1-GeoRatingArea/0/geoRatingAreaRelatedObject/policyNumber
12	SOURCE_SYSTEM_CD	C1-GeoRatingArea/0/geoRatingAreaRelatedObject/sourceSystem
13	STATUS	C1-GeoRatingArea/boStatus

In such case, you need to ensure that the sample CSV file contains records with comma-separated values in the sequence as mentioned in the above table.

Sample CSV

```
100,AR,15000,0,15000,10,02/02/2019,02/02/2030,45675767565,MED_PLN_01,7.87E
+11,SOURCE,ACTIVE
```

Related Topics

For more information on...	See...
Uploading a Geographic Rating Area File in the CSV Format	Uploading a Geographic Rating Area File in the CSV Format on page 54
CSV File Format for Uploading Geographic Rating Areas	CSV File Format for Uploading Geographic Rating Areas on page 55

Geographic Rating Area (Used for Searching)

The **Geographic Rating Area** screen allows you to search for a geographic rating area using various search criteria. It also allows you to create a geographic rating area. This screen consists of the following zone:

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- Search Geographic Rating Area on page 57

Search Geographic Rating Area

The **Search Geographic Rating Area** zone allows you to search for geographic rating area using various search criteria. This zone contains the following two sections:

- **Search Criteria** - The **Search Criteria** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Search By	Used to indicate whether you want to search for a geographic rating area detail record using the geographic rating area details or through policy or plan details. The valid values are: • Geographic Rating Area Details • Policy or Plan Details • Health Plan Details **Note:** By default, the **Geographic Rating Area Details** option is selected.	No
State Code	Used to search the geographic rating area details belonging to a particular state code. **Note:** You must specify a state code which is already defined in the system.	No
Geographic Rating Area	Used to search the geographic rating area details based on a geographic rating area.	No
Zip Code From	Used to search the geographic rating area details which are effective from a particular zip code.	No
Zip Code To	Used to search the geographic rating area details which are effective till a particular zip code.	No
Start Date	Used to search the geographic rating area details which are effective from a particular date. **Note:** The geographic rating area start date cannot be later than the geographic rating area end date.	No
End Date	Used to search the geographic rating area details which are effective till a particular date. **Note:** The geographic rating area end date cannot be earlier than the geographic rating area start date	No
Status	Used to search the geographic rating area details based on a particular status. The valid values are: • Active • Inactive	No
Policy Number	Used to search the geographic rating area details with a particular policy number.	No

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Field Name	Field Description	Mandatory (Yes or No)
Plan Number	Used to search the geographic rating area details with a particular plan number.	No
Health Plan	Used to search the geographic rating area details which are associated with a health plan. **Note:** The **Search** (🔍) icon appears corresponding to this field. On clicking the **Search** icon, the **Health Plan Search** window appears. This field appears when the **Health Plan Details** option is selected from the **Search By** list.	No

- **Search Results** - On clicking the **Search** button, the search results appear based on the specified search criteria. The **Search Results** section contains the following columns:

Column Name	Column Description
Geographic Rating Area	Displays the geographic rating area.
State Code	Displays the state code to which the geographic rating area belongs.
Zip Code From	Displays the zip code from where the geographic rating area is effective.
Zip Code Plus 4 From	Displays the zip code plus four additional digits which identify from where the geographic rating area is effective.
Zip Code To	Displays the zip code till where the geographic rating area is effective.
Zip Code Plus 4 To	Displays the zip code plus four additional digits which identify till where the geographic rating area is effective.
Start Date	Displays the date from when the geographic rating area is effective.
End Date	Displays the date till when the geographic rating area is effective.
Status	Indicates the status of the geographic rating area. The valid values are: • Active • Inactive

Note:

Pagination is used to display limited number of records in the **Search Results** section. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

You can filter the list using various search criteria (such as, **State Code**, **Geographic Rating Area**, **Zip Code From**, **Zip Code To**, **Start Date**, **End Date**, and **Status**) available in the **Filter** area. By default, the **Filter** area is hidden. You can view the **Filter** area by clicking the Filters (▽) icon in the upper right corner of this zone.

Related Topics

For more information on...	See...
How to search for a geographic rating area	Searching for a Geographic Rating Area on page 60

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For more information on...	See...
How to view the details of a geographic rating area	Viewing the Geographic Rating Area Details on page 65
How to define a geographic rating area	Defining a Geographic Rating Area on page 61

Geographic Rating Area

The **Geographic Rating Area** zone displays the details of the geographic rating area. It contains the following sections:

- **Main** - Displays basic information about the geographic rating area. It contains the following fields:

Field Name	Field Description
Geographic Rating Area	Displays information about the geographic rating area.
State Code	Displays the state code to which the geographic rating area belongs.
Zip Code From	Displays the zip code from where the geographic rating area is effective.
Zip Code Plus 4 From	Displays the zip code plus four additional digits which identify from where the geographic rating area is effective.
Zip Code To	Displays the zip code till where the geographic rating area is effective.
Zip Code Plus 4 To	Displays the zip code plus four additional digits which identify till where the geographic rating area is effective.
Start Date	Displays the date from when the geographic rating area is effective.
End Date	Displays the date till when the geographic rating area is effective.
Status	Displays the status of the geographic rating area. The valid values are: • Active • Inactive

- **Plan Details** - Lists the plan information of the geographic rating area. It contains the following columns:

Column Name	Column Description
Policy Number	Displays the policy number which is associated with the geographic rating area.
Plan Number	Displays the plan number of the policy.
Health Plan	Indicates the health plan to which the geographic rating area is associated. **Note:** The data in this column appears only when the geographic rating area is specified for fully-insured individual.
Source System	Displays the name of the external system from where the policy is originated.

- **Record Actions** - This section contains the following buttons:

Button Name	Button Description
Edit	Used to edit the details of the geographic rating area. **Note:** The **Edit** button appears when the geographic rating area is in the **Active** status.
Inactive	Used to change the status of the geographic rating area.

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Button Name	Button Description
	Note: The **Inactive** button appears when the geographic rating area is in the **Active** status.

- **Record Information** - This section contains the following fields:

Field Name	Field Description
Business Object	Indicates the business object using which the geographic rating area is created. In addition, a context menu appears corresponding to this field which helps in navigating to other screens in the application.
	Note: It has a link. On clicking the link, the **Business Object** screen appears where you can view the details of the respective business object.
Status Date/Time	Displays the date and time when the geographic rating area status is updated.
Creation Date/Time	Displays the date and time when the geographic rating area is created.

Related Topics

For more information on...	See...
How to edit a geographic rating area	Editing a Geographic Rating Area on page 63
How to inactivate a geographic rating area	Inactivating a Geographic Rating Area on page 64

Searching for a Geographic Rating Area

Prerequisites

To search for a geographic rating area, you should have:

- Geographic rating area defined in the application.
- Policy and plan defined in the application.

Procedure

To search for a geographic rating area:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **G** and then click **Geographic Rating Area**.
   The **Geographic Rating Area** screen appears.
3. Enter the search criteria in the **Search Geographic Rating Area** zone.

   Note: ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.
4. Click **Search**.
   A list of geographic rating area that meet the search criteria appears in the **Search Results** section.

Related Topics

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For more information on...	See...
Geographic Rating Area screen	Geographic Rating Area (Used for Searching) on page 56
Geographic Rating Area zone	Geographic Rating Area on page 59

Defining a Geographic Rating Area

Procedure

To define a geographic rating area

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **G** and then click **Geographic Rating Area**.
   The **Geographic Rating Area** screen appears.
3. Click the **Add** button in the **Page Title** area of the **Geographic Rating Area** screen.

   The **Geographic Rating Area** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details about the geographic rating area.
   - **Plan Details** - Used to specify the plan details for the geographic rating area.

   The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Geographic Rating Area	Used to specify the geographic rating area.	Yes
State Code	Used to specify the state code which belongs to the geographical rating area. **Note:** You must specify a state code which is already defined in the system.	Yes
Zip Code From	Used to specify the zip code from where the geographic rating area begins.	Yes
Zip Code Plus 4 From	Used to specify the additional four digits after the zip code from where the geographic rating area begins.	Yes
Zip Code To	Used to specify the zip code till where the geographic rating area ends.	Yes
Zip Code Plus 4 To	Used to specify the additional four digits after the zip code till where the geographic rating area ends.	Yes
Start Date	Used to specify the date from when the geographic rating area is effective. **Note:** The geographic rating area start date cannot be later than the geographic rating area end date.	Yes
End Date	Used to specify the date till when the geographic rating area is effective. **Note:** The geographic rating area end date cannot be earlier than the geographic rating area start date	No

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Field Name	Field Description	Mandatory (Yes or No)
Status	Used to indicate the status for the geographic rating area. The valid values are: • Active • Inactive **Note:** You cannot assign an **Inactive** status to the geographic rating area record while you are defining a geographic rating area.	Yes

4. Enter the required details in the **Main** section.
5. Add the plan details for the geographic rating area, if required.
6. Click **Save**.
   The geographic rating area is defined in the **Active** status.

Related Topics

For more information on...	See...
Geographic Rating Area screen	Geographic Rating Area (Used for Searching) on page 56
How to add the plan details for a geographic rating area	Adding the Plan Details for a Geographic Rating Area on page 62

Adding the Plan Details for a Geographic Rating Area

Prerequisites

To add plan details for a geographic rating area, you should have:

- Policy and plan defined in the application.
- Source system defined in the application.
- Health plan defined in the application.

Procedure

To add plan details for a geographic rating area:

1. Ensure that the **Plan Details** section is expanded when you are defining or editing the geographic rating area information.

   Note: If you want to use the geographic rating area for a fully-insured group and individual businesses, you need to specify policy number, plan number, and source system fields. You can specify the health plan only when you want to use the geographic rating area for a fully-insured individual membership.

   The **Plan Details** section contains the following fields in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Policy Number	Used to specify the policy number which is associated with the geographic rating area.	No
Plan Number	Used to specify the plan number of the policy.	No
Health Plan	Used to specify the health plan which is associated with the geographic rating area.	No

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Field Name	Field Description	Mandatory (Yes or No)
	Note: You need to specify the health plan, if you want to use the geographic rating area for a fully-insured individual membership.	
Source System	Used to specify the name of the external system from where the policy is originated.	No

2. Enter the required details in the **Plan Details** section.
3. If you want to define more than one plan information for the geographic rating area, click the **Add** (+) icon and then *r*epeat step *2*.

Note: However, if you want to remove a plan information from the geographic rating area, click the **Delete** (🗑) icon corresponding to the policy number column.

Related Topics

For more information on...	See...
How to edit a geographic rating area	Editing a Geographic Rating Area on page 63

Editing a Geographic Rating Area

Procedure

To edit a geographic rating area

1. Search for the geographic rating area in the **Geographic Rating Area** screen.
2. In the **Search Results** section, click the **Broadcast** (📡) icon corresponding to the geographic rating area column whose details you want to view.
   The **Geographic Rating Area** zone appears.
3. Click the **Edit** button in the **Geographic Rating Area** screen.

   The **Geographic Rating Area** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details about the geographic rating area.
   - **Plan Details** - Used to specify the plan details for the geographic rating area.

   The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Geographic Rating Area	Used to specify the geographic rating area.	Yes
State Code	Used to specify the state code which belongs to the geographical rating area. **Note:** You must specify a state code which is already defined in the system.	Yes
Zip Code From	Used to specify the zip code from where the geographic rating area begins.	Yes
Zip Code Plus 4 From	Used to specify the additional four digits after the zip code from where the geographic rating area begins.	Yes
Zip Code To	Used to specify the zip code till where the geographic rating area ends.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
Zip Code Plus 4 To	Used to specify the additional four digits after the zip code till where the geographic rating area ends.	Yes
Start Date	Used to specify the date from when the geographic rating area is effective. **Note:** The geographic rating area start date cannot be later than the geographic rating area end date.	Yes
End Date	Used to specify the date till when the geographic rating area is effective. **Note:** The geographic rating area end date cannot be earlier than the geographic rating area start date	No
Status	Used to indicate the status for the geographic rating area. The valid values are: • Active • Inactive **Note:** You cannot assign an **Inactive** status to the geographic rating area record while you are defining a geographic rating area.	Yes

4. Modify the geographic rating area details, if required.
5. Define, edit, or remove plan details for the geographic rating area, if required.
6. Click **Save**.
   The changes made to the geographic rating area are saved.

Related Topics

For more information on...	See...
How to search for a geographic rating area	Searching for a Geographic Rating Area on page 60
Geographic Rating Area screen	Geographic Rating Area (Used for Searching) on page 56
How to add the plan details for a geographic rating area	Adding the Plan Details for a Geographic Rating Area on page 62

Inactivating a Geographic Rating Area

Procedure

To inactivate a geographic rating area:

1. Search for the geographic rating area in the **Geographic Rating Area** screen.
2. In the **Search Results** section, click the **Broadcast** (📡) icon corresponding to the geographic rating area column whose details you want to view.
   The **Geographic Rating Area** zone appears.
3. Click the **Inactive** button in the **Geographic Rating Area** zone.
   The status of the geographic rating area is changed to **Inactive**.

Note: The **Inactive** button appears when the geographic rating area is in the **Active** status.

Related Topics

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For more information on...	See...
How to search for the geographic rating area	Searching for a Geographic Rating Area on page 60
Geographic Rating Area screen	Geographic Rating Area (Used for Searching) on page 56
Geographic Rating Area zone	Geographic Rating Area on page 59

Viewing the Geographic Rating Area Details

Procedure

To view the details of the geographic rating area:

1. Search for the geographic rating area in the **Geographic Rating Area** screen.
2. In the **Search Results** section, click the **Broadcast** (ᯤ) icon corresponding to the geographic rating area column whose details you want to view.
   The **Geographic Rating Area** zone appears.
3. View the details of the geographic rating area in the **Geographic Rating Area** zone.

Related Topics

For more information on...	See...
How to search for the geographic rating area	Searching for a Geographic Rating Area on page 60
Geographic Rating Area screen	Geographic Rating Area (Used for Searching) on page 56
Geographic Rating Area zone	Geographic Rating Area on page 59

Member Relationship Pricing Parameter

Oracle Revenue Management and Billing enables you to use the member relationship (i.e. how a member is related to the main subscriber of the membership) as a pricing parameter while defining the age based, tier based, and additional fee pricing rules. This feature facilitates you to offer different rates for a price item based on different member relationship.

While adding a membership to a policy plan or while adding or inactivating a member person in a membership, the system automatically derives member relationship for each member person of the membership from a member relationship structure. You can define a member relationship structure through a characteristic on the policy plan. While defining a member relationship structure for a policy plan, you must use the characteristic type specified in the **Member Relationship Structure Characteristic Type** attribute of a member relationship and subscription tier preference. The system considers the member relationship and subscription tier preference which is specified in the **Relation Structure Code Field Mapping** option type of the **C1-ASOBLLNG** feature configuration.

The system enables you to define two types of member relationship structure:

- **Step Member Relationship Structure** - A step member relationship structure helps the system to determine how each member person is related to the main subscriber of the membership. You can specify a list of member relationships in a step member relationship structure. A member relationship is derived for a member person depending on the following:
  - Whether the member person is a self, spouse, or dependent
  - Number of spouses, dependents, and young adults in the membership

  A relationship matrix indicates whether a member person with a particular relationship type should be considered as self, spouse, or dependent while deriving the member relationship. In a step member relationship structure, a spouse is never considered as a dependent. Only children are considered as dependents.

  For example, you can create a step member relationship structure named STEPEX1 as shown below:

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Member Relationship	Self	Number of Spouses	Number of Dependents	Number of Young Adults
Self	1	0	0	0
Spouse 1	1	1	0	0
Spouse 2	1	2	0	0
Child 1	1	1	1	0
Young Adult 1	1	1	0	1
CD1 and YA1	1	1	1	1
Child 2	1	1	2	0
Young Adult 2	1	1	0	2
CD2 and YA2	1	1	2	2
Additional Dependent	1	3	3	3

Note: You can only define one member relationship in a step member relationship structure where the sum of self, number of spouses, number of dependents, and number of young adults exceeds the maximum member count specified in the step member relationship structure.

In addition, you can create a relationship matrix in the STEPEX1 member relationship structure as shown below:

Relation	Relationship Type	Relationship
Main Subscriber	Owner	Self
Main Subscriber	Member	Self
Children	Child	Dependent
Spouse	Wife	Spouse
Spouse	Spouse	Spouse

- **Party Member Relationship Structure** - A party member relationship structure helps the system to determine how each member person is related to the main subscriber of the membership. You can specify a list of member relationships in a party member relationship structure. A member relationship is derived for a member person depending on the following:
  - Whether the member person is a self or dependent
  - Number of dependents in the membership

  A relationship matrix indicates whether a member person with a particular relationship type should be considered as self or dependent while deriving the member relationship. In a party member relationship structure, a spouse is always considered as a dependent. Also, children are not categorized as young adults.

  For example, you can create a party member relationship structure named PARTYEX1 as shown below:

Member Relationship	Self	Number of Spouses	Number of Dependents	Number of Young Adults
Self	1	0	0	0
Dependent 1	1	0	1	0
Dependent 2	1	0	2	0

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Member Relationship	Self	Number of Spouses	Number of Dependents	Number of Young Adults
Dependent 3	1	0	3	0
Additional Dependents	1	0	9	0

Note: You can only define one member relationship in a party member relationship structure where the sum of self and number of dependents exceeds the maximum member count specified in the party member relationship structure.

In addition, you can create a relationship matrix in the PARTYEX1 member relationship structure as shown below:

Relation	Relationship Type	Relationship
Main Subscriber	Owner	Self
Main Subscriber	Member	Self
Children	Child	Dependent
Spouse	Wife	Dependent
Spouse	Spouse	Dependent

Once the member relationship structure is derived from the policy plan, the system determines the member relationship for each member person in the membership. While determining the member relationship for a member person, the system derives the following characteristic types from the respective attributes of the member relationship and subscription tier preference:

- Age Calculation Date Basis
- Max Age Limit for Max Dependent Count
- Max Number of Dependents Order Priority
- Maximum Number of Dependents
- Member Relationship Derivation Date
- New Born Gift Days
- New Born Gift Days Applicability
- Young Adult Max Age Limit
- Young Adult Max Age Limit Applicability

The system then derives these characteristics from the policy plan. If the **Member Relationship Derivation Date** characteristic type is set to **Enrollment Date**, the system derives the member relationship for each member person of the membership in order of the member start date. However, if the Member Relationship Derivation Date characteristic type is set to Date of Birth, the system derives the member relationship for each member person of the membership in order of the date of birth. For example, if a membership with the following member persons is added to a policy plan:

Member Start Date	Member End Date	Person Name	Main Subscriber	Relationship Type	Member	Date of Birth
1-Jan-18	31-Dec-20	Mark	Yes	Self	Yes	15-Jan-68
1-Jan-18	31-Dec-20	Nancy	No	Wife	Yes	20-Apr-72
1-Jan-18	31-Dec-20	Roger	No	Child	Yes	15-May-01
1-Jan-18	31-Dec-20	Tom	No	Child	Yes	16-May-04

Now, if the following characteristics are defined on the policy plan:

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- Member Relationship Structure - STEPEX1
- Member Relationship Derivation Date - Date of Birth
- Age Calculation Date Basis - Enrollment Date
- Maximum Number of Dependents - 3
- Max Number of Dependents Order Priority - YOUNGEST

The system will consider the STEPEX1 member relationship structure and derives the member relationship for each member person as shown below:

Member Person	Effective Date	Characteristic Type	Characteristic Value
Mark	1-Jan-18	Member Relationship	Self
Nancy	1-Jan-18	Member Relationship	Spouse 1
Tom	1-Jan-18	Member Relationship	Child 1
Roger	1-Jan-18	Member Relationship	Child 2

Note that the member relationship of Tom is derived before Roger because he is youngest of all dependents. Now, assume if one more member person named Harry with the date of birth as 05-11-08 and relationship type as Child is added to the membership on 05-Jan-18, then the system derives the member relationship for each member person of the membership as shown below:

Effective Date	Member	Member Person Characteristics	Value
1-Jan-18	Mark	Member Relationship	Self
1-Jan-18	Nancy	Member Relationship	Spouse 1
5-Jan-18	Harry	Member Relationship	Child 1
5-Jan-18	Tom	Member Relationship	Child 2
5-Jan-18	Roger	Member Relationship	Additional Dependent

The member relationship for Harry, Tom, and Roger is derived in the order of their age which is calculated from the enrollment date. Because the member relationship derived for Tom and Roger is different, the system creates a new characteristic to store the member relationship for Tom and Roger. Here, the effective date of the characteristics is set to the new member person's start date.

If a new born is added to the membership, the effective date of the new born's member relationship characteristic is calculated considering the gift days if applicable. If a member person is end dated, the system derives the member relationship of all other member persons once again. If the member relationship for a member person is different, the system creates a new characteristic to store the member relationship for the member person. The effective date of the new characteristic is set to member person's end date + 1. However, if a member person is inactivated, the system derives the member relationship of all other member persons once again. If the member relationship for a member person is different, the system updates the existing member relationship characteristic of the member person.

To use the member relationship as a pricing parameter, you need to define the Member Relationship parameter where:

- **Value Type** is to **Adhoc**
- **Source Entity** is set to **Membership Person**
- **Source Type** is set to **Characteristic**
- **Source Type Code** is set to a characteristic type which is specified in the **Member Relationship Characteristic Type** attribute of the member relationship and subscription tier preference
- **Parameter Usage** is set to **Price Item** and **Pricing Eligibility Criteria**

Once the Member Relationship parameter is defined, you need to associate the parameter with the price items for which you want to define different rates in a pricing rule using the parameter. This helps to define different base fee for a price item based on the member relationship.

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A new screen named **Member Relationship/Subscription Tier Structure** is introduced in this release. It enables you to add, edit, copy, and delete the member relationship and subscription tier structures.

Prerequisites

To create a member relationship pricing parameter, you need to do the following:

- Define the pricing parameter with the member relationship.
- The **Admin** user must define different types of member relationship structures for step or party, where all the member relationships must be defined in the **Member Relationship/Subscription Tier Structure** screen. These member relationships must also exist in the **C1-ASOBLLNG** feature configuration.
- Define the required characteristic types, such as, **Member Relationship Structure (C1-MRLST)**, **Member Relationship - Derivation Date Basis (C1-MRDDB)**, and **Age Calculation Date Basis (C1-AGCAL)** on the policy plan.
- Define the following set of characteristics while adding the characteristics for the policy plan and also when the premium billing preferences are defined:
  - Max Age of Dependent
  - Max Number of Dependents
  - Order Priority
  - Young Adult Max Age Limit
  - Young Adult Inclusion Applicability
- The above characteristic types along with the **Member Relationship (C1-MEMRL)** characteristic type would be stamped on the member person, must be specified in the **Field Mapping** screen.

Related Topics

For more information on...	See...
Uploading a Geographic Rating Area File in the CSV Format	Uploading a Geographic Rating Area File in the CSV Format on page 54
CSV File Format for Uploading Geographic Rating Areas	CSV File Format for Uploading Geographic Rating Areas on page 55
Sample CSV Format for Uploading Geographic Rating Areas	Sample CSV Format for Uploading Geographic Rating Areas on page 56

Member Relationship/Subscription Tier Structure (Used for Searching)

The **Member Relationship/Subscription Tier Structure** screen allows you to search for a member relationship/subscription tier using various search criteria. It also allows you to create a member relationship/subscription tier. Through this screen, you can navigate to the following screen. It contains the following zone:

This screen consists of the following zone:

- Member Relationship/Subscription Tier Structure List on page 69
- Member Relationship/Subscription Tier Structure on page 70

Member Relationship/Subscription Tier Structure List

The **Member Relationship/Subscription Tier Structure List** zone displays the member relationship or subscription tier structure information. It contains the following columns:

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Column Name	Column Description
Structure	Used to specify the structure code for the structure.
Description	Used to specify the description for the structure.
Edit	On clicking the **Edit** (✎) icon, the **Member Relationship/Subscription Tier Structure** screen appears where you can edit the structural details of the member relationship or subscription tier.
Duplicate	On clicking the **Duplicate** (⧉) icon, the **Member Relationship/Subscription Tier Structure** screen appears where you can define a new member relationship or subscription tier using an existing member relationship or subscription tier.
Delete	On clicking the **Delete** (🗑) icon, you can delete the member relationship or subscription tier structure.

Note:

Pagination is used to display limited number of records in the **Search Results** section. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

You can filter the list using various search criteria (such as, **Structure** and **Description**) available in the **Filter** area. By default, the **Filter** area is hidden. You can view the **Filter** area by clicking the Filters (▽) icon in the upper right corner of this zone.

Related Topics

For more information on...	See...
How to view the details of a member relationship/subscription tier structure	Viewing the Subscription Tier Structure Details on page 92
How to define a member relationship/ subscription tier structure	Defining a Subscription Tier Structure on page 85

Member Relationship/Subscription Tier Structure

The **Member Relationship/Subscription Tier Structure** zone displays the details of the member relationship or subscription tier structure. It contains the following sections:

- **Main** - Displays basic information about the member relationship or subscription tier structure. It contains the following fields:

Field Name	Field Description
Structure	Displays the type of structure.
Description	Displays the description of the structure.
Detailed Description	Displays additional information about the structure.
Maximum Member Count	Displays the maximum count of the members allowed in the structure.

- **Member Relationship/Subscription Tier Criteria** - Lists the criteria details of the member relationship or subscription tier. It contains the following columns:

Column Name	Column Description
Member Relationship/ Subscription Tier	Displays the criteria code for the member relationship or subscription tier.

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Column Name	Column Description
Self	Displays the main subscriber who meets the member relationship or subscription tier criteria. **Note:** The total count in the **Self** column cannot exceed more than one.
Number of Spouses	Displays the total number of spouses in the membership who meet the member person relationship criteria.
Number of Dependents	Displays the total number of dependents in the membership who meet the member person relationship criteria.
Number of Young Adults	Displays the total number of young adults in the membership who meet the member person relationship criteria.

- **Relationship Matrix** - Lists the relationship matrix details defined for the member relationship or subscription tier structure. It contains the following columns:

Column Name	Column Description
Relation	Indicates an entity defined in the relationship matrix.
Relationship Type	Indicates how a member person is associated with the main subscriber using a relationship type.
Relationship	Indicates how a member person is associated with the relationship type.

- **Record Actions** - This section contains the following buttons:

Button Name	Button Description
Edit	Used to edit the structural details of the member relationship or subscription tier.
Delete	Used to delete the member relationship or subscription tier structure.
Duplicate	Used to create a new member relationship or subscription tier structure using an existing structure.

- **Record Information** - This section contains the following fields:

Field Name	Field Description
Business Object	Indicates the business object using which the member relationship or subscription tier structure is created. In addition, a context menu appears corresponding to this field which helps in navigating to other screens in the application. **Note:** It has a link. On clicking the link, the **Business Object** screen appears where you can view the details of the respective business object.

Related Topics

For more information on...	See...
How to edit a member relationship/ subscription tier structure	Editing a Subscription Tier Structure on page 87
How to delete a member relationship/subscription tier structure	Deleting a Subscription Tier Structure on page 92
How to copy a member relationship/ subscription tier structure	Copying a Subscription Tier Structure on page 89

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Defining a Member Relationship Structure

Procedure

To define a member relationship structure:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **M** and then click **Member Relationship/Subscription Tier Structure**.
   A sub-menu appears.
3. Click the **Add** option from the **Member Relationship/Subscription Tier Structure** sub-menu.

   The **Member Relationship/Subscription Tier Structure** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details about the member relationship structure. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Structure	Used to specify a code name for the structure. **Note:** You must specify a unique code name for the structure.	Yes
Description	Used to specify the description for the structure.	Yes
Detailed Description	Used to specify additional information about the structure.	No
Maximum Member Count	Used to specify the maximum number of members allowed in the structure. **Note:** If you do not specify the value, by default, it is set to zero (0).	No

   - **Member Relationship/Subscription Tier Criteria** - Used to specify the criteria details for the member relationship. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Member Relationship/ Subscription Tier	Used to specify a code name for the criteria. **Note:** You must specify a unique code name for the member relationship/subscription criteria.	No
Self	Used to specify the main subscriber for the member relationship. **Note:** The value for this field must be a positive integer.	No
Number of Spouses	Used to specify the total number of spouses in the membership who meet the member relationship criteria. **Note:** The value for this field must be a positive integer.	No
Number of Dependents	Used to specify the total number of dependents in the membership who meet the member relationship criteria.	No

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The value for this field must be a positive integer.	
Number of Young Adults	Used to specify the total number of young adults in the membership who meet the member relationship criteria.	No
	Note: The value for this field must be a positive integer.	

Note: You must specify at least one criteria for the member relationship structure. However, you can specify only a single member relationship criteria, if the maximum member count is set to zero (0) or one (1).

Relationship Matrix - Used to specify the relationship matrix for the member relationship. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Relation	Used to indicate an entity in the relationship matrix.	No
Relationship Type	Used to indicate how a member person is associated with the main subscriber using a relationship type.	No
Relationship	Used to indicate how the relation is associated with the relationship type in the relationship matrix	No

Note: You must specify at least one relationship matrix.

Tip: Alternatively, you can access this screen by clicking the **Add** button in the **Page Title** area of the **Member Relationship/Subscription Tier Structure** screen.

4. Enter the required details in the **Main** section.
5. Define a criteria (for the member relationship structure) in the **Member Relationship/Subscription Tier Criteria** section.
6. If you want to define more than one criteria for the member relationship structure, click the **Add** (+) icon and then repeat step 5.

Note: However, if you want to remove a criteria from the member relationship structure, click the **Delete** (🗑) icon corresponding to the **Member Relationship/Subscription Tier** field.

7. Define the relationship matrix (for the member relationship structure) in the **Relationship Matrix** section.
8. If you want to define more than one relationship matrix for the member relationship structure, click the **Add** (+) icon and then repeat step 7.

Note: However, if you want to remove a relationship matrix from the member relationship structure, click the **Delete** (🗑) icon corresponding to the **Relation** field.

9. Click **Save**.
   The member relationship structure is defined.

Related Topics

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For more information on...	See...
Member Relationship/Subscription Tier Structure screen	Member Relationship/Subscription Tier Structure (Used for Searching) on page 69

Editing a Member Relationship Structure

Procedure

To edit a member relationship structure:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **M** and then click **Member Relationship/Subscription Tier Structure**.
   The **Member Relationship/Subscription Tier Structure** screen appears.
3. In the **Member Relationship/Subscription Tier Structure List** zone, click the **Edit** (✎) icon in the **Edit** column corresponding to the member relationship structure whose details you want to edit.

   The **Member Relationship/Subscription Tier Structure** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details about the member relationship structure. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Structure	Displays the member relationship structure name.	Not applicable
Description	Used to specify the description for the structure.	Yes
Detailed Description	Used to specify additional information about the structure.	No
Maximum Member Count	Used to specify the maximum number of members allowed in the structure. **Note:** If you do not specify the value, by default, it is set to zero (0).	No

   - **Member Relationship/Subscription Tier Criteria** - Used to define a criteria for the member relationship. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Member Relationship/ Subscription Tier	Used to specify a code name for the criteria. **Note:** You must specify a unique code name for the member relationship/subscription criteria.	No
Self	Used to specify the main subscriber for the member relationship. **Note:** The value for this field must be a positive integer.	No
Number of Spouses	Used to specify the total number of spouses in the membership who meet the member relationship criteria. **Note:** The value for this field must be a positive integer.	No

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Field Name	Field Description	Mandatory (Yes or No)
Number of Dependents	Used to specify the total number of dependents in the membership who meet the member relationship criteria. **Note:** The value for this field must be a positive integer.	No
Number of Young Adults	Used to specify the total number of young adults in the membership who meet the member relationship criteria. **Note:** The value for this field must be a positive integer.	No

Note:

You must specify at least one criteria for the member relationship structure. However, you can specify only a single member relationship criteria, if the maximum member count is set to zero (0) or one (1).

Relationship Matrix - Used to define a relationship matrix for the member relationship. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Relation	Used to indicate an entity in the relationship matrix.	No
Relationship Type	Used to indicate how a member person is associated with the main subscriber using a relationship type.	No
Relationship	Used to indicate how the relation is associated with the relationship type in the relationship matrix	No

Note: You must specify at least one relationship matrix.

Tip: Alternatively, you can edit the details of a member relationship structure by clicking the **Edit** button in the **Member Relationship/Subscription Tier Structure** zone.

4. Modify the details in the **Main** section.
5. Define, edit, or remove the criteria (for the member relationship structure) in the **Member Relationship/ Subscription Tier Criteria** section.
6. If you want to define more than one criteria for the member relationship structure, click the **Add** (+) icon and then repeat step 5.

Note: However, if you want to remove a criteria from the member relationship structure, click the **Delete** (🗑) icon corresponding to the **Member Relationship/Subscription Tier** field.

7. Define, edit, or remove the relationship matrix (for the member relationship structure) in the **Relationship Matrix** section.
8. If you want to define more than one relationship matrix for the member relationship structure, click the **Add** (+) icon and then repeat step 7.

Note: However, if you want to remove a relationship matrix from the member relationship structure, click the **Delete** (🗑) icon corresponding to the **Relation** field.

9. Click **Save**.

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The changes made to the member relationship structure are saved.

Related Topics

For more information on...	See...
Member Relationship/Subscription Tier Structure screen	Member Relationship/Subscription Tier Structure (Used for Searching) on page 69
Member Relationship/Subscription Tier Structure List zone	Member Relationship/Subscription Tier Structure List on page 69
Member Relationship/Subscription Tier Structure zone	Member Relationship/Subscription Tier Structure on page 70

Copying a Member Relationship Structure

Procedure

To copy a member relationship structure:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **M** and then click **Member Relationship/Subscription Tier Structure**.
   The **Member Relationship/Subscription Tier Structure** screen appears.
3. In the **Member Relationship/Subscription Tier Structure List** zone, click the **Duplicate** (⧉) icon in the **Duplicate** column *c*orresponding to the member relationship structure whose copy you want to create.

   The **Member Relationship/Subscription Tier Structure** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details about the member relationship structure. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Structure	Used to specify a code name for the structure. **Note:** You must specify a unique code name for the structure.	Not applicable
Description	Used to specify the description for the structure.	Yes
Detailed Description	Used to specify additional information about the structure.	No
Maximum Member Count	Used to specify the maximum number of members allowed in the structure. **Note:** If you do not specify the value, by default, it is set to zero (0).	No

   - **Member Relationship/Subscription Tier Criteria** - Used to specify the criteria details for the member relationship. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Member Relationship/ Subscription Tier	Used to specify a code name for the criteria. **Note:** You must specify a unique code name for the member relationship/subscription criteria.	No

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Field Name	Field Description	Mandatory (Yes or No)
Self	Used to specify the main subscriber for the member relationship. **Note:** The value for this field must be a positive integer.	No
Number of Spouses	Used to specify the total number of spouses in the membership who meet the member relationship criteria. **Note:** The value for this field must be a positive integer.	No
Number of Dependents	Used to specify the total number of dependents in the membership who meet the member relationship criteria. **Note:** The value for this field must be a positive integer.	No
Number of Young Adults	Used to specify the total number of young adults in the membership who meet the member relationship criteria. **Note:** The value for this field must be a positive integer.	No

Note:

You must specify at least one criteria for the member relationship structure. However, you can specify only a single member relationship criteria, if the maximum member count is set to zero (0) or one (1).

Relationship Matrix - Used to specify the relationship matrix for the member relationship. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Relation	Used to indicate an entity in the relationship matrix.	No
Relationship Type	Used to indicate how a member person is associated with the main subscriber using a relationship type.	No
Relationship	Used to indicate how the relation is associated with the relationship type in the relationship matrix	No

Note: You must specify at least one relationship matrix.

Tip: Alternatively, you can copy a member relationship structure by clicking the **Duplicate** button in the **Member Relationship/Subscription Tier Structure** zone.

4. Enter the required details in the **Main** section.
5. Define, edit, or remove a criteria (for the member relationship structure) in the **Member Relationship/Subscription Tier Criteria** section.

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6. If you want to define more than one criteria for the member relationship structure, click the **Add** (+) icon and then repeat step 5.

> **Note:** However, if you want to remove a criteria from the member relationship structure, click the **Delete** (🗑) icon corresponding to the **Member Relationship/Subscription Tier** field.

7. Define, edit, or remove the relationship matrix (for the member relationship structure) in the **Relationship Matrix** section.
8. If you want to define more than one relationship matrix for the member relationship structure, click the **Add** (+) icon and then repeat step 7.

> **Note:** However, if you want to remove a relationship matrix from the member relationship structure, click the **Delete** (🗑) icon corresponding to the **Relation** field.

9. Click **Save**.
   The new member relationship structure is created.

Related Topics

For more information on...	See...
Member Relationship/Subscription Tier Structure screen	Member Relationship/Subscription Tier Structure (Used for Searching) on page 69
Member Relationship/Subscription Tier Structure List zone	Member Relationship/Subscription Tier Structure List on page 69
Member Relationship/Subscription Tier Structure zone	Member Relationship/Subscription Tier Structure on page 70

Deleting a Member Relationship Structure

Procedure

To delete a member relationship structure:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **M** and then click **Member Relationship/Subscription Tier Structure**.
   A sub-menu appears.
3. Click the **Search** option from the **Member Relationship/Subscription Tier Structure** sub-menu.
   The **Member Relationship/Subscription Tier Structure** screen appears.
4. In the **Member Relationship/Subscription Tier Structure List** section, click the **Delete** (🗑) icon in the **Delete** column *c*orresponding to the member relationship structure that you want to delete.
   A message appears confirming whether you want to delete the member relationship structure.

> **Tip:** Alternatively, you can click the **Delete** button in the **Member Relationship/Subscription Tier Structure** zone to delete the member relationship structure.

5. Click **OK**.
   The member relationship structure is deleted.

Related Topics

For more information on...	See...
Member Relationship/Subscription Tier Structure screen	Member Relationship/Subscription Tier Structure (Used for Searching) on page 69
Member Relationship/Subscription Tier Structure List zone	Member Relationship/Subscription Tier Structure List on page 69

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For more information on...	See...
Member Relationship/Subscription Tier Structure zone	Member Relationship/Subscription Tier Structure on page 70

Viewing the Member Relationship Structure Details

Procedure

To view the details of the member relationship structure:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **M** and then click **Member Relationship/Subscription Tier Structure**.
   A sub-menu appears.
3. Click the **Search** option from the **Member Relationship/Subscription Tier Structure** sub-menu.
   The **Member Relationship/Subscription Tier Structure** screen appears.
4. In the **Member Relationship/Subscription Tier Structure List** zone, click the **Broadcast** (📡) icon corresponding to the structure column whose details you want to view.
   The **Member Relationship/Subscription Tier Structure** zone appears.
5. View the details of the member relationship structure in the **Member Relationship/Subscription Tier Structure** zone.

Related Topics

For more information on...	See...
Member Relationship/Subscription Tier Structure screen	Member Relationship/Subscription Tier Structure (Used for Searching) on page 69
Member Relationship/Subscription Tier Structure List zone	Member Relationship/Subscription Tier Structure List on page 69
Member Relationship/Subscription Tier Structure zone	Member Relationship/Subscription Tier Structure on page 70

Subscription Tier Pricing Parameter

Oracle Revenue Management and Billing enables you to use the subscription tier as a pricing parameter while defining the tier based pricing rules. This feature facilitates you to offer different rates for a price item based on different subscription tier.

On creating the bill period timelines, the system executes the **Derive Subscription Tier for Membership (C1-DERSUBTR)** algorithm attached to the **Account and Price Item Derivation Post-Processing** system event in the respective tier based pricing rule type. This algorithms determines the subscription tier of the membership for each bill period timeline. While determining the subscription tier for a membership, the system derives subscription tier for the membership from a subscription tier structure. Note that while deriving the subscription tier of a membership for a bill period timeline, the system refers the proration rules defined on the respective policy plan and accordingly derives the subscription tier for the membership. The system invokes the **C1-DERSUBTR** algorithm in the **C1-REPC1** batch.

You can define a subscription tier structure through a characteristic on the policy plan. While defining a subscription tier structure for a policy plan, you must use the characteristic type specified in the **Subscription Tier Structure Characteristic Type** attribute of a member relationship and subscription tier preference. The system considers the member relationship and subscription tier preference which is specified in the **Relation Structure Code Field Mapping** option type of the **C1-ASOBLLNG** feature configuration.

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A subscription tier structure helps the system to determine the subscription tier to which the membership belongs. You can specify a list of subscription tiers in a subscription tier structure. A subscription tier is derived for a membership depending on the following:

- Whether the member person is a self, spouse, or dependent
- Number of spouses, dependents, and young adults in the membership in the respective bill period timeline

A relationship matrix indicates whether a member person with a particular relationship type should be considered as self, spouse, or dependent while deriving the subscription tier. In a subscription tier structure, a spouse is never considered as a dependent. Only children are considered as dependents.

Let us understand this with the help of an example.

The following table illustrates the structure of a subscription tier named STEX1:

Subscription Tier	Self	Number of Spouses	Number of Dependents	Number of Young Adults
E	1	0	0	0
ES	1	1	0	0
ESC1	1	1	1	0
ESC2	1	1	2	0
EC1	1	0	1	0
EC2	1	0	2	0
EC3	1	0	3	0
F	1	9	9	9

Note: You can only define one subscription tier in a subscription tier structure where the sum of self, number of spouses, number of dependents, and number of young adults exceeds the maximum member count specified in the subscription tier structure.

In addition, you can create a relationship matrix for a subscription tier. Let us understand this with the help of an example.

The following table illustrates the relationship matrix defined for the STEX1 subscription tier:

Relation	Relationship Type	Relationship
Main Subscriber	Owner	Self
Main Subscriber	Member	Self
Children	Child	Dependent
Spouse	Wife	Spouse
Spouse	Spouse	Spouse

Once the subscription tier structure is derived from the policy plan, the system determines the subscription tier of the membership for the bill period timeline. While determining the subscription tier of a membership for the bill period timeline, the system derives the following characteristic types from the respective attributes of the member relationship and subscription tier preference:

- Age Calculation Date Basis
- Max Age Limit for Max Dependent Count
- Max Number of Dependents Order Priority
- Maximum Number of Dependents
- New Born Gift Days

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- New Born Gift Days Applicability
- Young Adult Max Age Limit
- Young Adult Max Age Limit Applicability

The system then derives these characteristics from the policy plan. Let us understand this with the help of an example.

The following table illustrates different member persons included in a membership that is defined for a policy plan:

Member Start Date	Member End Date	Person Name	Main Subscriber	Relationship Type	Member	Date of Birth
1-Jan-20	31-Dec-20	Mark	Yes	Self	Yes	15-Jan-68
1-Jan-20	31-Dec-20	Nancy	No	Wife	Yes	20-Apr-72
1-Jan-20	31-Dec-20	Roger	No	Child	Yes	15-May-01
1-Jan-20	31-Dec-20	Tom	No	Child	Yes	16-May-04

Now, if the following characteristics are defined on the policy plan:

- Subscription Tier Structure - STEX1
- Age Calculation Date Basis - Enrollment Date
- Maximum Number of Dependents - 3
- Max Number of Dependents Order Priority - ELDEST
- Max Age Limit for Max Dependent Count - 21
- New Born Gift Days - 30
- New Born Gift Days Applicability - Y
- Young Adult Max Age Limit - 25
- Young Adult Max Age Limit Applicability - Y

The system considers the STEX1 subscription tier structure and derives the subscription tier of the membership for each bill period timeline. Let us understand this with the help of an example.

The following table illustrates the subscription tier derived for the respective bill period timeline:

Bill Period Timeline	Characteristic Type	Characteristic Value
1-Jan-20 to 31-Jan-20	Subscription Tier	ESC2
1-Feb-20 to 29-Feb-20	Subscription Tier	ESC2
1-Mar-20 to 31-Mar-20	Subscription Tier	ESC2
1-Apr-20 to 30-Apr-20	Subscription Tier	ESC2
1-May-20 to 31-May-20	Subscription Tier	ESC2
1-Jun-20 to 30-Jun-20	Subscription Tier	ESC2
1-Jul-20 to 31-Jul-20	Subscription Tier	ESC2
1-Aug-20 to 31-Aug-20	Subscription Tier	ESC2
1-Sep-20 to 30-Sep-20	Subscription Tier	ESC2
1-Oct-20 to 31-Oct-20	Subscription Tier	ESC2
1-Nov-20 to 30-Nov-20	Subscription Tier	ESC2
1-Dec-20 to 31-Dec-20	Subscription Tier	ESC2

Because the characteristic value is same across all bill period timelines, the system will create one subscription tier characteristic with the effective date as 01-Jan-2020. Now, assume if one more member person named Harry with the

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date of birth as 05-11-08 and relationship type as Child is added to the membership on 05-Mar-20, then the system derives the subscription tier of the membership for each bill period timeline. Let us understand this with the help of an example.

The following table illustrates the subscription tier derived for the respective bill period timeline:

Bill Period Timeline	Characteristic Type	Characteristic Value
5-Mar-20 to 31-Mar-20	Subscription Tier	F
1-Apr-20 to 30-Apr-20	Subscription Tier	F
1-May-20 to 31-May-20	Subscription Tier	F
1-Jun-20 to 30-Jun-20	Subscription Tier	F
1-Jul-20 to 31-Jul-20	Subscription Tier	F
1-Aug-20 to 31-Aug-20	Subscription Tier	F
1-Sep-20 to 30-Sep-20	Subscription Tier	F
1-Oct-20 to 31-Oct-20	Subscription Tier	F
1-Nov-20 to 30-Nov-20	Subscription Tier	F
1-Dec-20 to 31-Dec-20	Subscription Tier	F

In this case, the system will have two subscription tier characteristics for the membership - one with the effective date as 01-Jan-2020 where the characteristic value is set to **ESC2** and another with the effective date as 05-Mar-2020 where the characteristic value is set to **F**.

If a new born is added to the membership, the effective date of the new subscription tier characteristic is calculated considering the gift days if applicable. If a member person is end dated, the system derives the subscription tier of the membership once again. If the subscription tier for the membership is different, the system creates a new characteristic to store the subscription tier for the membership. The effective date of the new characteristic is set according to the proration rule defined for the termination event. If a member person is inactivated, the system derives the subscription tier of the membership once again. In this case, if the subscription tier for the membership is different, the system updates the existing subscription tier characteristic of the membership.

To use the subscription tier as a pricing parameter, you need to define the Subscription Tier parameter where:

- **Value Type** is to **Adhoc**
- **Source Entity** is set to **Membership**
- **Source Type** is set to **Characteristic**
- **Source Type Code** is set to a characteristic type which is specified in the **Subscription Tier Characteristic Type** attribute of the member relationship and subscription tier preference
- **Parameter Usage** is set to **Price Item** and **Pricing Eligibility Criteria**

Once the Subscription Tier parameter is defined, you need to associate the parameter with the price items for which you want to define different rates in a pricing rule using the parameter. This helps to define different base fee for a price item based on the subscription tier.

A new screen named **Member Relationship/Subscription Tier Structure** is introduced in this release. It enables you to add, edit, copy, and delete the member relationship and subscription tier structures.

Prerequisites

To create a subscription tier pricing parameter, you need to do the following:

- Define the pricing parameter with the subscription tier.

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- The **Admin** user must define different types of subscription tiers, where all the tiers must be defined in the **Member Relationship/Subscription Tier Structure** screen. These subscription tiers must also exist in the **C1-ASOBLLNG** feature configuration.
- Define the required characteristic types, such as, **Subscription Tier Structure (C1-STRST)** and **Age Calculation Date Basis (C1-AGCAL)** on the policy plan.
- Define the following set of characteristics while adding the characteristics for the policy plan and also when the premium billing preferences are defined:
  - Max Age of Dependent
  - Max Number of Dependents
  - Order Priority
  - Young Adult Max Age Limit
  - Young Adult Inclusion Applicability
- The above characteristic types along with the **Subscription (C1-SUBST)** characteristic type would be stamped on member person, must be specified in the **Field Mapping** screen.

Related Topics

For more information on...	See...
Uploading a Geographic Rating Area File in the CSV Format	Uploading a Geographic Rating Area File in the CSV Format on page 54
CSV File Format for Uploading Geographic Rating Areas	CSV File Format for Uploading Geographic Rating Areas on page 55
Sample CSV Format for Uploading Geographic Rating Areas	Sample CSV Format for Uploading Geographic Rating Areas on page 56

Member Relationship/Subscription Tier Structure (Used for Searching)

The **Member Relationship/Subscription Tier Structure** screen allows you to search for a member relationship/subscription tier using various search criteria. It also allows you to create a member relationship/subscription tier. Through this screen, you can navigate to the following screen. It contains the following zone:

This screen consists of the following zone:

- Member Relationship/Subscription Tier Structure List on page 69
- Member Relationship/Subscription Tier Structure on page 70

Member Relationship/Subscription Tier Structure List

The **Member Relationship/Subscription Tier Structure List** zone displays the member relationship or subscription tier structure information. It contains the following columns:

Column Name	Column Description
Structure	Used to specify the structure code for the structure.
Description	Used to specify the description for the structure.
Edit	On clicking the **Edit** (✎) icon, the **Member Relationship/Subscription Tier Structure** screen appears where you can edit the structural details of the member relationship or subscription tier.
Duplicate	On clicking the **Duplicate** (⧉) icon, the **Member Relationship/Subscription Tier Structure** screen appears where you can define a new member relationship or subscription tier using an existing member relationship or subscription tier.

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Column Name	Column Description
Delete	On clicking the **Delete** (🗑) icon, you can delete the member relationship or subscription tier structure.

Note:

Pagination is used to display limited number of records in the **Search Results** section. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

You can filter the list using various search criteria (such as, **Structure** and **Description**) available in the **Filter** area. By default, the **Filter** area is hidden. You can view the **Filter** area by clicking the Filters (▽) icon in the upper right corner of this zone.

Related Topics

For more information on...	See...
How to view the details of a member relationship/subscription tier structure	Viewing the Subscription Tier Structure Details on page 92
How to define a member relationship/ subscription tier structure	Defining a Subscription Tier Structure on page 85

Member Relationship/Subscription Tier Structure

The **Member Relationship/Subscription Tier Structure** zone displays the details of the member relationship or subscription tier structure. It contains the following sections:

- **Main** - Displays basic information about the member relationship or subscription tier structure. It contains the following fields:

Field Name	Field Description
Structure	Displays the type of structure.
Description	Displays the description of the structure.
Detailed Description	Displays additional information about the structure.
Maximum Member Count	Displays the maximum count of the members allowed in the structure.

- **Member Relationship/Subscription Tier Criteria** - Lists the criteria details of the member relationship or subscription tier. It contains the following columns:

Column Name	Column Description
Member Relationship/ Subscription Tier	Displays the criteria code for the member relationship or subscription tier.
Self	Displays the main subscriber who meets the member relationship or subscription tier criteria. **Note:** The total count in the **Self** column cannot exceed more than one.
Number of Spouses	Displays the total number of spouses in the membership who meet the member person relationship criteria.
Number of Dependents	Displays the total number of dependents in the membership who meet the member person relationship criteria.

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Column Name	Column Description
Number of Young Adults	Displays the total number of young adults in the membership who meet the member person relationship criteria.

- **Relationship Matrix** - Lists the relationship matrix details defined for the member relationship or subscription tier structure. It contains the following columns:

Column Name	Column Description
Relation	Indicates an entity defined in the relationship matrix.
Relationship Type	Indicates how a member person is associated with the main subscriber using a relationship type.
Relationship	Indicates how a member person is associated with the relationship type.

- **Record Actions** - This section contains the following buttons:

Button Name	Button Description
Edit	Used to edit the structural details of the member relationship or subscription tier.
Delete	Used to delete the member relationship or subscription tier structure.
Duplicate	Used to create a new member relationship or subscription tier structure using an existing structure.

- **Record Information** - This section contains the following fields:

Field Name	Field Description
Business Object	Indicates the business object using which the member relationship or subscription tier structure is created. In addition, a context menu appears corresponding to this field which helps in navigating to other screens in the application.
	Note: It has a link. On clicking the link, the **Business Object** screen appears where you can view the details of the respective business object.

Related Topics

For more information on...	See...
How to edit a member relationship/ subscription tier structure	Editing a Subscription Tier Structure on page 87
How to delete a member relationship/subscription tier structure	Deleting a Subscription Tier Structure on page 92
How to copy a member relationship/ subscription tier structure	Copying a Subscription Tier Structure on page 89

Defining a Subscription Tier Structure

Procedure

To define a subscription tier structure:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **M** and then click **Member Relationship/Subscription Tier Structure**.
   A sub-menu appears.

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3. Click the **Add** option from the **Member Relationship/Subscription Tier Structure** sub-menu.

   The **Member Relationship/Subscription Tier Structure** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details about the subscription tier structure. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Structure	Used to specify a code name for the structure. **Note:** You must specify a unique code name for the structure.	Yes
Description	Used to specify the description for the structure.	Yes
Detailed Description	Used to specify additional information about the structure.	No
Maximum Member Count	Used to specify the maximum number of members allowed in the structure. **Note:** If you do not specify the value, by default, it is set to zero (0).	No

   - **Member Relationship/Subscription Tier Criteria** - Used to specify a criteria for the subscription tier. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Member Relationship/ Subscription Tier	Used to specify a code name for the criteria. **Note:** You must specify a unique code name for the subscription tier criteria.	No
Self	Used to specify the main subscriber for the subscription tier. **Note:** The value for this field must be a positive integer.	No
Number of Spouses	Used to specify the total number of spouses in the membership who meet the subscription tier criteria. **Note:** The value for this field must be a positive integer.	No
Number of Dependents	Used to specify the total number of dependents in the membership who meet the subscription tier criteria. **Note:** The value for this field must be a positive integer.	No
Number of Young Adults	Used to specify the total number of young adults in the membership who meet the subscription tier criteria. **Note:** The value for this field must be a positive integer.	No

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> **Note:** You must specify at least one criteria for the subscription tier structure. However, you can specify only a single subscription tier criteria, if the maximum member count is set to zero (0) or one (1).

Relationship Matrix - Used to specify the relationship matrix for the subscription tier. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Relation	Used to indicate an entity in the relationship matrix.	No
Relationship Type	Used to indicate how a member person is associated with the main subscriber using a relationship type.	No
Relationship	Used to indicate how the relation is associated with the relationship type in the relationship matrix	No

> **Note:** You must specify at least one relationship matrix.

> **Tip:** Alternatively, you can access this screen by clicking the **Add** button in the **Page Title** area of the **Member Relationship/Subscription Tier Structure** screen.

4. Enter the required details in the **Main** section.
5. Define a criteria (for the subscription tier structure) in the **Member Relationship/Subscription Tier Criteria** section.
6. If you want to define more than one criteria for the subscription tier structure, click the **Add** (+) icon and then repeat step 5.

> **Note:** However, if you want to remove a criteria from the subscription tier structure, click the **Delete** (🗑) icon corresponding to the **Member Relationship/Subscription Tier** field.

7. Define a relationship matrix (for the subscription tier structure) in the **Relationship Matrix** section.
8. If you want to define more than one relationship matrix for the subscription tier structure, click the **Add** (+) icon and then repeat step 7.

> **Note:** However, if you want to remove a relationship matrix from the subscription tier structure, click the **Delete** (🗑) icon corresponding to the **Relation** field.

9. Click **Save**.
   The subscription tier structure is defined.

Related Topics

For more information on...	See...
Member Relationship/Subscription Tier Structure screen	Member Relationship/Subscription Tier Structure (Used for Searching) on page 69

Editing a Subscription Tier Structure

Procedure

To edit a subscription tier structure:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **M** and then click **Member Relationship/Subscription Tier Structure**.
   The **Member Relationship/Subscription Tier Structure** screen appears.

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3. In the **Member Relationship/Subscription Tier Structure List** zone, click the **Edit** (✎) icon in the **Edit** column corresponding to the subscription tier structure whose details you want to edit.

   The **Member Relationship/Subscription Tier Structure** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details about the subscription tier structure. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Structure	Displays the subscription tier structure name.	Not applicable
Description	Used to specify the description for the structure.	Yes
Detailed Description	Used to specify additional information about the structure.	No
Maximum Member Count	Used to specify the maximum number of members allowed in the structure. **Note:** If you do not specify the value, by default, it is set to zero (0).	No

   - **Member Relationship/Subscription Tier Criteria** - Used to specify a criteria for the subscription tier. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Member Relationship/ Subscription Tier	Used to specify a code name for the criteria. **Note:** You must specify a unique code name for the criteria.	No
Self	Used to specify the main subscriber for the subscription tier. **Note:** The value for this field must be a positive integer.	No
Number of Spouses	Used to specify the total number of spouses in the membership who meet the subscription tier criteria. **Note:** The value for this field must be a positive integer.	No
Number of Dependents	Used to specify the total number of dependents in the membership who meet the subscription tier criteria. **Note:** The value for this field must be a positive integer.	No
Number of Young Adults	Used to specify the total number of young adults in the membership who meet the subscription tier criteria. **Note:** The value for this field must be a positive integer.	No

   Note:

   You must specify at least one criteria for the subscription tier structure. However, you can specify only a single subscription tier criteria, if the maximum member count is set to zero (0) or one (1).

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Relationship Matrix - Used to specify a relationship matrix for the subscription tier. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Relation	Used to indicate an entity in the relationship matrix.	No
Relationship Type	Used to indicate how a member person is associated with the main subscriber using a relationship type.	No
Relationship	Used to indicate how the relation is associated with the relationship type in the relationship matrix.	No

Note: You must specify at least one relationship matrix.

Tip: Alternatively, you can edit the details of a member relationship structure by clicking the **Edit** button in the **Member Relationship/Subscription Tier Structure** zone.

4. Modify the details in the **Main** section.
5. Define, edit, or remove a criteria (for the subscription tier structure) in the **Member Relationship/Subscription Tier Criteria** section.
6. If you want to define more than one criteria for the subscription tier structure, click the **Add** (+) icon and then repeat step 5.

Note: However, if you want to remove a criteria from the subscription tier structure, click the **Delete** (🗑) icon corresponding to the **Member Relationship/Subscription Tier** field.

7. Define, edit, or remove a relationship matrix (for the subscription tier structure) in the **Relationship Matrix** section.
8. If you want to define more than one relationship matrix for the subscription tier structure, click the **Add** (+) icon and then repeat step 7.

Note: However, if you want to remove a relationship matrix from the subscription tier structure, click the **Delete** (🗑) icon corresponding to the **Relation** field.

9. Click **Save**.
   The changes made to the subscription tier structure are saved.

Related Topics

For more information on...	See...
Member Relationship/Subscription Tier Structure screen	Member Relationship/Subscription Tier Structure (Used for Searching) on page 69
Member Relationship/Subscription Tier Structure List zone	Member Relationship/Subscription Tier Structure List on page 69
Member Relationship/Subscription Tier Structure zone	Member Relationship/Subscription Tier Structure on page 70

Copying a Subscription Tier Structure

Procedure

To copy a subscription tier structure:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **M** and then click **Member Relationship/Subscription Tier Structure**.

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The **Member Relationship/Subscription Tier Structure** screen appears.

3. In the **Member Relationship/Subscription Tier Structure List** zone, click the **Duplicate** (⧉) icon in the **Duplicate** column *c*orresponding to the subscription tier structure whose copy you want to create.

   The **Member Relationship/Subscription Tier Structure** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details about the subscription tier structure. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Structure	Used to specify a code name for the structure. **Note:** You must specify a unique code name for the structure.	Not applicable
Description	Used to specify the description for the structure.	Yes
Detailed Description	Used to specify additional information about the structure.	No
Maximum Member Count	Used to specify the maximum number of members allowed in the structure. **Note:** If you do not specify the value, by default, it is set to zero (0).	No

   - **Member Relationship/Subscription Tier Criteria** - Used to specify the criteria details for the subscription tier. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Member Relationship/ Subscription Tier	Used to specify a code name for the criteria. **Note:** You must specify a unique code name for the member relationship/subscription criteria.	No
Self	Used to specify the main subscriber for the subscription tier. **Note:** The value for this field must be a positive integer.	No
Number of Spouses	Used to specify the total number of spouses in the membership who meet the subscription tier criteria. **Note:** The value for this field must be a positive integer.	No
Number of Dependents	Used to specify the total number of dependents in the membership who meet the subscription tier criteria. **Note:** The value for this field must be a positive integer.	No
Number of Young Adults	Used to specify the total number of young adults in the membership who meet the subscription tier criteria. **Note:** The value for this field must be a positive integer.	No

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> **Note:**
>
> You must specify at least one criteria for the subscription tier structure. However, you can specify only a single subscription tier criteria, if the maximum member count is set to zero (0) or one (1).

Relationship Matrix - Used to specify the relationship matrix for the subscription tier. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Relation	Used to indicate an entity in the relationship matrix.	No
Relationship Type	Used to indicate how a member person is associated with the main subscriber using a relationship type.	No
Relationship	Used to indicate how the relation is associated with the relationship type in the relationship matrix	No

> **Note:** You must specify at least one relationship matrix.

> **Tip:** Alternatively, you can copy a member relationship structure by clicking the **Duplicate** button in the **Member Relationship/Subscription Tier Structure** zone.

4. Enter the required details in the **Main** section.
5. Define, edit, or remove a criteria (for the subscription tier structure) in the **Member Relationship/Subscription Tier Criteria** section.
6. If you want to define more than one criteria for the subscription tier structure, click the **Add** (+) icon and then repeat step 5.

> **Note:** However, if you want to remove a criteria from the subscription tier structure, click the **Delete** (🗑) icon corresponding to the **Member Relationship/Subscription Tier** field.

7. Define, edit, or remove the relationship matrix (for the subscription tier structure) in the **Relationship Matrix** section.
8. If you want to define more than one relationship matrix for the subscription tier structure, click the **Add** (+) icon and then repeat step 7.

> **Note:** However, if you want to remove a relationship matrix from the subscription tier structure, click the **Delete** (🗑) icon corresponding to the **Relation** field.

9. Click **Save**.
   The new subscription tier structure is created.

Related Topics

For more information on...	See...
Member Relationship/Subscription Tier Structure screen	Member Relationship/Subscription Tier Structure (Used for Searching) on page 69
Member Relationship/Subscription Tier Structure List zone	Member Relationship/Subscription Tier Structure List on page 69
Member Relationship/Subscription Tier Structure zone	Member Relationship/Subscription Tier Structure on page 70

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Deleting a Subscription Tier Structure

Procedure

To delete a subscription tier structure:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **M** and then click **Member Relationship/Subscription Tier Structure**.
   A sub-menu appears.
3. Click the **Search** option from the **Member Relationship/Subscription Tier Structure** sub-menu.
   The **Member Relationship/Subscription Tier Structure** screen appears.
4. In the **Member Relationship/Subscription Tier Structure List** section, click the **Delete** (🗑) icon in the **Delete** column corresponding to the subscription tier structure that you want to delete.
   A message appears confirming whether you want to delete the subscription tier structure.

> **Tip:** Alternatively, you can click the **Delete** button in the **Member Relationship/Subscription Tier Structure** zone to delete the subscription tier structure.

5. Click **OK**.
   The subscription tier structure is deleted.

Related Topics

For more information on...	See...
Member Relationship/Subscription Tier Structure screen	Member Relationship/Subscription Tier Structure (Used for Searching) on page 69
Member Relationship/Subscription Tier Structure List zone	Member Relationship/Subscription Tier Structure List on page 69
Member Relationship/Subscription Tier Structure zone	Member Relationship/Subscription Tier Structure on page 70

Viewing the Subscription Tier Structure Details

Procedure

To view the details of the subscription tier structure:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **M** and then click **Member Relationship/Subscription Tier Structure**.
   A sub-menu appears.
3. Click the **Search** option from the **Member Relationship/Subscription Tier Structure** sub-menu.
   The **Member Relationship/Subscription Tier Structure** screen appears.
4. In the **Member Relationship/Subscription Tier Structure List** zone, click the **Broadcast** (📡) icon corresponding to the structure column whose details you want to view.
   The **Member Relationship/Subscription Tier Structure** zone appears.
5. View the details of the subscription tier structure in the **Member Relationship/Subscription Tier Structure** zone.

Related Topics

For more information on...	See...
Member Relationship/Subscription Tier Structure screen	Member Relationship/Subscription Tier Structure (Used for Searching) on page 69

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For more information on...	See...
Member Relationship/Subscription Tier Structure List zone	Member Relationship/Subscription Tier Structure List on page 69
Member Relationship/Subscription Tier Structure zone	Member Relationship/Subscription Tier Structure on page 70

Membership Benefits

Oracle Revenue Management and Billing enables you to maintain the following types of membership benefits for the fully-insured group and individual businesses:

- Medicare benefits, such as, Part A, Part B, Part D for which premium is calculated using the age-based or tier-based pricing rules
- Medicare benefits, such as Medicare Part D Low-Income Subsidy (LIS) and Medicare Part D Late Enrollment Penalty (LEP) for which charges are calculated using the benefit pricing rule type
- Advance Premium Tax Credit (APTC) benefits for which charges are calculated using the benefit pricing rule type

In addition, it enables you to setup the following Medicare membership benefits for the fully insured individual business:

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

The system enables you to define a benefit at the membership level and not at the member person level. This is because the system assumes the following:

- There will be only one member person in the Medicare membership who will avail the Membership benefit.
- The other benefits such as APTC would be availed by all member persons of the group or individual membership.

Benefit Status Transition

The following figure graphically indicates how a membership benefit moves from one status to another in its lifecycle:

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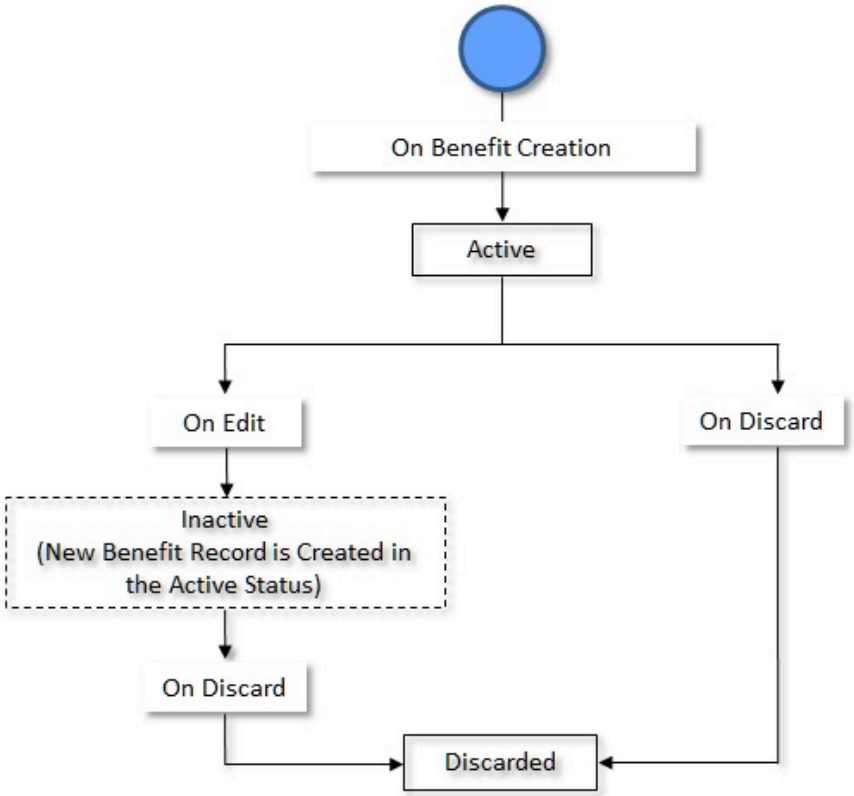

Membership Benefits (Such as Medicare, APTC, and Others)

The system enables you to define and edit the membership benefits from the user interface (i.e. through the **Benefit** screen), through a health care inbound message, or through the membership repricing inbound web service. While defining a membership benefit, you need to specify the following details:

- The date range for which the benefit is availed for the membership.
- The source (i.e. health insurance exchange) from where the benefit is received for the membership. The valid values are:
  - Centers for Medicare and Medicaid Services
  - State
- The type of benefit availed for the membership. The valid values are:
  - Commercial
  - Medicare Affiliated
- The benefit sub type that indicates whether the membership benefit is a Medicare Part A, Part B, or Part D benefit, Medicare Part D LIS, Medicare Part D LEP, APTC benefit, or any other membership benefit.
- The Medicare plan benefit package (i.e. 800 series plan) which is applicable for Medicare Part A, Part B, or Part D membership benefit.

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> **Note:** You can define an Employer Group Waiver Plan (EGWP) (i.e. 800 series plan) as a Medicare plan benefit package in the system. While defining a Medicare Part A, Part B, or Part D membership benefit, you need to indicate the Medicare plan benefit package which is applicable for the membership benefit. You can then use the Medicare plan benefit package as a pricing parameter in the age-based or tier-based pricing rules using which the Medicare Part A, Part B, or Part D membership premium is calculated. In this way, the system enables you to offer different pricing for different EGWPs (i.e. 800 series plans).

The system enables you to define, edit, delete, and copy a Medicare plan benefit package through the **Field Mapping** screen. For more information, refer to Medicare Plan Benefit Package on page 136.

- The pass-through amount for Medicare Part D LIS, Medicare Part D LEP or other benefits such as APTC.

Once the membership benefit is created, the status of the benefit is set to **Active**. You can also edit a membership benefit from the user interface (i.e. through the **Benefit** screen), through a health care inbound message, or through the membership repricing inbound web service. On editing a membership benefit, the system inactivates the old record and creates a new record in the system. The status of the old benefit record is set to **Inactive** and the status of the new benefit record is set to **Active**.

The system also enables you to discard an active or inactive membership benefit from the user interface by clicking the **Discard** button or by changing its status through a health care inbound message or through the membership repricing inbound web service.

For more information on how to maintain the membership benefits through the **Benefit** screen, refer to Benefit (Used for Searching) on page 113. For more information on how to maintain the membership benefits through a health care inbound message, refer to Health Care Inbound Message on page 2274. For more information on how to maintain the membership benefits through the membership repricing inbound web service, refer to C1-MembershipRepricing Business Service on page 3514.

Membership Benefit Sub Type

You can create a membership benefit using the respective benefit sub type. Therefore, you need to create an appropriate benefit sub type for the following:

- **Medicare Part A, Part B, or Part D** - While creating a benefit sub type for Medicare Part A, Part B, or Part D membership benefits, you need to set the value type to **Not applicable**.
- **Medicare Part D LIS** - While creating a benefit sub type for Medicare Part D LIS, you need to set the value type to **Flat** and ensure that the **Charge Negatively** option is selected.
- **Medicare Part D LEP** - While creating a benefit sub type for Medicare Part D LEP, you need to set the value type to **Flat** and ensure that the **Charge Negatively** option is not selected.
- **APTC or Any Other Benefits** - While creating a benefit sub type for APTC or any other benefits, you need to set the value type to **Flat** and ensure that the **Charge Negatively** option is selected.

The **Charge Negatively** option indicates that you want to create a negative charge for the benefit amount. The system will then accordingly deduct the negative charge from the membership premium while billing.

The system also enables you to create the reverse membership benefit charges on the benefit sponsor account (i.e. for the health benefit exchange; for example, CMS or State account who has offered the membership benefit). If you want to create the reverse membership benefit charges on the benefit sponsor account, you need to select the **Charge Benefit Sponsor** option and specify the benefit sponsor account while defining the benefit sub type. The system will then create a reverse charge on the membership benefit sponsor account. The reverse charge can then be used by the health insurance payer for reconciliation.

In the individual health insurance business, the benefit sponsor account for the membership benefits varies depending on the health benefit exchange through which the benefit is availed. Therefore, there arises a need to derive the benefit sponsor account for each individual membership. The system also provides the ability to derive the benefit sponsor account for the respective health benefit exchange. You can attach an algorithm to the **Sponsor Account Derivation Algorithm** field which will derive the benefit sponsor account for the respective health benefit exchange. The system will then create a reverse charge on the derived membership benefit sponsor account.

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

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

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

Note: If the **Charge Benefit Sponsor** option is selected while defining or editing a benefit sub type, you must either specify the benefit sponsor account or sponsor account derivation algorithm in the benefit sub type.

Algorithms Used in C1-Benefits

The following table lists the algorithms which are attached to the **C1-Benefits** business object:

System Event	Algorithm	Algorithm Type	Description
Audit	C1-FIAUDEV	C1-FIAUDEV	Refer to C1-FIAUDEV on page 96.
Post Processing	C1-BENP	C1-BENP	Refer to C1-BENP on page 97
Validation	C1-BENVAL	C1-BENVAL	Refer to C1-BENVAL on page 97

C1-FIAUDEV

If this algorithm is attached to the **Audit** system event of the **Group Membership** (**C1-Membership**), **Individual Membership** (**C1-IndMembership**), **Benefit** (**C1-Benefits**), and **Person** (**C1_PERSON_BO**) business objects, it is invoked whenever you define, edit, or delete the respective entity. It checks whether an active audit event type exists for the entity business object. If so, it considers the active audit event type and creates the audit event using the respective audit event type. The system creates the audit event whenever a group membership is added to a policy plan, an individual membership is added to a health plan, member person is added to a group or individual membership, and a membership benefit is added for a group or individual membership. It also creates the audit event whenever the group or individual membership, member person, and membership benefit details are updated. However, note that the audit events are created in the update scenario when the element listed for auditing in the age-based, tier-based, or benefit pricing rule type is updated. The system considers only those pricing rule types whose pricing rules are effective during the respective entity (i.e. group or individual membership, member person, or membership benefit whichever is updated) date range.

It creates one or more audit events in the **Pending** status. The entity type and entity ID for which an audit event is created are added corresponding to the audit event in the **C1_AUDIT_EVENT** table. In addition, the effective date is stamped corresponding to the audit event in the **C1_AUDIT_EVENT** table.

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Note:

The system creates an audit event whenever the group or individual membership start and end dates and member person's start and end dates are changed in the system irrespective of whether these fields are listed for auditing or not in the age-based or tier-based pricing rule types.

Before creating an audit event, the system checks whether an audit event for the entity ID with the same effective date already exists in the **Pending** or **Error** status for the respective action. If so, the system does not create a new audit event for the entity. Instead, the system adds a new log entry in the existing audit event.

For each audit event, this algorithm derives the group or individual memberships on the policy or health plan, respectively, which is impacted and the pricing rule types whose pricing rules are defined on the respective policy or health plan. A repricing entity detail record is then created for each membership, pricing rule type, and effective date combination in the **CI_REPRC_ENTITY_DTL** table. The status of the repricing entity detail record is set to **Pending**. Once the repricing entity detail records are created successfully, the status of the audit event is changed to **Complete**.

It contains the following parameters:

- **Audit Event Business Object** - Used to specify the business object using which you want to create the audit event.
- **Audit Event Pending Status** - Used to specify the status in which you want to create the audit event. This parameter is also used for determining whether an audit event for the entity ID already exists in the system.
- **Audit Event Error Status** - Used to specify the status in which an audit event is transitioned when an error occurs while processing the audit event. This parameter is used for determining whether an audit event for the entity ID already exists in the system.

All the above parameters are mandatory.

Related Topics

For more information on...	See...
How the audit events are created and processed for an age based or tier based pricing rule	Age Based and Tier Based Pricing Rules Audit Process on page 3467
How the audit events are created and processed for a membership	Membership Audit Process on page 3468
How the audit events are created and processed for a person	Person Audit Process on page 3472
How the audit events are created and processed for a membership benefit	Membership Benefit Audit Process on page 3474

C1-BENP

This algorithm creates a log entry whenever the benefit amount or benefit end date of a membership benefit is updated. The log entry stores the old and new values of the benefit amount and the benefit end date (whichever is updated).

C1-BENVAL

This algorithm validates a membership benefit. It checks the following:

- Whether the membership benefit end date is not earlier than the membership benefit start date.
- Whether the membership details are specified while defining a membership benefit.
- Whether the benefit amount is specified in the membership benefit when the value type is set to **FLAT** in the respective benefit sub type.
- Whether the Medicare plan benefit package is specified in the membership benefit when the value type is set to **Not applicable** in the respective benefit sub type.

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While editing a membership benefit, this algorithm only allows you to edit the following information:

- Benefit Amount
- Benefit End Date
- Benefit Status
- Benefit Characteristics

Benefit Sub Type

The **Benefit Sub Type** screen enables you to create, edit, delete, and copy a benefit sub type. It contains the following zones:

- Benefit Sub Type List on page 98
- Benefit Sub Type on page 99

For more information on...	**See...**
Benefit Sub Type List zone	Benefit Sub Type List on page 98
Benefit Sub Type zone	Benefit Sub Type on page 99
How to define a benefit sub type	Defining a Benefit Sub Type on page 101
How to edit a benefit sub type	Editing a Benefit Sub Type on page 105
How to copy a benefit sub type	Copying a Benefit Sub Type on page 109
How to delete a benefit sub type	Deleting a Benefit Sub Type on page 112
How to view the details of a benefit sub type	Viewing the Details of a Benefit Sub Type on page 112

Benefit Sub Type List

The **Benefit Sub Type List** zone lists the benefit sub types that are already defined in the system. It contains the following columns:

Column Name	**Column Description**
Benefit Sub Type	Displays the benefit sub type.
Description	Displays the description of the benefit sub type.
Status	Indicates the status of the benefit sub type. The valid values are: • Active • Inactive
Value Type	Indicates the type of value that you want to store in the benefit sub type. The valid values are: • Flat • NA
Edit	On clicking the **Edit** ( ) icon, the **Benefit Sub Type** screen appears where you can edit the details of the benefit sub type. **Note:** The **Edit** icon appears only when the benefit sub type is not yet used.
Duplicate	On clicking the **Duplicate** ( ) icon, the **Benefit Sub Type** screen appears where you can define a benefit sub type using an existing benefit sub type.

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Column Name	Column Description
Delete	On clicking the **Delete** ( ) icon, you can delete a benefit sub type.

You can filter the list using various search criteria (such as **Benefit Sub Type**, **Status**, **Description**, **Value Type**, **Reconciliation Required**, **Price**, and **Validate**) available in the **Filter** area. By default, the **Filter** area is hidden. You can view the **Filter** area by clicking the **Filter** ( ) icon in the upper right corner of this zone.

On clicking the **Broadcast** ( ) icon corresponding to the benefit sub type, the **Benefit Sub Type** zone appears with the details of the respective benefit sub type.

Note: Pagination is used to display limited number of records in this zone. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

Related Topics

For more information on...	See...
Benefit Sub Type zone	Benefit Sub Type on page 99
How to edit a benefit sub type	Editing a Benefit Sub Type on page 105
How to copy a benefit sub type	Copying a Benefit Sub Type on page 109
How to delete a benefit sub type	Deleting a Benefit Sub Type on page 112
How to view the details of a benefit sub type	Viewing the Details of a Benefit Sub Type on page 112

Benefit Sub Type

The **Benefit Sub Type** zone displays the details of the benefit sub type. It contains the following sections:

- **Main** - Displays the basic information about the benefit sub type. It contains the following fields:

Field Name	Field Description
Benefit Sub Type	Displays the benefit sub type.
Description	Displays the description of the benefit sub type.
Status	Indicates the status of the benefit sub type. The valid values are: • **Active** • **Inactive**
Value Type	Indicates whether the benefit amount should be a flat or calculated amount. The valid values are: • **Flat** - Used when you want to specify the pass-through amount while creating a membership benefit for Medicare Part D LIS, Medicare Part D LEP, APTC, etc. • **Not Applicable** - Used when you to want the system to calculate the benefit amount for the availed Medicare Part A, Part B, or Part D membership benefit.
Externally Priced	Indicates whether the benefit amount is calculated in the enrollment system. **Note:** This field appears when **Flat** option is selected from the **Value Type** list.
Validate External Price	Indicates that you want to validate whether the externally calculated benefit amount is within the threshold range.

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Field Name	Field Description
	Note: This field appears when the **Externally Priced** option is selected.
Validate Price Item	Indicates the price item using which you want to create the membership benefit charge for validation.
	Note: It has a link. On clicking the link, the **Price Item** screen appears where you can view the details of the respective price item. This field appears when the **Validate External Price** option is selected.
Charge Negatively	Indicates whether you want to create a negative charge for the benefit amount.
	Note: This field appears when the **Flat** option is selected from the **Value Type** list and the **Externally Priced** option is not selected.
Benefit SQI	Indicates the SQI using which you want to create an SQI based billable charge for the membership benefit. If you do not specify the value, the system will derive the SQI from the **Proration SQI** option type of the **C1-ASOBLLNG** feature configuration.
	Note: This field appears when the **Flat** option is selected from the **Value Type** list and the **Externally Priced** option is not selected.
Charge Benefit Sponsor	Indicates whether you want to create a reverse charge for the benefit sponsor. The reverse charge can then be used by the health insurance payer for reconciliation.
	Note: This field appears when **Flat** option is selected from the **Value Type** list and the **Externally Priced** option is not selected.
Benefit Sponsor Account	Indicates the account of sponsor on which you want to create the reverse charge.
	Note: This field appears when the **Charge Benefit Sponsor** option is selected.
Sponsor Account Derivation Algorithm	Indicates an algorithm using which the system can derive the sponsor account for the individual membership. The **C1-SPONSAC** algorithm is shipped with the product. For more information about the algorithm, refer to Membership Benefit Sub Type on page 95.
	Note: It has a link. On clicking the link, the **Algorithm** screen appears where you can view the details of the respective algorithm. This field appears when the **Charge Benefit Sponsor** option is selected.
Benefit Sponsor Price Item	Indicates the price item using which you want to create the reverse charge.
	Note: This field appears when the **Charge Benefit Sponsor** option is selected.
Benefit Sponsor SQI	Indicates the SQI using which you want to create a reverse SQI based billable charge for the benefit sponsor. If you do not specify the value, the system will derive the SQI from the **Proration SQI** option type of the **C1-ASOBLLNG** feature configuration.

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Field Name	Field Description
	Note: This field appears when the **Charge Benefit Sponsor** option is selected.

- **Characteristics** - Lists the characteristics defined for the benefit sub type. It contains the following columns:

Column Name	Column Description
Characteristic Type	Indicates the characteristic type.
Characteristic Value	Displays the value of the characteristic type.

- **Record Actions** - This section contains the following buttons:

Button Name	Button Description
Edit	Used to edit the details of the benefit sub type.
	Note: The **Edit** button appears only when the benefit sub type is not yet used.
Delete	Used to delete the benefit sub type.
Duplicate	Used to create a new benefit sub type using an existing benefit sub type.

- **Record Information** - This section contains the following fields:

Field Name	Field Description
Business Object	Indicates the business object using which the benefit sub type is created in the system. In addition, a context menu appears corresponding to this field which helps in navigating to other screens in the application.
	Note: It has a link. On clicking the link, the **Business Object** screen appears where you can view the details of the respective business object.

By default, the **Benefit Sub Type** zone does not appear in the **Benefit Sub Type** screen. It appears only when you click the**Broadcast** ( ) icon corresponding to a benefit sub type in the **Benefit Sub Type List** zone.

Related Topics

For more information on...	See...
How to edit a benefit sub type	Editing a Benefit Sub Type on page 105
How to copy a benefit sub type	Copying a Benefit Sub Type on page 109
How to delete a benefit sub type	Deleting a Benefit Sub Type on page 112
How to view the details of a benefit sub type	Viewing the Details of a Benefit Sub Type on page 112

Defining a Benefit Sub Type

Prerequisites

To define a benefit sub type, you should have:

- Value defined for the **Proration SQI** option type in the **C1-ASOBLLNG** feature configuration.
- Required price items and SQIs defined in the application.
- Sponsor account defined in the application.

Procedure

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To define a benefit sub type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **B** and then click **Benefit Sub Type**.
   A sub-menu appears.
3. Click the **Add** option from the **Benefit Sub Type** sub-menu.

   The **Benefit Sub Type** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details about the benefit sub type. It contains the following fields:

Field Name	**Field Description**	**Mandatory (Yes or No)**
Benefit Sub Type	Used to specify the benefit sub type.	Yes
Description	Used to specify the description for the benefit sub type.	Yes
Status	Used to indicate the status of the benefit sub type. • **Active** • **Inactive**	Yes
Value Type	Used to indicate whether the benefit amount should be a flat or calculated amount. The valid values are: • **Flat** - Used when you want to specify the pass-through amount while creating a membership benefit for Medicare Part D LIS, Medicare Part D LEP, APTC, etc. • **Not Applicable** - Used when you to want the system to calculate the benefit amount for the availed Medicare Part A, Part B, or Part D membership benefit.	Yes
Externally Priced	Used to indicate whether the benefit amount is calculated in the enrollment system. **Note:** This field appears when **Flat** option is selected from the **Value Type** list.	No
Validate External Price	Used when you want to validate whether the externally calculated benefit amount is within the threshold range. **Note:** This field appears when the **Externally Priced** option is selected.	No
Validate Price Item	Used to indicate the price item using which you want to create the membership benefit charge for validation. **Note:** The **Search** (🔍) icon appears corresponding to the **Validate Price Item** field. On clicking the **Search** icon, the **Search** window appears. This field appears when the **Validate External Price** option is selected.	Yes (Conditional) **Note:** This field is required when the **Validate External Price** option is selected.
Charge Negatively	Used to indicate whether you want to create a negative charge for the benefit amount.	No

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Field Name	Field Description	Mandatory (Yes or No)
	Note: This field appears when the **Flat** option is selected from the **Value Type** list and the **Externally Priced** option is not selected.	
Benefit SQI	Used to specify the SQI using which you want to create an SQI based billable charge for the membership benefit. If you do not specify the value, the system will derive the SQI from the **Proration SQI** option type of the **C1-ASOBLLNG** feature configuration. **Note:** This field appears when the **Flat** option is selected from the **Value Type** list and the **Externally Priced** option is not selected.	No
Charge Benefit Sponsor	Used to indicate whether you want to create a reverse charge for the benefit sponsor. The reverse charge can then be used by the health insurance payer for reconciliation. **Note:** This field appears when **Flat** option is selected from the **Value Type** list and the **Externally Priced** option is not selected.	No
Benefit Sponsor Account	Used to indicate the account of sponsor on which you want to create the reverse charge. **Note:** The **Search** (🔍) icon appears corresponding to the **Benefit Sponsor Account** field. On clicking the **Search** icon, the **Search** window appears. On specifying the benefit sponsor amount, the description of the benefit sponsor amount appears corresponding to the **Benefit Sponsor Account** field. This field appears when the **Charge Benefit Sponsor** option is selected.	Yes (Conditional) **Note:** This field is required when the **Charge Benefit Sponsor** option is selected and the value is not specified in the **Sponsor Account Derivation Algorithm** field.
Sponsor Account Derivation Algorithm	Used to attach an algorithm using which the system can derive the sponsor account for the individual membership. The **C1-SPONSAC** algorithm is shipped with the product.	Yes (Conditional)

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Field Name	Field Description	Mandatory (Yes or No)
	For more information about the algorithm, refer to Membership Benefit Sub Type on page 95. **Note:** The **Search** (🔍) icon appears corresponding to the **Sponsor Account Derivation Algorithm** field. On clicking the **Search** icon, the **Search** window appears. On specifying the sponsor account derivation algorithm, the description of the sponsor account derivation algorithm appears corresponding to the **Sponsor Account Derivation Algorithm** field. This field appears when the **Charge Benefit Sponsor** option is selected.	**Note:** This field is required when the **Charge Benefit Sponsor** option is selected.
Benefit Sponsor Price Item	Used to indicate the price item using which you want to create the reverse charge. **Note:** The **Search** (🔍) icon appears corresponding to the **Benefit Sponsor Price Item** field. On clicking the **Search** icon, the **Search** window appears. This field appears when the **Charge Benefit Sponsor** option is selected.	Yes (Conditional) **Note:** This field is required when the **Charge Benefit Sponsor** option is selected.
Benefit Sponsor SQI	Used to specify the SQI using which you want to create a reverse SQI based billable charge for the benefit sponsor. If you do not specify the value, the system will derive the SQI from the **Proration SQI** option type of the **C1-ASOBLLNG** feature configuration. **Note:** This field appears when the **Charge Benefit Sponsor** option is selected.	No

Note: If the **Charge Benefit Sponsor** option is selected, you need to specify the value in either the **Benefit Sponsor Account** or **Sponsor Account Derivation Algorithm** field.

Tip: Alternatively, you can access the **Benefit Sub Type** screen by clicking the **Add** button in the **Page Title** area of the **Benefit Sub Type** screen.

4. Enter the required details in the **Main** section.
5. Click **Save**.
   The benefit sub type is defined.

Related Topics

For more information on...	See...
Benefit Sub Type screen	Benefit Sub Type on page 98

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For more information on...	See...
How to define a characteristic for a benefit sub type	Defining a Characteristic for a Benefit Sub Type on page 105

Defining a Characteristic for a Benefit Sub Type

To define a characteristic for a benefit sub type, you should have:

- Characteristic types defined in the application (where the characteristic entity is set to **Benefit Sub Type**)

Procedure

To define a characteristic for a benefit sub type:

1. Ensure that the **Characteristics** section is expanded when you are defining, editing, or copying a benefit *s*ub type.

   The **Characteristics** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Characteristic Type	Used to indicate the characteristic type.	Yes (Conditional)
	Note: The list includes only those characteristic types where the characteristic entity is set to **Benefit Sub Type**.	**Note:** This field is required when you are defining the characteristics for a benefit sub type.
Characteristic Value	Used to specify the value for the characteristic type.	Yes (Conditional)
		Note: This field is required when you are defining the characteristics for a benefit sub type.

2. Enter the required characteristic in the **Characteristics** section.
3. If you want to define more than one characteristic for the benefit sub type, click the **Add** (+) icon and then repeat step 2.

   Note: However, if you want to remove a characteristic from the benefit sub type, click the **Delete** ( ) icon corresponding to the characteristic

4. Click **Save**.
   The characteristic is defined for the benefit sub type.

Related Topics

For more information on...	See...
How to define a benefit sub type	Defining a Benefit Sub Type on page 101
How to edit a benefit sub type	Editing a Benefit Sub Type on page 105
How to copy a benefit sub type	Copying a Benefit Sub Type on page 109

Editing a Benefit Sub Type

Prerequisites

To edit a benefit sub type, you should have:

- Value defined for the **Proration SQI** option type in the **C1-ASOBLLNG** feature configuration.

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- Required price items and SQIs defined in the application.
- Sponsor account defined in the application.

Procedure

To edit a benefit sub type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **B** and then click **Benefit Sub Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Benefit Sub Type** sub-menu.
   The **Benefit Sub Type** screen appears.
4. In the **Search Results** section, click the **Edit** (✎) icon in the **Edit** column corresponding to the benefit sub *t*ype whose details you want to edit.

> **Note:** The Edit icon appears only when a benefit is not defined using the benefit sub type.

The **Benefit Sub Type** screen appears. It contains the following sections:

- **Main** - Used to specify the basic details about the benefit sub type. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Benefit Sub Type	Displays the benefit sub type.	Not applicable
Description	Used to specify the description for the benefit sub type.	Yes
Status	Used to indicate the status of the benefit sub type. • **Active** • **Inactive**	Yes
Value Type	Used to indicate whether the benefit amount should be a flat or calculated amount. The valid values are: • **Flat** - Used when you want to specify the pass-through amount while creating a membership benefit for Medicare Part D LIS, Medicare Part D LEP, APTC, etc. • **Not Applicable** - Used when you to want the system to calculate the benefit amount for the availed Medicare Part A, Part B, or Part D membership benefit.	Yes
Externally Priced	Used to indicate whether the benefit amount is calculated in the enrollment system. **Note:** This field appears when **Flat** option is selected from the **Value Type** list.	No
Validate External Price	Used when you want to validate whether the externally calculated benefit amount is within the threshold range. **Note:** This field appears when the **Externally Priced** option is selected.	No
Validate Price Item	Used to indicate the price item using which you want to create the membership benefit charge for validation.	Yes (Conditional)

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The **Search** (🔍) icon appears corresponding to the **Validate Price Item** field. On clicking the **Search** icon, the **Search** window appears. This field appears when the **Validate External Price** option is selected.	**Note:** This field is required when the **Validate External Price** option is selected.
Charge Negatively	Used to indicate whether you want to create a negative charge for the benefit amount. **Note:** This field appears when the **Flat** option is selected from the **Value Type** list and the **Externally Priced** option is not selected.	No
Benefit SQI	Used to specify the SQI using which you want to create an SQI based billable charge for the membership benefit. If you do not specify the value, the system will derive the SQI from the **Proration SQI** option type of the **C1-ASOBLLNG** feature configuration. **Note:** This field appears when the **Flat** option is selected from the **Value Type** list and the **Externally Priced** check box is not selected.	No
Charge Benefit Sponsor	Used to indicate whether you want to create a reverse charge for the benefit sponsor. The reverse charge can then be used by the health insurance payer for reconciliation. **Note:** This field appears when **Flat** option is selected from the **Value Type** list and the **Externally Priced** option is not selected.	No
Benefit Sponsor Account	Used to indicate the account of sponsor on which you want to create the reverse charge. **Note:** The **Search** (🔍) icon appears corresponding to the **Benefit Sponsor Account** field. On clicking the **Search** icon, the **Search** window appears. On specifying the benefit sponsor amount, the description of the benefit sponsor amount appears corresponding to the **Benefit Sponsor Account** field. This field appears when the **Charge Benefit Sponsor** option is selected.	Yes (Conditional) **Note:** This field is required when the **Charge Benefit Sponsor** option is selected and the value is not specified in the **Sponsor Account Derivation Algorithm** field.
Sponsor Account Derivation Algorithm	Used to attach an algorithm using which the system can derive the sponsor account for the individual membership. The **C1-SPONSAC** algorithm is shipped with the product.	Yes (Conditional)

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Field Name	Field Description	Mandatory (Yes or No)
	For more information about the algorithm, refer to Membership Benefit Sub Type on page 95. **Note:** The **Search** (🔍) icon appears corresponding to the **Sponsor Account Derivation Algorithm** field. On clicking the **Search** icon, the **Search** window appears. On specifying the sponsor account derivation algorithm, the description of the sponsor account derivation algorithm appears corresponding to the **Sponsor Account Derivation Algorithm** field. This field appears when the **Charge Benefit Sponsor** option is selected.	**Note:** This field is required when the **Charge Benefit Sponsor** option is selected.
Benefit Sponsor Price Item	Used to indicate the price item using which you want to create the reverse charge. **Note:** The **Search** (🔍) icon appears corresponding to the **Benefit Sponsor Price Item** field. On clicking the **Search** icon, the **Search** window appears. This field appears when the **Charge Benefit Sponsor** option is selected.	Yes (Conditional) **Note:** This field is required when the **Charge Benefit Sponsor** option is selected.
Benefit Sponsor SQI	Used to specify the SQI using which you want to create a reverse SQI based billable charge for the benefit sponsor. If you do not specify the value, the system will derive the SQI from the **Proration SQI** option type of the **C1-ASOBLLNG** feature configuration. **Note:** This field appears when the **Charge Benefit Sponsor** option is selected.	No

Note: If the **Charge Benefit Sponsor** option is selected, you need to specify the value in either the **Benefit Sponsor Account** or **Sponsor Account Derivation Algorithm** field.

Tip: Alternatively, you can edit the details of a benefit sub type by clicking the **Edit** button in the **Benefit Sub Type** zone.

5. Modify the required details in the **Main** section, if required.
6. Define, edit, or remove characteristics of the benefit sub type, if required
7. Click **Save**.
   The changes made to the benefit sub type are saved.

Related Topics

For more information on...	See...
Benefit Sub Type screen	Benefit Sub Type on page 98

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For more information on...	See...
Benefit Sub Type List zone	Benefit Sub Type List on page 98
Benefit Sub Type zone	Benefit Sub Type on page 99
How to define a characteristic for a benefit sub type	Defining a Characteristic for a Benefit Sub Type on page 105

Copying a Benefit Sub Type

Instead of creating a benefit sub type from scratch, you can create a new benefit sub type using an existing benefit sub type. This is possible through copying a benefit sub type. On copying a benefit sub type, the details are copied to the new benefit sub type. You can then edit the details, if required.

Prerequisites

To define a benefit sub type, you should have:

- Value defined for the **Proration SQI** option type in the **C1-ASOBLLNG** feature configuration.
- Required price items and SQIs defined in the application.
- Sponsor account defined in the application.

Procedure

To copy a benefit sub type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **B** and then click **Benefit Sub Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Benefit Sub Type** sub-menu.
   The **Benefit Sub Type** screen appears.
4. In the **Search Results** section, click the **Duplicate** (⎘) icon in the **Duplicate** column corresponding to the benefit sub *t*ype whose details you want to edit.

   The **Benefit Sub Type** screen appears. It contains the following sections:

   - **Main** - Used to specify the basic details about the benefit sub type. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Benefit Sub Type	Used to specify the benefit sub type.	Yes
Description	Used to specify the description for the benefit sub type.	Yes
Status	Used to indicate the status of the benefit sub type. • **Active** • **Inactive**	Yes
Value Type	Used to indicate whether the benefit amount should be a flat or calculated amount. The valid values are: • **Flat** - Used when you want to specify the pass-through amount while creating a membership benefit for Medicare Part D LIS, Medicare Part D LEP, APTC, etc. • **Not Applicable** - Used when you to want the system to calculate the benefit amount for the availed Medicare Part A, Part B, or Part D membership benefit.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
Externally Priced	Used to indicate whether the benefit amount is calculated in the enrollment system. **Note:** This field appears when **Flat** option is selected from the **Value Type** list.	No
Validate External Price	Used when you want to validate whether the externally calculated benefit amount is within the threshold range. **Note:** This field appears when the **Externally Priced** option is selected.	No
Validate Price Item	Used to indicate the price item using which you want to create the membership benefit charge for validation. **Note:** The **Search** (🔍) icon appears corresponding to the **Validate Price Item** field. On clicking the **Search** icon, the **Search** window appears. This field appears when the **Validate External Price** option is selected.	Yes (Conditional) **Note:** This field is required when the **Validate External Price** option is selected.
Charge Negatively	Used to indicate whether you want to create a negative charge for the benefit amount. **Note:** This field appears when the **Flat** option is selected from the **Value Type** list and the **Externally Priced** option is not selected.	No
Benefit SQI	Used to specify the SQI using which you want to create an SQI based billable charge for the membership benefit. If you do not specify the value, the system will derive the SQI from the **Proration SQI** option type of the **C1-ASOBLLNG** feature configuration. **Note:** This field appears when the **Flat** option is selected from the **Value Type** list and the **Externally Priced** check box is not selected.	No
Charge Benefit Sponsor	Used to indicate whether you want to create a reverse charge for the benefit sponsor. The reverse charge can then be used by the health insurance payer for reconciliation. **Note:** This field appears when **Flat** option is selected from the **Value Type** list and the **Externally Priced** option is not selected.	No
Benefit Sponsor Account	Used to indicate the account of sponsor on which you want to create the reverse charge.	Yes (Conditional)

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The **Search** (🔍) icon appears corresponding to the **Benefit Sponsor Account** field. On clicking the **Search** icon, the **Search** window appears. On specifying the benefit sponsor amount, the description of the benefit sponsor amount appears corresponding to the **Benefit Sponsor Account** field. This field appears when the **Charge Benefit Sponsor** option is selected.	**Note:** This field is required when the **Charge Benefit Sponsor** option is selected and the value is not specified in the **Sponsor Account Derivation Algorithm** field.
Sponsor Account Derivation Algorithm	Used to attach an algorithm using which the system can derive the sponsor account for the individual membership. The **C1-SPONSAC** algorithm is shipped with the product. For more information about the algorithm, refer to Membership Benefit Sub Type on page 95.	Yes (Conditional) **Note:** This field is required when the **Charge Benefit Sponsor** option is selected.
	Note: The **Search** (🔍) icon appears corresponding to the **Sponsor Account Derivation Algorithm** field. On clicking the **Search** icon, the **Search** window appears. On specifying the sponsor account derivation algorithm, the description of the sponsor account derivation algorithm appears corresponding to the **Sponsor Account Derivation Algorithm** field. This field appears when the **Charge Benefit Sponsor** option is selected.	
Benefit Sponsor Price Item	Used to indicate the price item using which you want to create the reverse charge.	Yes (Conditional) **Note:** This field is required when the **Charge Benefit Sponsor** option is selected.
	Note: The **Search** (🔍) icon appears corresponding to the **Benefit Sponsor Price Item** field. On clicking the **Search** icon, the **Search** window appears. This field appears when the **Charge Benefit Sponsor** option is selected.	
Benefit Sponsor SQI	Used to specify the SQI using which you want to create a reverse SQI based billable charge for the benefit sponsor. If you do not specify the value, the system will derive the SQI from the **Proration SQI** option type of the **C1-ASOBLLNG** feature configuration. **Note:** This field appears when the **Charge Benefit Sponsor** option is selected.	No

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> **Note:** If the **Charge Benefit Sponsor** option is selected, you need to specify the value in either the **Benefit Sponsor Account** or **Sponsor Account Derivation Algorithm** field.

> **Tip:** Alternatively, you can copy a benefit sub type by clicking the **Duplicate** button in the **Benefit Sub Type** zone.

5. Define, edit or remove the required details in the **Main** section, if required.
6. Click **Save**.
   The new benefit sub type is saved.

Related Topics

For more information on...	See...
Benefit Sub Type screen	Benefit Sub Type on page 98
Benefit Sub Type List zone	Benefit Sub Type List on page 98
Benefit Sub Type zone	Benefit Sub Type on page 99
How to define a characteristic for a benefit sub type	Defining a Characteristic for a Benefit Sub Type on page 105

Deleting a Benefit Sub Type

Procedure

To delete a benefit sub type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **B** and then click **Benefit Sub Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Benefit Sub Type** sub-menu.
   The **Benefit Sub Type** screen appears.
4. In the **Benefit Sub Type List** zone, click the **Delete** (🗑) icon in the **Delete** column corresponding to *t*he benefit sub type that you want to delete.

   A message appears confirming whether you want to delete the benefit sub type.
5. Click **OK**.
   The benefit sub type is deleted.

> **Note:** You can delete a benefit sub type only when a benefit is not defined using the benefit sub type.

> **Tip:** Alternatively, you can delete a benefit sub type by clicking the **Delete** button in the **Benefit Sub Type** zone.

Related Topics

For more information on...	See...
Benefit Sub Type screen	Benefit Sub Type on page 98
Benefit Sub Type List zone	Benefit Sub Type List on page 98
Benefit Sub Type zone	Benefit Sub Type on page 99

Viewing the Details of a Benefit Sub Type

Procedure

To view the details of a benefit sub type :

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1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **B** and then click **Benefit Sub Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Benefit Sub Type** sub-menu.
   The **Benefit Sub Type** screen appears.
4. In the **Benefit Sub Type List** zone, click the **Broadcast** (📡) icon corresponding to the benefit sub type *w*hose details you want to view:
   The **Benefit Sub Type** zone appears.
5. View the details of a benefit sub type in the **Benefit Sub Type** zone.

Related Topics

For more information on...	See...
Benefit Sub Type screen	Benefit Sub Type on page 98
Benefit Sub Type List zone	Benefit Sub Type List on page 98
Benefit Sub Type zone	Benefit Sub Type on page 99

Benefit (Used for Searching)

The **Benefit** screen allows you to search for a membership benefit using various search criteria. It also allows you to create a membership benefit, such as Medicare Part A, Medicare Part B, Medicare Part D, Medicare Part D LIS, Medicare Part D LEP, APTC, etc. It contains the following zone:

- Search Benefit on page 113

Search Benefit

The **Search Benefit** zone allows you to search for a membership benefit using various search criteria. It contains the following two sections:

- **Search Criteria** - The **Search Criteria** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Search By	Used to indicate whether you want to search for a membership benefit using the benefit, policy, or person details. The valid values are: • Benefit Details • Policy Details • Person Details **Note:** By default, the **Benefit Details** option is selected.	Yes
Benefit ID	Used to search a particular membership benefit. **Note:** This field appears when the **Benefit Details** option is selected from the **Search By** list.	No
Membership ID	Used to search membership benefits of a particular membership.	No

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Field Name	Field Description	Mandatory (Yes or No)
	Note: This field appears when the **Benefit Details** option is selected from the **Search By** list. The **Search** (🔍) icon appears corresponding to the **Membership ID** field. On clicking the **Search** icon, the **Membership Search** window appears.	
Start Date	Used to specify the date from when the benefit is availed for the membership.	No
	Note: This field appears when the **Benefit Details** option is selected from the **Search By** list. The start date of the membership benefit cannot be earlier than the membership start date or later than the membership end date. The membership benefit start date cannot be later than the membership benefit end date.	
End Date	Used to specify the date till when the benefit is availed for the membership.	No
	Note: This field appears when the **Benefit Details** option is selected from the **Search By** list. The end date of the membership benefit cannot be earlier than the membership start date or later than the membership end date. The membership benefit end date cannot be earlier than the membership benefit start date.	
Status	Used to search membership benefits with a particular status. The valid values are: • Active • Discarded • Inactive	No
	Note: This field appears when the **Benefit Details** option is selected from the **Search By** list.	
Benefit Type	Used to indicate the type of benefit availed for the membership. The valid values are: • Commercial • Medicare Affiliated	No

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Field Name	Field Description	Mandatory (Yes or No)
	Note: This field appears when the **Benefit Details** option is selected from the **Search By** list. The list includes the values which are defined in the **BENEFIT_TYPE_FLG** lookup field. At present, the **Commercial** benefit type is not supported. The implementation team can build the custom logic based on the business requirements.	
Benefit Sub Type	Used to indicate whether the membership benefit is a Medicare Part A, Part B, or Part D benefit, Medicare Part D LIS, Medicare Part D LEP, APTC benefit, or any other membership benefit. **Note:** This field appears when the **Benefit Details** option is selected from the **Search By** list. The list includes those benefit types which are defined through the **Benefit Sub Type** screen.	No
Benefit Source	Used to indicate the source (i.e. health insurance exchange) from where the benefit is received for the membership. The valid values are: • Centers for Medicare and Medicaid Services • State **Note:** This field appears when the **Benefit Details** option is selected from the **Search By** list. The list includes the values which are defined in the **BENEFIT_TYPE_FLG** lookup field.	No
Policy ID	Used to search membership benefits which are availed for the memberships that belong to a particular fully-insured group policy. **Note:** This field appears when the **Policy Details** option is selected from the **Search By** list. The **Search** (🔍) icon appears corresponding to the **Policy ID** field. On clicking the **Search** icon, the **Policy Search** window appears.	No
Policy Plan ID	Used to search membership benefits which are availed for the memberships that belong to a particular policy plan.	No

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Field Name	Field Description	Mandatory (Yes or No)
	Note: This field appears when the **Policy Details** option is selected from the **Search By** list. The **Search** (🔍) icon appears corresponding to the **Policy Plan ID** field. On clicking the **Search** icon, the **Policy Plan Search** window appears.	
External Medicare Beneficiary ID	Used to search membership benefits using an external Medicare beneficiary ID. **Note:** This field appears when the **Person Details** option is selected from the **Search By** list.	No
Person Name	Used to search membership benefits which are availed by a particular person. **Note:** This field appears when the **Person Details** option is selected from the **Search By** list.	No
Person Identifier Type	Used to indicate the person identifier type. **Note:** This field appears when the **Person Details** option is selected from the **Search By** list.	Yes (Conditional) **Note:** If you specify the person identifier as a search criteria, you have to select the person identifier type.
Person Identifier	Used to search membership benefits which are availed by a particular person. **Note:** This field appears when the **Person Details** option is selected from the **Search By** list.	Yes (Conditional) **Note:** If you specify the person identifier type as a search criteria, you have to enter the person identifier.
Relationship Type	Used to search membership benefits which are availed by persons with a particular relationship type. **Note:** This field appears when the **Person Details** option is selected from the **Search By** list.	No

Note: You must specify at least one search criterion while searching for a membership benefit.

- **Search Results** - On clicking the **Search** button, the search results appear based on the specified search criteria. The **Search Results** section contains the following columns:

Column Name	Column Description
Benefit Information	Displays information about the membership benefit.

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Column Name	Column Description
	Note: It has a link. On clicking the link, the **Benefit** screen appears where you can view the details of the respective benefit.
Membership Information	Indicates the membership for which the benefit is availed.
	Note: It has a link. On clicking the link, the **Membership** screen appears where you can view the details of the respective membership.
Member Person Information	Indicates the main subscriber of the membership. In addition, a context menu appears corresponding to this column which helps in navigating to other screens in application.
	Note: It has a link. On clicking the link, the **Person** screen appears where you can view the details of the respective member person.
Status	Indicates the status of the membership benefit. The valid values are: • Active • Discarded • Inactive
Benefit Source	Indicates the source (i.e. health insurance exchange) from where the benefit is received for the membership. The valid values are: • Centers for Medicare and Medicaid Services • State
Benefit Type	Indicates the type of benefit availed for the membership. The valid values are: • Commercial • Medicare Affiliated
Benefit Sub Type	Indicates indicate whether the membership benefit is a Medicare Part A, Part B, or Part D benefit, Medicare Part D LIS, Medicare Part D LEP, APTC benefit, or any other membership benefit.
Benefit Amount	Displays the pass-through amount for the availed membership benefit.

Note: Pagination is used to display limited number of records in the **Search Results** section. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

Related Topics

For more information on...	See...
How to search for a membership benefit	Searching for a Membership Benefit on page 117
How to view the details of a membership benefit	Viewing the Membership Benefit Details on page 122
How to define a membership benefit	Defining a Membership Benefit on page 118

Searching for a Membership Benefit

Prerequisites

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To search for a membership benefit, you should have:

- Required benefit sub types defined in the application

Procedure

To search for a membership benefit:

1. Click the **Menu** link in the **Application** toolbar.
   A list appears.
2. From the **Main** menu, select **Customer Management** and then click **Benefit**.
   The **Benefit** screen appears.
3. Enter the search criteria in the **Search Benefit** zone.

> **Note:** ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.

4. Click **Search**.
   A list of membership benefits that meet the search criteria appears in the **Search Results** section.

Related Topics

For more information on...	See...
Benefit screen	Benefit (Used for Searching) on page 113
Search Benefit zone	Search Benefit on page 113

Defining a Membership Benefit

Prerequisites

To define a membership benefit, you should have:

- Required benefit sub types defined in the application
- Required Medicare plan benefit package defined in the application

Procedure

To define a membership benefit:

1. Click the **Menu** link in the **Application** toolbar.
   A list appears.
2. From the **Main** menu, select **Customer Management** and then click **Benefit**.
   A sub-menu appears.
3. Click the **Add** option from the **Benefit** sub-menu.

   The **Benefit** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details of the membership benefit.
   - **Characteristics** - Used to define the characteristics for the membership benefit.

   The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Membership Information	Used to indicate the membership for which the benefit is availed.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The **Search** icon appears corresponding to the **Membership ID** field. On clicking the **Search** icon, the **Membership Search** window appears. On specifying the membership information, the membership details appears corresponding to the **Membership Information** field.	
Benefit Source	Used to indicate the source (i.e. health insurance exchange) from where the benefit is received for the membership. The valid values are: • Centers for Medicare and Medicaid Services • State **Note:** The list includes the values which are defined in the **BENEFIT_SRC_FLG** lookup field.	Yes
Benefit Type	Used to indicate the type of benefit availed for the membership. The valid value is: • Commercial • Medicare Affiliated **Note:** The list includes the values which are defined in the **BENEFIT_TYPE_FLG** lookup field.	Yes
Benefit Sub Type	Used to indicate whether the membership benefit is a Medicare Part A, Part B, or Part D benefit, Medicare Part D LIS, Medicare Part D LEP, APTC benefit, or any other membership benefit. **Note:** The list includes only those benefit types which are defined through the **Benefit Sub Type** screen.	Yes
Medicare Plan Benefit Package	Used to indicate the Medicare plan benefit package (i.e. 800 series plan) which is applicable for the membership benefit. **Note:** The list includes those Medicare plan benefit packages which are defined using the **Medicare Plan Benefit** preference category through the **Field Mapping** screen. This field appears only when the value type in the benefit sub type is set to **Not Applicable**.	Yes (Conditional) **Note:** This field is required while creating the Medicare Part A, Part B, or Part D membership benefit.
Start Date	Used to specify the date from when the benefit is availed for the membership.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The start date of the membership benefit cannot be earlier than the membership start date or later than the membership end date. The membership benefit start date cannot be later than the membership benefit end date.	
End Date	Used to specify the date till when the benefit is availed for the membership. **Note:** The end date of the membership benefit cannot be earlier than the membership start date or later than the membership end date. The membership benefit end date cannot be earlier than the membership benefit start date.	No
Benefit Amount	Used to specify the pass-through amount for the availed membership benefit. **Note:** This field appears only when the value type in the benefit sub type is set to **Flat**.	Yes (Conditional) **Note:** This field is required while creating the Medicare Part D LIS, Medicare Part D LEP, APTC, or other membership benefits.

Tip: Alternatively, you can access this screen by clicking the **Add** button in the **Page Title** area of the **Benefit** screen.

4. Enter the required details in the **Main** section.
5. Define characteristics for the membership benefit, if required.
6. Click **Save**.
   The membership benefit is defined for the member person in the **Active** status.

Note: You cannot define more than one membership benefit for the same membership, member person, benefit source, benefit type, and benefit sub type combination.

Related Topics

For more information on...	See...
Benefit screen	Benefit (Used for Searching) on page 113
How to define a characteristic for a membership benefit	Defining a Characteristic for a Membership Benefit on page 121
How to define a Medicare plan benefit package	Defining a Medicare Plan Benefit Package on page 137

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Defining a Characteristic for a Membership Benefit

Prerequisites

To define a characteristic for a membership benefit, you should have:

- Characteristic types defined in the application (where the characteristic entity is set to **Benefits**)

Procedure

To define a characteristic for a membership benefit:

1. Ensure that the **Characteristics** section is expanded when you are defining or editing a membership benefit.

   The **Characteristics** section contains the following fields in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Effective Date	Used to specify the date from when the characteristic is effective for the membership benefit.	Yes (Conditional) **Note:** This field is required while defining a characteristic for a membership benefit.
Characteristic Type	Used to indicate the characteristic type. **Note:** The list includes only those characteristic types where the characteristic entity is set to **Benefits**.	Yes (Conditional) **Note:** This field is required while defining a characteristic for a membership benefit.
Characteristic Value	Used to specify the value for the characteristic type. **Note:** If you select a predefined characteristic type, the **Search** (🔍) icon appears corresponding to the **Characteristic Value** field. On clicking the **Search** icon, you can search for a predefined characteristic value. On specifying the value for a predefined characteristic type, the description of the characteristic value appears corresponding to the **Characteristic Value** field.	Yes (Conditional) **Note:** This field is required while defining a characteristic for a membership benefit.

2. Enter the required details in the **Characteristics** section.
3. If you want to define more than one characteristic for the membership benefit, click the **Add** (+) icon and then *r*epeat step *2*.

   Note: However, if you want to remove a characteristic of the membership benefit, click the **Delete** (🗑) icon corresponding to the characteristic.

4. Click **Save**.
   The characteristics are defined for the membership benefit.

Related Topics

For more information on...	See...
How to define a membership benefit	Defining a Membership Benefit on page 118

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For more information on...	See...
How to edit a membership benefit	Editing a Membership Benefit on page 125

Viewing the Membership Benefit Details

Procedure

To view the details of a membership benefit:

1. Search for the membership benefit in the **Benefit** screen.
2. In the **Search Results** section, click the link in the **Benefit Information** column corresponding to the membership benefit whose details you want to view.
   The **Benefit** screen appears.
3. Ensure that the **Main** tab is selected.
4. View the details of the membership benefit in the **Benefit** zone.
5. View the characteristics of the membership benefit in the **Benefit Characteristics** zone.

Related Topics

For more information on...	See...
How to search for a membership benefit	Searching for a Membership Benefit on page 117
Benefit screen	Benefit (Used for Viewing) on page 122
Benefit zone	Benefit on page 122
Benefit Characteristics zone	Benefit Characteristics on page 124

Benefit (Used for Viewing)

Once you create a membership benefit, the **Benefit** screen allows you to:

- View the details of the membership benefit
- Edit the details of the membership benefit
- Discard the membership benefit
- View the log of the membership benefit
- Add a log entry for the membership benefit

It consists of the following tabs:

- Benefit - Main on page 122
- Benefit - Log on page 124

Benefit - Main

The **Main** tab displays information about the membership benefit. It contains the following zones:

- Benefit on page 122
- Benefit Characteristics on page 124

Benefit

The **Benefit** zone displays the details of the membership benefit. It contains the following sections:

- **Main** - Displays basic information about the membership benefit. It contains the following fields:

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Field Name	Field Description
Benefit Information	Displays information about the membership benefit.
Membership Information	Indicates the membership for which the benefit is availed. **Note:** It has a link. On clicking the link, the **Membership** screen appears where you can view the details of the respective membership.
Benefit Source	Indicates the source (i.e. health insurance exchange) from where the benefit is received for the membership. The valid values are: • Centers for Medicare and Medicaid Services • State
Benefit Type	Indicates the type of benefit availed for the membership. The valid values are: • Commercial • Medicare Affiliated
Benefit Sub Type	Indicates whether the membership benefit is a Medicare Part A, Part B, or Part D benefit, Medicare Part D LIS, Medicare Part D LEP, APTC benefit, or any other membership benefit.
Medicare Plan Benefit Package	Indicates the Medicare plan benefit package (i.e. 800 series plan) which is applicable for the membership benefit. **Note:** This field appears only when the value type in the benefit sub type is set to **Not Applicable**.
Start Date	Displays the date from when the benefit is availed for the membership.
End Date	Displays the date till when the benefit is availed for the membership.
Status	Indicates the status of the membership benefit. The valid values are: • Active • Discarded • Inactive
Benefit Amount	Displays the pass-through amount for the availed membership benefit. **Note:** This field appears only when the value type in the benefit sub type is set to **Flat**.

- **Record Actions** - This section contains the following buttons:

Button Name	Button Description
Edit	Used to edit the details of the membership benefit. **Note:** The **Edit** button appears when the membership benefit are in the **Active** status.
Discard	Used to discard a membership benefit. **Note:** The **Discard** button appears when the benefit is in the **Active** or **Inactive** status.

- **Record Information** - This section contains the following fields:

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Field Name	Field Description
Business Object	Indicates the business object using which the membership benefit is created. In addition, a context menu appears corresponding to this field which helps in navigating to other screens in the application. **Note:** It has a link. On clicking the link, the **Business Object** screen appears where you can view the details of the respective business object.
Status Date/Time	Displays the date and time when the membership benefit status is updated.
Create Date/Time	Displays the date and time when the membership benefit is created.

Related Topics

For more information on...	See...
How to edit a membership benefit	Editing a Membership Benefit on page 125
How to discard a membership benefit	Discarding a Membership Benefit on page 127

Benefit Characteristics

The **Benefit Characteristics** zone lists the characteristics of the membership benefit. It contains the following columns:

Column Name	Column Description
Effective Date	Displays the date from when the characteristic is effective for the membership benefit.
Characteristic Type	Indicates the characteristic type.
Characteristic Value	Displays the value of the characteristic type.
Description	Displays the description of the characteristic value. **Note:** The data appears in this column when the type of characteristic value is set to **Predefined Value**.

You can filter the list using the **Effective Date** field available in the **Filter** area. By default, the **Filter** area is hidden. You can view the **Filter** area by clicking the **Filters** (▽) icon in the upper right corner of this zone.

Benefit - Log

The **Log** tab contains the following zone:

- Benefit Log on page 124

Benefit Log

The **Benefit Log** zone lists the complete trail of actions performed on the membership benefit. It contains the following columns:

Column Name	Column Description
Creation Date Time	Displays the date and time when the action was performed on the membership benefit.
Details	Displays the details about the action performed on the membership benefit.

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Column Name	Column Description
User	Indicates the user who has performed the action on the membership benefit.
Log Type	Indicates the type of log.
Related Object	Indicates the object or entity which is created when the action is performed on the membership benefit.
	Note: At present, no data appears in this column. The implementation team can build the custom logic to meet the business requirements.
Status Reason	Indicates the reason why the status of the membership benefit is changed.
	Note: At present, no data appears in this column. The implementation team can build the custom logic to meet the business requirements.

Note: You can manually add a log entry for the membership benefit by clicking the **Add Log Entry** link in the upper right corner of the **Benefit Log** zone.

Related Topics

For more information on...	See...
How to view the log of a membership benefit	Viewing the Log of a Membership Benefit on page 127
How to add a log entry for a membership benefit	Adding a Log Entry for a Membership Benefit on page 127

Editing a Membership Benefit

You can only edit the characteristics of a membership benefit from the user interface. On editing a membership benefit, the system inactivates the old record and creates a new record in the system. The status of the old benefit record is set to **Inactive** and the status of the new benefit record is set to **Active**.

Procedure

To edit a membership benefit:

1. Search for the membership benefit in the **Benefit** screen.
2. In the **Search Results** section, click the link in the **Benefit Information** column corresponding to the membership benefit *w*hose details you want to edit.
   The **Benefit** screen appears.
3. Ensure that the **Main** tab is selected.
4. Click the **Edit** button in the **Benefit** zone.

   The **Benefit** screen appears. It contains the following sections:

   - **Main** - Displays basic details of the membership benefit.
   - **Characteristics** - Used to define the characteristics for the membership benefit.

   The **Main** section contains the following fields:

Field Name	Field Description
Benefit Information	Displays information about the membership benefit.
Membership Information	Indicates the membership for which the benefit is availed.

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Field Name	Field Description
Benefit Source	Indicates the source (i.e. health insurance exchange) from where the benefit is received for the membership. The valid values are: • Centers for Medicare and Medicaid Services • State
Benefit Type	Indicates the type of benefit availed for the membership. The valid values are: • Commercial • Medicare Affiliated
Benefit Sub Type	Indicates whether the membership benefit is a Medicare Part A, Part B, or Part D benefit, Medicare Part D LIS, Medicare Part D LEP, APTC benefit, or any other membership benefit.
Medicare Plan Benefit Package	Indicates the Medicare plan benefit package (i.e. 800 series plan) which is applicable for the membership benefit. **Note:** This field appears only when the value type in the benefit sub type is set to **Not Applicable**.
Start Date	Displays the date from when the benefit is availed for the membership.
End Date	Displays the date till when the benefit is availed for the membership. **Note:** The system enables you to edit the end date of a membership benefit through a health care inbound message or through the membership repricing inbound web service.
Benefit Amount	Displays the pass-through amount for the availed membership benefit. **Note:** This field appears only when the value type in the benefit sub type is set to **Flat**. The system enables you to edit the amount of a membership benefit through a health care inbound message or through the membership repricing inbound web service.

Note: The **Edit** button appears when the membership benefit is in the **Active** status.

5. Define, edit, or remove characteristics of the membership benefit, if required.
6. Click **Save**.
   The changes made to the membership benefit are saved.

Related Topics

For more information on...	See...
How to search for a membership benefit	Searching for a Membership Benefit on page 117
Benefit screen	Benefit (Used for Viewing) on page 122
Benefit zone	Benefit on page 122
How to define a characteristic for a membership benefit	Defining a Characteristic for a Membership Benefit on page 121

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Discarding a Membership Benefit

Procedure

To discard a membership benefit:

1. Search for the membership benefit in the **Benefit** screen.
2. In the **Search Results** section, click the link in the **Benefit Information** column corresponding to the *m*embership benefit that you want to discard.
   The **Benefit** screen appears.
3. Ensure that the **Main** tab is selected.
4. Click the **Discard** button in the **Benefit** zone.
   The status of the membership benefit is changed to **Discarded**.

> **Note:** The **Discard** button appears when the membership benefit is in **Active** or **Inactive** status.

Related Topics

For more information on...	See...
How to search for a membership benefit	Searching for a Membership Benefit on page 117
Benefit screen	Benefit (Used for Viewing) on page 122
Benefit zone	Benefit on page 122

Viewing the Log of a Membership Benefit

Procedure

To view the log of a membership benefit:

1. Search for the membership benefit in the **Benefit** screen.
2. In the **Search Results** section, click the link in the **Benefit Information** column corresponding to the *m*embership benefit whose details you want to view.
   The **Benefit** screen appears.
3. Click the **Log** tab.
   The **Log** tab appears.
4. View the complete trail of actions performed on the membership benefit in the **Benefit Log** zone.

Related Topics

For more information on...	See...
How to search for a membership benefit	Searching for a Membership Benefit on page 117
Benefit screen	Benefit (Used for Viewing) on page 122
Benefit Log zone	Benefit Log on page 124
How to add a log entry for a membership benefit	Adding a Log Entry for a Membership Benefit on page 127

Adding a Log Entry for a Membership Benefit

Procedure

To add a log entry for a membership benefit:

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1. Search for the membership benefit in the **Benefit** screen.
2. In the **Search Results** section, click the link in the **Benefit Information** column corresponding to *t*he membership benefit whose log you want to edit.
   The **Benefit** screen appears.
3. Click the **Log** tab.
   The **Log** tab appears.
4. Click the **Add Log Entry** link in the upper right corner of the **Benefit Log** zone.

   The **Add Benefit Log** window appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Benefit Information	Displays information about the membership benefit.	Not applicable
Log Details	Used to specify additional comments for the membership benefit.	Yes

5. Enter the comments in the **Log Details** field.
6. Click **Save**.
   The log entry is added in the **Benefit Log** zone.

Related Topics

For more information on...	See...
How to search for a membership benefit	Searching for a Membership Benefit on page 117
Benefit screen	Benefit (Used for Viewing) on page 122
Benefit Log zone	Benefit Log on page 124

Medicare Preference

The Medicare preference enables you to set the attributes which are used while creating charges for Medicare Part D Low Income Subsidy (LIS) and Late Enrollment Penalty (LEP). While deriving the LIS and LEP details, the system uses the following attributes from the medicare preference:

- Late Enrollment Penalty
- Low Income Subsidy
- Medicare Prescription Drug Coverage

For more information about these attributes, see Defining a Medicare Preference on page 129.

The system considers the medicare preference which is specified in the **Medicare** option type of the **C1-ASOBLLNG** feature configuration. You can define, edit, delete, and copy a medicare preference through the **Field Mapping** screen.

Related Topics

For more information on...	See...
How to setup the **C1-ASOBLLNG** feature configuration	Setting the C1-ASOBLLNG Feature Configuration on page 4417

Searching for a Medicare Preference

Prerequisites

To search for a medicare preference, you should have:

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- Values defined in the **FIELD_CAT_FLG** lookup field

Procedure

To search for a medicare preference:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **F** and then click **Field Mapping**.
   A sub-menu appears.
3. Click the **Search** option from the **Field Mapping** sub-menu.
   The **Field Mapping** screen appears.
4. Select the **Medicare** option from the **Preference Category** list.
5. Enter the additional search criteria in the **Search Field Mapping** zone.

   Note: ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.
6. Click **Search**.
   A list of medicare preferences that meet the search criteria appears in the **Search Results** section.

Viewing the Medicare Preference Details

Procedure

To view the details of a medicare preference:

1. Search for the medicare preference in the **Field Mapping** screen.
2. In the **Search Results** section, click the **Broadcast** (ᯤ) icon corresponding to the medicare preference whose details you want to view.
   The **Field Mapping** zone appears.
3. View the details of the medicare preference in the **Field Mapping** zone.

Related Topics

For more information on...	See...
How to search for a medicare preference	Searching for a Medicare Preference on page 128

Defining a Medicare Preference

Prerequisites

To define a medicare preference, you should have:

- Values defined in the **MAP_ENTITY_FLG** lookup field
- Value defined for the **Medicare** option type in the **C1-ASOBLLNG** feature configuration.

Procedure

To define a medicare preference:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **F** and then click **Field Mapping**.
   A sub-menu appears.

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3. Click the **Add** option from the **Field Mapping** sub-menu.

   The **Select Business Object** screen appears. It contains the following field:

Field Name	Field Description	Mandatory (Yes or No)
Field Mapping Business Object	Used to indicate the business object using which you want to create the billing preference. The valid values are: • Field Mapping • Medicare Plan Benefit Package • Membership Status Reason Mapping	Yes

Note: Alternatively, you can access the **Select Business Object** screen by clicking the **Add** button in the **Page Title** area of the **Field Mapping** screen.

4. Select the **Field Mapping** option from the **Field Mapping Business Object** list.
5. Click **OK**.

   The **Field Mapping** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details of the billing preference. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Preference	Used to specify the billing preference.	Yes
Description	Used to specify the description for the billing preference.	Yes
Detailed Description	Used to specify additional information about the billing preference.	No
Status	Used to indicate the status of the billing preference. The valid values are: • Active • Inactive	Yes

   - **Preference Category** - This section contains the following field:

Field Name	Field Description	Mandatory (Yes or No)
Preference Category	Used to indicate the category to which the preference belongs. The valid values are: • Billing • Binder Payment • Geographic Rating Area • Individual Membership • Medicare • Medicare Plan Benefit • Member Reconciliation • Member Relationship and Subscription Tier • Membership Status Reason • Statement Construct	Yes

   - **Preference Settings** - Used to set the attributes in the billing preference. It contains the following fields in a grid:

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<table>
<tr><th>Field Name</th><th>Field Description</th><th>Mandatory (Yes or No)</th></tr>
<tr><td>Attribute</td><td>Used to indicate the attribute which you want to set in the medicare preference. The valid values are:
Late Enrollment Penalty - Used when you want to indicate the benefit sub type for Medicare Part D LEP in the medicare preference.
Low Income Subsidy - Used when you want to indicate the benefit sub type for Medicare Part D LIS in the medicare preference.
Medicare Prescription Drug Coverage - Used when you want to indicate the benefit sub type for Medicare Part D in the medicare preference.</td><td>Yes (Conditional)
Note: This field is required while setting an attribute in the medicare preference.</td></tr>
<tr><td>Value</td><td>Used to specify the attribute value. The attribute value that you can specify varies depending on the attribute you want to set in the billing preference:<table><tr><th>If the attribute is set to...</th><th>Then, this field is...</th></tr><tr><td>Late Enrollment Penalty</td><td>Used to specify the benefit sub type that you want to use while creating charges for Medicare Part D LEP.</td></tr><tr><td>Low Income Subsidy</td><td>Used to specify the benefit sub type that you want to use while creating charges for Medicare Part D LIS.</td></tr><tr><td>Medicare Prescription Drug Coverage</td><td>Used to specify the benefit sub type that you want to use while creating charges for Medicare Part D.</td></tr></table></td><td>Yes (Conditional)
Note: This field is required while setting an attribute in the medicare preference.</td></tr>
<tr><td>Entity Type</td><td>Used to indicate the type of entity for which the attribute is applicable. The valid values are:
Account
Billable Charge
Note: At present, this data is stored for informational purposes only and is not considered in the business logic. If required, you can add more entity types to the MAP_ENTITY_FLG lookup field.</td><td>No</td></tr>
</table>

Note: While defining a medicare preference, you must set at least one attribute in the billing preference.

6. Select the **Medicare** option from the **Preference Category** list.
7. Enter the required details in the **Main** section.
8. Select the required attribute and value from the respective fields.
9. If you want to set more than one attribute in the medicare preference, click the **Add** (+) icon and then repeat step 8.

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> **Note:** However, if you want to remove an attribute from the medicare preference, click the **Delete** (🗑) icon corresponding to the attribute.

10. Click **Save**.
    The medicare preference is defined.

Editing a Medicare Preference

Prerequisites

To edit a medicare preference, you should have:

- Values defined in the **MAP_ENTITY_FLG** lookup field
- Value defined for the **Medicare** option type in the **C1-ASOBLLNG** feature configuration.

Procedure

To edit a medicare preference:

1. Search for the medicare preference in the **Field Mapping** screen.
2. In the **Search Results** section, click the **Edit** (✎) icon in the **Edit** column *c*orresponding to the medicare preference whose details you want to edit.

   The **Field Mapping** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details of the medicare preference. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Preference	Displays the medicare preference.	Not applicable
Description	Used to specify the description for the medicare preference.	Yes
Detailed Description	Used to specify additional information about the medicare preference.	No
Status	Used to indicate the status of the medicare preference. The valid values are: • Active • Inactive	Yes
Preference Category	Indicates the category to which the preference belongs. The valid value is: • Medicare	Not applicable

   - **Preference Settings** - Used to set the attributes in the medicare preference. It contains the following fields in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Attribute	Used to indicate the attribute which you want to set in the medicare preference. The valid values are: • **Late Enrollment Penalty** - Used when you want to indicate the benefit sub type for Medicare Part D LEP in the medicare preference. • **Low Income Subsidy** - Used when you want to indicate the benefit sub type for Medicare Part D LIS in the medicare preference.	Yes (Conditional) **Note:** This field is required while setting an attribute in the medicare preference.

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<table>
<tr><th>Field Name</th><th>Field Description</th><th>Mandatory (Yes or No)</th></tr>
<tr><td></td><td>• Medicare Prescription Drug Coverage - Used when you want to indicate the benefit sub type for Medicare Part D in the medicare preference.</td><td></td></tr>
<tr><td>Value</td><td>Used to specify the attribute value. The attribute value that you can specify varies depending on the attribute you want to set in the billing preference:
<table><tr><th>If the attribute is set to...</th><th>Then, this field is...</th></tr><tr><td>Late Enrollment Penalty</td><td>Used to specify the benefit sub type that you want to use while creating charges for Medicare Part D LEP.</td></tr><tr><td>Low Income Subsidy</td><td>Used to specify the benefit sub type that you want to use while creating charges for Medicare Part D LIS.</td></tr><tr><td>Medicare Prescription Drug Coverage</td><td>Used to specify the benefit sub type that you want to use while creating charges for Medicare Part D.</td></tr></table></td><td>Yes (Conditional)
Note: This field is required while setting an attribute in the medicare preference.</td></tr>
<tr><td>Entity Type</td><td>Used to indicate the type of entity for which the attribute is applicable. The valid values are:
• Account
• Billable Charge
Note: At present, this data is stored for informational purposes only and is not considered in the business logic. If required, you can add more entity types to the MAP_ENTITY_FLG lookup field.</td><td>No</td></tr>
</table>

Tip: Alternatively, you can edit the details of a medicare preference by clicking the **Edit** button in the **Field Mapping** zone.

3. Modify the required details in the **Main** section.
4. Define, edit, or remove the attribute from the medicare preference, if required.

Note: You must set at least one attribute in a medicare preference.

5. Click **Save**.
   The changes made to the medicare preference are saved.

Related Topics

For more information on...	See...
How to search for a medicare preference	Searching for a Medicare Preference on page 128

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Copying a Medicare Preference

Instead of creating a medicare preference from scratch, you can create a new medicare preference using an existing medicare preference. This is possible through copying a medicare preference. On copying a medicare preference, the details including the attributes are copied to the new medicare preference. You can then edit the details, if required.

Prerequisites

To copy a medicare preference, you should have:

- Medicare preference (whose copy you want to create) defined in the application
- Values defined in the **MAP_ENTITY_FLG** lookup field
- Value defined for the **Medicare** option type in the **C1-ASOBLLNG** feature configuration.

Procedure

To copy a medicare preference:

1. Search for the medicare preference in the **Field Mapping** screen.
2. In the **Search Results** section, click the **Duplicate** (⧉) icon in the **Duplicate** column *c*orresponding to the medicare preference whose copy you want to create.

   The **Field Mapping** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details of the medicare preference. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Preference	Used to specify the medicare preference.	Yes
Description	Used to specify the description for the medicare preference.	Yes
Detailed Description	Used to specify additional information about the medicare preference.	No
Status	Used to indicate the status of the medicare preference. The valid values are: • Active • Inactive	Yes
Preference Category	Used to indicate the category to which the preference belongs. The valid values are: • Medicare	Not applicable

   - **Preference Settings** - Used to set the attributes in the medicare preference. It contains the following fields in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Attribute	Used to indicate the attribute which you want to set in the medicare preference. The valid values are: • **Late Enrollment Penalty** - Used when you want to indicate the benefit sub type for Medicare Part D LEP in the medicare preference. • **Low Income Subsidy** - Used when you want to indicate the benefit sub type for Medicare Part D LIS in the medicare preference.	Yes (Conditional) **Note:** This field is required while setting an attribute in the medicare preference.

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<table>
<tr><th>Field Name</th><th>Field Description</th><th>Mandatory (Yes or No)</th></tr>
<tr><td></td><td>• Medicare Prescription Drug Coverage - Used when you want to indicate the benefit sub type for Medicare Part D in the medicare preference.</td><td></td></tr>
<tr><td>Value</td><td>Used to specify the attribute value. The attribute value that you can specify varies depending on the attribute you want to set in the billing preference:
<table><tr><th>If the attribute is set to...</th><th>Then, this field is...</th></tr><tr><td>Late Enrollment Penalty</td><td>Used to specify the benefit sub type that you want to use while creating charges for Medicare Part D LEP.</td></tr><tr><td>Low Income Subsidy</td><td>Used to specify the benefit sub type that you want to use while creating charges for Medicare Part D LIS.</td></tr><tr><td>Medicare Prescription Drug Coverage</td><td>Used to specify the benefit sub type that you want to use while creating charges for Medicare Part D.</td></tr></table></td><td>Yes (Conditional)
Note: This field is required while setting an attribute in the medicare preference.</td></tr>
<tr><td>Entity Type</td><td>Used to indicate the type of entity for which the attribute is applicable. The valid values are:
• Account
• Billable Charge
Note: At present, this data is stored for informational purposes only and is not considered in the business logic. If required, you can add more entity types to the MAP_ENTITY_FLG lookup field.</td><td>No</td></tr>
</table>

Note: While defining a medicare preference, you must set at least one attribute in the medicare preference.

Tip: Alternatively, you can copy a medicare preference by clicking the **Duplicate** button in the **Field Mapping** zone.

3. Enter the required details in the **Main** section.
4. Define, edit, or remove the attribute from the medicare preference, if required.
5. Click **Save**.
   The new medicare preference is defined.

Related Topics

For more information on...	See...
How to search for a medicare preference	Searching for a Medicare Preference on page 128

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Deleting a Medicare Preference

Procedure

To delete a medicare preference:

1. Search for the medicare preference in the **Field Mapping** screen.
2. In the **Search Results** section, click the **Delete** (🗑) icon in the **Delete** column *c*orresponding to the medicare preference that you want to delete.
   A message appears confirming whether you want to delete the medicare preference.

   Tip: Alternatively, you can delete a medicare preference by clicking the **Delete** button in the **Field Mapping** zone.
3. Click **OK**.
   The medicare preference is deleted.

Related Topics

For more information on...	See...
How to search for a medicare preference	Searching for a Medicare Preference on page 128

Medicare Plan Benefit Package

You can define an Employer Group Waiver Plan (EGWP) (i.e. 800 series plan) as a Medicare plan benefit package in the system. While defining a Membership benefit of a member person for Medicare Part A, Part B, and Part D, you need to indicate the Medicare plan benefit package which is applicable for the Membership benefit. You can then use the Medicare plan benefit package as a pricing parameter in the age based or tier based pricing rules using which the Medicare premium is calculated. In this way, the system enables you to offer different pricing for different EGWPs (i.e. 800 series plans).

The system enables you to define, edit, delete, and copy a Medicare plan benefit package through the **Field Mapping** screen.

Searching for a Medicare Plan Benefit Package

Prerequisites

To search for a Medicare plan benefit package, you should have:

- Values defined in the **FIELD_CAT_FLG** lookup field

Procedure

To search for a Medicare plan benefit package:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **F** and then click **Field Mapping**.
   A sub-menu appears.
3. Click the **Search** option from the **Field Mapping** sub-menu.
   The **Field Mapping** screen appears.
4. Select the **Medicare Plan Benefit** option from the **Preference Category** list.
5. Enter the additional search criteria in the **Search Field Mapping** zone.

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> **Note:** ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.

6. Click **Search**.
   A list of Medicare plan benefit packages that meet the search criteria appears in the **Search Results** section.

Viewing the Medicare Plan Benefit Package Details

Procedure

To view the details of a Medicare plan benefit package:

1. Search for the Medicare plan benefit package in the **Field Mapping** screen.
2. In the **Search Results** section, click the **Broadcast** (📡) icon corresponding to the Medicare plan benefit package whose details you want to view.
   The **Field Mapping** zone appears.
3. View the details of the Medicare plan benefit package in the **Field Mapping** zone.

Related Topics

For more information on...	See...
How to search for a Medicare plan benefit package	Searching for a Medicare Plan Benefit Package on page 136

Defining a Medicare Plan Benefit Package

Procedure

To define a Medicare plan benefit package:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **F** and then click **Field Mapping**.
   A sub-menu appears.
3. Click the **Add** option from the **Field Mapping** sub-menu.

   The **Select Business Object** screen appears. It contains the following field:

Field Name	Field Description	Mandatory (Yes or No)
Field Mapping Business Object	Used to indicate the business object using which you want to create the Medicare plan benefit package. The valid values are: • Field Mapping • Medicare Plan Benefit Package • Membership Status Reason Mapping	Yes

> **Note:** Alternatively, you can access the **Select Business Object** screen by clicking the **Add** button in the **Page Title** area of the **Field Mapping** screen.

4. Select the **Medicare Plan Benefit Package** option from the **Field Mapping Business Object** list.
5. Click **OK**.

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The **Medicare Plan Benefit Package** screen appears. It contains the following section:

- **Main** - Used to specify basic details of the Medicare plan benefit package. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Medicare Plan Benefit Package	Used to specify the Medicare plan benefit package (i.e. 800 series plan).	Yes
Description	Used to specify the description for the Medicare plan benefit package.	Yes

6. Enter the required details in the **Main** section.
7. Click **Save**.
   The Medicare plan benefit package is defined.

Editing a Medicare Plan Benefit Package

Procedure

To edit a Medicare plan benefit package:

1. Search for the Medicare plan benefit package in the **Field Mapping** screen.
2. In the **Search Results** section, click the **Edit** (✎) icon in the **Edit** column corresponding to the Medicare plan benefit package whose details you want to edit.

   The **Medicare Plan Benefit Package** screen appears. It contains the following section:

   - **Main** - Used to specify basic details of the Medicare plan benefit package. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Medicare Plan Benefit Package	Displays the Medicare plan benefit package (i.e. 800 series plan).	Not applicable
Description	Used to specify the description for the Medicare plan benefit package.	Yes

Tip: Alternatively, you can edit the details of a Medicare plan benefit package by clicking the **Edit** button in the **Field Mapping** zone.

3. Modify the required details in the **Main** section.
4. Click **Save**.
   The changes made to the Medicare plan benefit package are saved.

Related Topics

For more information on...	See...
How to search for a Medicare plan benefit package	Searching for a Medicare Plan Benefit Package on page 136

Copying a Medicare Plan Benefit Package

Instead of creating a Medicare plan benefit package from scratch, you can create a new Medicare plan benefit package using an existing Medicare plan benefit package. This is possible through copying a Medicare plan benefit package. On copying a Medicare plan benefit package, the details are copied to the new Medicare plan benefit package. You can then edit the details, if required.

Prerequisites

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To copy a Medicare plan benefit package, you should have:

- Medicare plan benefit package (whose copy you want to create) defined in the application

Procedure

To copy a Medicare plan benefit package:

1. Search for the Medicare plan benefit package in the **Field Mapping** screen.
2. In the **Search Results** section, click the **Duplicate** (⧉) icon in the **Duplicate** column *c*orresponding to the Medicare plan benefit package whose copy you want to create.

   The **Medicare Plan Benefit Package** screen appears. It contains the following section:

   - **Main** - Used to specify basic details of the Medicare plan benefit package. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Medicare Plan Benefit Package	Used to specify the Medicare plan benefit package (i.e. 800 series plan).	Yes
Description	Used to specify the description for the Medicare plan benefit package.	Yes

   Tip: Alternatively, you can copy a Medicare plan benefit package by clicking the **Duplicate** button in the **Field Mapping** zone.
3. Enter the required details in the **Main** section.
4. Click **Save**.
   The new Medicare plan benefit package is defined.

Related Topics

For more information on...	See...
How to search for a Medicare plan benefit package	Searching for a Medicare Plan Benefit Package on page 136

Deleting a Medicare Plan Benefit Package

Procedure

To delete a Medicare plan benefit package:

1. Search for the Medicare plan benefit package in the **Field Mapping** screen.
2. In the **Search Results** section, click the **Delete** (🗑) icon in the **Delete** column *c*orresponding to the Medicare plan benefit package that you want to delete.
   A message appears confirming whether you want to delete the Medicare plan benefit package.

   Tip: Alternatively, you can delete a Medicare plan benefit package by clicking the **Delete** button in the **Field Mapping** zone.
3. Click **OK**.
   The Medicare plan benefit package is deleted.

Related Topics

For more information on...	See...
How to search for a Medicare plan benefit package	Searching for a Medicare Plan Benefit Package on page 136

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Geographic Rating Area Preference

Oracle Revenue Management and Billing enables you to use the geographic rating area as a pricing parameter while defining the age based, tier based, and additional fee pricing rules. This feature facilitates you to offer different rates for a price item based on different geographic rating area.

Once you define a geographic rating area, the system can derive the geographic rating area for a membership. While deriving the geographic rating area for a membership, the system uses the following attributes from the geographic rating area preference:

- Address Source Characteristic Type
- Address Type Characteristic Type
- Default Address Source
- Default Address Type
- Default Geographic Rating Area
- Geographic Rating Area Characteristic Type
- Use Plan Details

For more information about these attributes, see Defining a Geographic Rating Area Preference on page 141.

The system considers the geographic rating area preference which is specified in the **Rating Area Field Mapping for Group** option type of the **C1-ASOBLLNG** feature configuration. You can define, edit, delete, and copy a geographic rating area preference through the **Field Mapping** screen.

Related Topics

For more information on...	See...
How to setup the **C1-ASOBLLNG** feature configuration	Setting the C1-ASOBLLNG Feature Configuration on page 4417

Searching for a Geographic Rating Area Preference

Prerequisites

To search for a geographic rating area preference, you should have:

- Values defined in the **FIELD_CAT_FLG** lookup field

Procedure

To search for a geographic rating area preference:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **F** and then click **Field Mapping**.
   A sub-menu appears.
3. Click the **Search** option from the **Field Mapping** sub-menu.
   The **Field Mapping** screen appears.
4. Select the **Geographic Rating Area** option from the **Preference Category** list.
5. Enter the additional search criteria in the **Search Field Mapping** zone.

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> **Note:** ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.

6. Click **Search**.
   A list of geographic rating area preferences that meet the search criteria appears in the **Search Results** section.

Viewing the Geographic Rating Area Preference Details

Procedure

To view the details of a geographic rating area preference:

1. Search for the geographic rating area preference in the **Field Mapping** screen.
2. In the **Search Results** section, click the **Broadcast** (📡) icon corresponding to the geographic rating area preference whose details you want to view.
   The **Field Mapping** zone appears.
3. View the details of the geographic rating area preference in the **Field Mapping** zone.

Related Topics

For more information on...	See...
How to search for a geographic rating area preference	Searching for a Geographic Rating Area Preference on page 140

Defining a Geographic Rating Area Preference

Prerequisites

To define a geographic rating area preference, you should have:

- Values defined in the **ADDRESS_SRC_FLG**, **ADDRESS_TYPE_FLG**, and **MAP_ENTITY_FLG** lookup fields
- Geographic rating areas defined in the application

Procedure

To define a geographic rating area preference:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **F** and then click **Field Mapping**.
   A sub-menu appears.
3. Click the **Add** option from the **Field Mapping** sub-menu.

   The **Select Business Object** screen appears. It contains the following field:

Field Name	Field Description	Mandatory (Yes or No)
Field Mapping Business Object	Used to indicate the business object using which you want to create the geographic rating area preference. The valid values are: • Field Mapping • Medicare Plan Benefit Package	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	• Membership Status Reason Mapping	

Note: Alternatively, you can access the **Select Business Object** screen by clicking the **Add** button in the **Page Title** area of the **Field Mapping** screen.

4. Select the **Field Mapping** option from the **Field Mapping Business Object** list.
5. Click **OK**.

The **Field Mapping** screen appears. It contains the following sections:

- **Main** - Used to specify basic details of the geographic rating area preference. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Preference	Used to specify the geographic rating area preference.	Yes
Description	Used to specify the description for the geographic rating area preference.	Yes
Detailed Description	Used to specify additional information about the geographic rating area preference.	No
Status	Used to indicate the status of the geographic rating area preference. The valid values are: • Active • Inactive	Yes

- **Preference Category** - This section contains the following field:

Field Name	Field Description	Mandatory (Yes or No)
Preference Category	Used to indicate the category to which the preference belongs. The valid values are: • Billing • Binder Payment • Geographic Rating Area • Individual Membership • Medicare • Medicare Plan Benefit • Member Reconciliation • Member Relationship and Subscription Tier • Membership Status Reason • Statement Construct	Yes

- **Preference Settings** - Used to set the attributes in the geographic rating area preference. It contains the following fields in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Attribute	Used to indicate the attribute which you want to set in the geographic rating area preference. The valid values are: • **Address Source Characteristic Type** - Used when the system derives the geographic rating area for a membership.	Yes (Conditional) **Note:** This field is required while setting an attribute in the geographic rating area preference.

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<table>
<tr><th>Field Name</th><th>Field Description</th><th>Mandatory (Yes or No)</th></tr>
<tr><td></td><td>• Address Type Characteristic Type - Used when the system derives the geographic rating area for a membership.
• Default Address Source - Used when the address source characteristic is not defined for any of the following entities:
  • Policy Plan
  • State where the Policy Plan is Issued
  • Policy
  • State where the Policy is Issued
• Default Address Type - Used when the address type characteristic is not defined for any of the following entities:
  • Policy Plan
  • State where the Policy Plan is Issued
  • Policy
  • State where the Policy is Issued
• Default Geographic Rating Area - Used when the system is unable to derive the geographic rating area for the following combination:
  • State and zip code (this combination is considered when the Use Plan Details attribute is set to No)
  • State, zip code, policy number, plan number, and source system (this combination is considered when the Use Plan Details attribute is set to Yes)
• Geographic Rating Area Characteristic Type - Used when the system stores the geographic rating area for a membership.
• Use Plan Details - Used to indicate whether the policy number, plan number, and source system should be considered while deriving the geographic rating area for a membership.</td><td></td></tr>
<tr><td>Value</td><td>Used to specify the attribute value. The attribute value that you can specify varies depending on the attribute you want to set in the geographic rating area preference:<table><tr><th>If the attribute is set to...</th><th>Then, this field is...</th></tr><tr><td>Address Source Characteristic Type</td><td>Used to specify the characteristic type that indicates the address source. The system supports two address sources named Policy Holder and Main Subscriber. This type of characteristic can be defined for the following entities:</td></tr></table></td><td>Yes (Conditional)
Note: This field is required while setting an attribute in the geographic rating area preference.</td></tr>
</table>

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<table>
<tr><th>Field Name</th><th>Field Description</th><th>Mandatory (Yes or No)</th></tr>
<tr><td></td><td>
<table>
<tr><th>If the attribute is set to...</th><th>Then, this field is...</th></tr>
<tr><td></td><td>• Policy Plan
• State where the Policy Plan is Issued
• Policy
• State where the Policy is Issued

Here, you must specify a characteristic type where the characteristic entity is set to Policy Plan, State, and Policy.

Note: The C1-ADSRC characteristic type is shipped with the product.</td></tr>
<tr><td>Address Type Characteristic Type</td><td>Used to specify the characteristic type that indicates the address type. The system supports three address types named Person Mailing, Person Seasonal, and Account Override. This type of characteristic can be defined for the following entities:

• Policy Plan
• State where the Policy Plan is Issued</td></tr>
</table>
</td><td></td></tr>
<tr><td></td><td>
<table>
<tr><td></td><td>• Policy
• State where the Policy is Issued

Here, you must specify a characteristic type where the characteristic entity is set to Policy Plan, State, and Policy.

Note: The C1-ADTYP characteristic type is shipped with the product.</td></tr>
<tr><td>Default Address Source</td><td>Used to specify the address source. The valid values are:

• Main Subscriber
• Policy Holder</td></tr>
</table>
</td><td></td></tr>
</table>

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Field Name	Field Description		Mandatory (Yes or No)
		Note: The list includes only those values which are defined in the **ADDRESS_SRC_FLG** lookup field.	
	Default Address Type	Used to specify the address type. The valid values are: • Person Mailing • Person Seasonal • Account Override	
		Note: The list includes only those values which are defined in the **ADDRESS_TYPE_FLG** lookup field.	
	Default Geographic Rating Area	Used to specify the geographic rating area.	
		Note: Here, you can specify a geographic rating area which is already defined in the system.	
	Geographic Rating Area Characteristic Type	Used to specify the characteristic type where you can store the geographic rating area. This type of characteristic is defined for the membership. Here, you must specify a characteristic type where the characteristic entity is set to **Membership**.	
		Note: The **C1-GEORT** characteristic type is shipped with the product.	
	Use Plan Details	Used to indicate whether the policy plan details should be considered while deriving the geographic rating area for a membership. The valid values are: • **Yes** - Used when you want to derive the geographic rating area using the state, zip code, policy number,	

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Field Name	Field Description	Mandatory (Yes or No)
	plan number, and source system combination. • **No** - Used when you want to derive the geographic rating area using the state and zip code combination.	
Entity Type	Used to indicate the type of entity for which the attribute is applicable. The valid values are: • Account • Billable Charge **Note:** At present, this data is stored for informational purposes only and is not considered in the business logic. If required, you can add more entity types to the **MAP_ENTITY_FLG** lookup field.	No

Note: While defining a geographic rating area preference, you must set at least one attribute in the geographic rating area preference.

6. Select the **Geographic Rating Area** option from the **Preference Category** list.
7. Enter the required details in the **Main** section.
8. Select the required attribute and value from the respective fields.
9. If you want to set more than one attribute in the geographic rating area preference, click the **Add** (+) icon and then repeat step 8.

Note: However, if you want to remove an attribute from the geographic rating area preference, click the **Delete** (🗑) icon corresponding to the attribute.

10. Click **Save**.
    The geographic rating area preference is defined.

Editing a Geographic Rating Area Preference

Prerequisites

To edit a geographic rating area preference, you should have:

- Values defined in the **ADDRESS_SRC_FLG**, **ADDRESS_TYPE_FLG**, and **MAP_ENTITY_FLG** lookup fields
- Geographic rating areas defined in the application

Procedure

To edit a geographic rating area preference:

1. Search for the geographic rating area preference in the **Field Mapping** screen.
2. In the **Search Results** section, click the **Edit** (✎) icon in the **Edit** column *c*orresponding to the geographical rating area preference whose details you want to edit.

   The **Field Mapping** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details of the geographic rating area preference. It contains the following fields:

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Field Name	Field Description	Mandatory (Yes or No)
Preference	Displays the geographic rating area preference.	Not applicable
Description	Used to specify the description for the geographic rating area preference.	Yes
Detailed Description	Used to specify additional information about the geographic rating area preference.	No
Status	Used to indicate the status of the geographic rating area preference. The valid values are: • Active • Inactive	Yes
Preference Category	Indicates the category to which the preference belongs. The valid value is: • Geographic Rating Area	Not applicable

- **Preference Settings** - Used to set the attributes in the geographic rating area preference. It contains the following fields in a grid:

Field Name	Field Description	Mandatory (Yes or No)

Attribute	Used to indicate the attribute which you want to set in the geographic rating area preference. The valid values are:
	• **Address Source Characteristic Type** - Used when the system derives the geographic rating area for a membership.
	• **Address Type Characteristic Type** - Used when the system derives the geographic rating area for a membership.
	• **Default Address Source** - Used when the address source characteristic is not defined for any of the following entities:
	  • Policy Plan
	  • State where the Policy Plan is Issued
	  • Policy
	  • State where the Policy is Issued
	• **Default Address Type** - Used when the address type characteristic is not defined for any of the following entities:
	  • Policy Plan
	  • State where the Policy Plan is Issued
	  • Policy
	  • State where the Policy is Issued
		Yes (Conditional)
		Note: This field is required while setting an attribute in the geographic rating area preference.

	• **Default Geographic Rating Area** - Used when the system is unable to derive the geographic rating area for the following combination:	

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<table>
<tr><th>Field Name</th><th>Field Description</th><th>Mandatory (Yes or No)</th></tr>
<tr><td></td><td>

State and zip code (this combination is considered when the Use Plan Details attribute is set to No)
State, zip code, policy number, plan number, and source system (this combination is considered when the Use Plan Details attribute is set to Yes)

Geographic Rating Area Characteristic Type - Used when the system stores the geographic rating area for a membership.
Use Plan Details - Used to indicate whether the policy number, plan number, and source system should be considered while deriving the geographic rating area for a membership.

</td><td></td></tr>
<tr><td>Value</td><td>Used to specify the attribute value. The attribute value that you can specify varies depending on the attribute you want to set in the geographic rating area preference:
<table>
<tr><th>If the attribute is set to...</th><th>Then, this field is...</th></tr>
<tr><td>Address Source Characteristic Type</td><td>Used to specify the characteristic type that indicates the address source. The system supports two address sources named Policy Holder and Main Subscriber. This type of characteristic can be defined for the following entities:
Policy Plan
State where the Policy Plan is Issued
Policy
State where the Policy is Issued</td></tr>
<tr><td></td><td>Here, you must specify a characteristic type where the characteristic entity is set to Policy Plan, State, and Policy.
Note: The C1-ADSRC characteristic type is shipped with the product.</td></tr>
<tr><td>Address Type Characteristic Type</td><td>Used to specify the characteristic type that indicates the address type.</td></tr>
</table>
</td><td>Yes (Conditional)
Note: This field is required while setting an attribute in the geographic rating area preference.</td></tr>
</table>

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Field Name	Field Description		Mandatory (Yes or No)
		The system supports three address types named **Person Mailing**, **Person Seasonal**, and **Account Override**. This type of characteristic can be defined for the following entities: • Policy Plan • State where the Policy Plan is Issued • Policy • State where the Policy is Issued Here, you must specify a characteristic type where the characteristic entity is set to **Policy Plan**, **State**, and **Policy**. **Note:** The **C1-ADTYP** characteristic type is shipped with the product.	
	Default Address Source	Used to specify the address source. The valid values are: • Main Subscriber • Policy Holder **Note:** The list includes only those values which are defined in the **ADDRESS_SRC_FLG** lookup field.	
	Default Address Type	Used to specify the address type. The valid values are: • Person Mailing • Person Seasonal • Account Override **Note:** The list includes only those values which are defined in the **ADDRESS_TYPE_FLG** lookup field.	
	Default Geographic Rating Area	Used to specify the geographic rating area.	

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<table>
<tr><th>Field Name</th><th>Field Description</th><th>Mandatory (Yes or No)</th></tr>
<tr><td></td><td>
<table>
<tr><td></td><td>Note: Here, you can specify a geographic rating area which is already defined in the system.</td></tr>
<tr><td>Geographic Rating Area Characteristic Type</td><td>Used to specify the characteristic type where you can store the geographic rating area. This type of characteristic is defined for the membership. Here, you must specify a characteristic type where the characteristic entity is set to Membership.

Note: The C1-GEORT characteristic type is shipped with the product.</td></tr>
<tr><td>Use Plan Details</td><td>Used to indicate whether the policy plan details should be considered while deriving the geographic rating area for a membership.</td></tr>
</table>
</td><td></td></tr>
<tr><td></td><td>
<table>
<tr><td></td><td>The valid values are:
• Yes - Used when you want to derive the geographic rating area using the state, zip code, policy number, plan number, and source system combination.
• No - Used when you want to derive the geographic rating area using the state and zip code combination.</td></tr>
</table>
</td><td></td></tr>
<tr><td>Entity Type</td><td>Used to indicate the type of entity for which the attribute is applicable. The valid values are:
• Account
• Billable Charge

Note: At present, this data is stored for informational purposes only and is not considered in the business logic. If required, you can add more entity types to the MAP_ENTITY_FLG lookup field.</td><td>No</td></tr>
</table>

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> **Tip:** Alternatively, you can edit the details of a geographic rating area preference by clicking the **Edit** button in the **Field Mapping** zone.

3. Modify the required details in the **Main** section.
4. Define, edit, or remove the attribute from the geographic rating area preference, if required.

> **Note:** You must set at least one attribute in a geographic rating area preference.

5. Click **Save**.
   The changes made to the geographic rating area preference are saved.

Related Topics

For more information on...	See...
How to search for a geographic rating area preference	Searching for a Geographic Rating Area Preference on page 140

Copying a Geographic Rating Area Preference

Instead of creating a geographic rating area preference from scratch, you can create a new geographic rating area preference using an existing geographic rating area preference. This is possible through copying a geographic rating area preference. On copying a geographic rating area preference, the details including the attributes are copied to the new geographic rating area preference. You can then edit the details, if required.

Prerequisites

To copy a geographic rating area preference, you should have:

- Geographic rating area preference (whose copy you want to create) defined in the application
- Values defined in the **ADDRESS_SRC_FLG**, **ADDRESS_TYPE_FLG**, and **MAP_ENTITY_FLG** lookup fields
- Geographic rating areas defined in the application

Procedure

To copy a geographic rating area preference:

1. Search for the geographic rating area preference in the **Field Mapping** screen.
2. In the **Search Results** section, click the **Duplicate** (⧉) icon in the **Duplicate** column corresponding to the geographical rating area preference whose copy you want to create.

   The **Field Mapping** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details of the geographic rating area preference. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Preference	Used to specify the geographic rating area preference.	Yes
Description	Used to specify the description for the geographic rating area preference.	Yes
Detailed Description	Used to specify additional information about the geographic rating area preference.	No
Status	Used to indicate the status of the geographic rating area preference. The valid values are: • Active • Inactive	Yes

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Field Name	Field Description	Mandatory (Yes or No)
Preference Category	Indicates the category to which the preference belongs. The valid value is: • Geographic Rating Area	Not applicable

- **Preference Settings** - Used to set the attributes in the geographic rating area preference. It contains the following fields in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Attribute	Used to indicate the attribute which you want to set in the geographic rating area preference. The valid values are: • **Address Source Characteristic Type** - Used when the system derives the geographic rating area for a membership.	Yes (Conditional) **Note:** This field is required while setting an attribute in the geographic rating area preference.

	• **Address Type Characteristic Type** - Used when the system derives the geographic rating area for a membership.
	• **Default Address Source** - Used when the address source characteristic is not defined for any of the following entities:
	  • Policy Plan
	  • State where the Policy Plan is Issued
	  • Policy
	  • State where the Policy is Issued
	• **Default Address Type** - Used when the address type characteristic is not defined for any of the following entities:
	  • Policy Plan
	  • State where the Policy Plan is Issued
	  • Policy
	  • State where the Policy is Issued
	• **Default Geographic Rating Area** - Used when the system is unable to derive the geographic rating area for the following combination:
	  • State and zip code (this combination is considered when the **Use Plan Details** attribute is set to **No**)
	  • State, zip code, policy number, plan number, and source system (this combination is considered when the **Use Plan Details** attribute is set to **Yes**)
	• **Geographic Rating Area Characteristic Type** - Used when the system stores the geographic rating area for a membership.
	• **Use Plan Details** - Used to indicate whether the policy number, plan number, and source system should be considered while deriving the geographic rating area for a membership.	

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<table>
<tr><th>Field Name</th><th>Field Description</th><th>Mandatory (Yes or No)</th></tr>
<tr><td>Value</td><td>Used to specify the attribute value. The attribute value that you can specify varies depending on the attribute you want to set in the geographic rating area preference:
<table><tr><th>If the attribute is set to...</th><th>Then, this field is...</th></tr><tr><td>Address Source Characteristic Type</td><td>Used to specify the characteristic type that indicates the address source. The system supports two address sources named Policy Holder and Main Subscriber. This type of characteristic can be defined for the following entities:
• Policy Plan
• State where the Policy Plan is Issued
• Policy
• State where the Policy is Issued
Here, you must specify a characteristic type where the characteristic entity is set to Policy Plan, State, and Policy.
Note: The C1-ADSRC characteristic type is shipped with the product.</td></tr><tr><td>Address Type Characteristic Type</td><td>Used to specify the characteristic type that indicates the address type. The system supports three address types named Person Mailing, Person Seasonal, and Account Override. This type of characteristic can be defined for the following entities:
• Policy Plan
• State where the Policy Plan is Issued</td></tr></table></td><td>Yes (Conditional)
Note: This field is required while setting an attribute in the geographic rating area preference.</td></tr>
<tr><td></td><td><table><tr><td></td><td>• Policy
• State where the Policy is Issued</td></tr></table></td><td></td></tr>
</table>

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Field Name	Field Description		Mandatory (Yes or No)
		Here, you must specify a characteristic type where the characteristic entity is set to **Policy Plan**, **State**, and **Policy**. **Note:** The **C1-ADTYP** characteristic type is shipped with the product.	
	Default Address Source	Used to specify the address source. The valid values are: • Main Subscriber • Policy Holder **Note:** The list includes only those values which are defined in the **ADDRESS_SRC_FLG** lookup field.	
	Default Address Type	Used to specify the address type. The valid values are: • Person Mailing • Person Seasonal • Account Override **Note:** The list includes only those values which are defined in the **ADDRESS_TYPE_FLG** lookup field.	
	Default Geographic Rating Area	Used to specify the geographic rating area. **Note:** Here, you can specify a geographic rating area which is already defined in the system.	
	Geographic Rating Area Characteristic Type	Used to specify the characteristic type where you can store the geographic rating area. This type of characteristic is defined for the membership. Here, you must specify a characteristic type where the characteristic entity is set to **Membership**.	

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Field Name	Field Description		Mandatory (Yes or No)
		Note: The **C1-GEORT** characteristic type is shipped with the product.	
	Use Plan Details	Used to indicate whether the policy plan details should be considered while deriving the geographic rating area for a membership. The valid values are: • **Yes** - Used when you want to derive the geographic rating area using the state, zip code, policy number, plan number, and source system combination. • **No** - Used when you want to derive the geographic rating area using the state and zip code combination.	
Entity Type	Used to indicate the type of entity for which the attribute is applicable. The valid values are: • Account • Billable Charge		No
	Note: At present, this data is stored for informational purposes only and is not considered in the business logic. If required, you can add more entity types to the **MAP_ENTITY_FLG** lookup field.		

Note: While defining a geographic rating area preference, you must set at least one attribute in the geographic rating area preference.

Tip: Alternatively, you can copy a geographic rating area preference by clicking the **Duplicate** button in the **Field Mapping** zone.

3. Enter the required details in the **Main** section.
4. Define, edit, or remove the attribute from the geographic rating area preference, if required.
5. Click **Save**.
   The new geographic rating area preference is defined.

Related Topics

For more information on...	See...
How to search for a geographic rating area preference	Searching for a Geographic Rating Area Preference on page 140

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Deleting a Geographic Rating Area Preference

Procedure

To delete a geographic rating area preference:

1. Search for the geographic rating area preference in the **Field Mapping** screen.
2. In the **Search Results** section, click the **Delete** (🗑) icon in the **Delete** column corresponding to the geographic rating area preference that you want to delete.
   A message appears confirming whether you want to delete the geographic rating area preference.

> **Tip:** Alternatively, you can delete a geographic rating area preference by clicking the **Delete** button in the **Field Mapping** zone.

3. Click **OK**.
   The geographic rating area preference is deleted.

Related Topics

For more information on...	See...
How to search for a geographic rating area preference	Searching for a Geographic Rating Area Preference on page 140

Member Relationship and Subscription Tier Preference

Oracle Revenue Management and Billing enables you to use the member relationship (i.e. how a member is related to the main subscriber of the membership) as a pricing parameter while defining the age based, tier based, and additional fee pricing rules. This feature facilitates you to offer different rates for a price item based on different member relationship.

While adding a membership to a policy plan or while adding or inactivating a member person in a membership, the system automatically derives the member relationship for each member person of the membership from a member relationship structure. While deriving the member relationship for a member person, the system uses the following attributes from the member relationship and subscription tier preference:

- Age Calculation Date Basis Characteristic Type
- Max Age Limit for Max Dependent Count Characteristic Type
- Max Number of Dependents Order Priority Characteristic Type
- Member Relationship Characteristic Type
- Maximum Number of Dependents Characteristic Type
- Member Relationship Derivation Date Characteristic Type
- Member Relationship Structure Characteristic Type
- New Born Gift Days Characteristic Type
- New Born Gift Days Applicability Characteristic Type
- Young Adult Max Age Limit Characteristic Type
- Young Adult Max Age Limit Applicability Characteristic Type

For more information about these attributes, see Defining a Member Relationship and Subscription Tier Preference on page 158.

Similarly, the system enables you to use the membership subscription tier as a pricing parameter while defining the tier based pricing rules. This feature facilitates you to offer different rates for a price item based on different membership subscription tier.

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While determining the subscription tier for a membership, the system derives the subscription tier for the membership from a subscription tier structure. While deriving the subscription tier for a membership, the system uses the following attributes from the member relationship and subscription tier preference:

- Age Calculation Date Basis Characteristic Type
- Max Age Limit for Max Dependent Count Characteristic Type
- Max Number of Dependents Order Priority Characteristic Type
- Maximum Number of Dependents Characteristic Type
- New Born Gift Days Characteristic Type
- New Born Gift Days Applicability Characteristic Type
- Subscription Tier Structure Characteristic Type
- Subscription Tier Characteristic Type
- Young Adult Max Age Limit Characteristic Type
- Young Adult Max Age Limit Applicability Characteristic Type

For more information about these attributes, see Defining a Member Relationship and Subscription Tier Preference on page 158.

The system considers the member relationship and subscription tier preference which is specified in the **Relation Structure Code Field Mapping** option type of the **C1-ASOBLLNG** feature configuration. You can define, edit, delete, and copy a member relationship and subscription tier preference through the **Field Mapping** screen.

Related Topics

For more information on...	See...
How to setup the **C1-ASOBLLNG** feature configuration	Setting the C1-ASOBLLNG Feature Configuration on page 4417

Searching for a Member Relationship and Subscription Tier Preference

Prerequisites

To search for a member relationship and subscription tier preference, you should have:

- Values defined in the **FIELD_CAT_FLG** lookup field

Procedure

To search for a member relationship and subscription tier preference:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **F** and then click **Field Mapping**.
   A sub-menu appears.
3. Click the **Search** option from the **Field Mapping** sub-menu.
   The **Field Mapping** screen appears.
4. Select the **Member Relationship and Subscription Tier Preferences** option from the **Preference Category** list.
5. Enter the additional search criteria in the **Search Field Mapping** zone.

> **Note:** ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.

6. Click **Search**.

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A list of member relationship and subscription tier preferences that meet the search criteria appears in the **Search Results** section.

Viewing the Member Relationship and Subscription Tier Preference Details

Procedure

To view the details of a member relationship and subscription tier preference:

1. Search for the member relationship and subscription tier preference in the **Field Mapping** screen.
2. In the **Search Results** section, click the **Broadcast** (ᯤ) icon corresponding to the member relationship and subscription tier preference whose details you want to view.
   The **Field Mapping** zone appears.
3. View the details of the member relationship and subscription tier preference in the **Field Mapping** zone.

Related Topics

For more information on...	See...
How to search for a member relationship and subscription tier preference	Searching for a Member Relationship and Subscription Tier Preference on page 157

Defining a Member Relationship and Subscription Tier Preference

Prerequisites

To define a member relationship and subscription tier preference, you should have:

- Required characteristic types defined in the application
- Values defined in the **MAP_ENTITY_FLG** lookup field

Procedure

To define a member relationship and subscription tier preference:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **F** and then click **Field Mapping**.
   A sub-menu appears.
3. Click the **Add** option from the **Field Mapping** sub-menu.

   The **Select Business Object** screen appears. It contains the following field:

Field Name	Field Description	Mandatory (Yes or No)
Field Mapping Business Object	Used to indicate the business object using which you want to create the member relationship and subscription tier preference. The valid values are: • Field Mapping • Medicare Plan Benefit Package • Membership Status Reason Mapping	Yes

Note: Alternatively, you can access the **Select Business Object** screen by clicking the **Add** button in the **Page Title** area of the **Field Mapping** screen.

4. Select the **Field Mapping** option from the **Field Mapping Business Object** list.

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5. Click **OK**.

   The **Field Mapping** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details of the member relationship and subscription tier preference. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Preference	Used to specify the member relationship and subscription tier preference.	Yes
Description	Used to specify the description for the member relationship and subscription tier preference.	Yes
Detailed Description	Used to specify additional information about the member relationship and subscription tier preference.	No
Status	Used to indicate the status of the member relationship and subscription tier preference. The valid values are: • Active • Inactive	Yes

   - **Preference Category** - This section contains the following field:

Field Name	Field Description	Mandatory (Yes or No)
Preference Category	Used to indicate the category to which the preference belongs. The valid values are: • Billing • Binder Payment • Geographic Rating Area • Individual Membership • Medicare • Medicare Plan Benefit • Member Reconciliation • Member Relationship and Subscription Tier • Membership Status Reason • Statement Construct	Yes

   - **Preference Settings** - Used to set the attributes in the member relationship and subscription tier preference. It contains the following fields in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Attribute	Used to indicate the attribute which you want to set in the member relationship and subscription tier preference. The valid values are: • **Age Calculation Date Basis Characteristic Type** - Used when the system derives the member relationship for a member person and the subscription tier for a membership. • **Max Age Limit for Max Dependent Count Characteristic Type** - Used when the system derives the member relationship for a member person and the subscription tier for a membership.	Yes (Conditional) **Note:** This field is required while setting an attribute in the member relationship and subscription tier preference.

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<table>
<tr><th>Field Name</th><th>Field Description</th><th>Mandatory (Yes or No)</th></tr>
<tr><td></td><td>• Max Number of Dependents Order Priority Characteristic Type - Used when the system derives the member relationship for a member person and the subscription tier for a membership.</td><td></td></tr>
<tr><td></td><td>• Member Relationship Characteristic Type - Used when the system stores the member relationship for a member person.
• Maximum Number of Dependents Characteristic Type - Used when the system derives the member relationship for a member person and the subscription tier for a membership.
• Member Relationship Derivation Date Characteristic Type - Used when the system derives the member relationship for a member person.
• Member Relationship Structure Characteristic Type - Used when the system derives the member relationship for a member person.
• New Born Gift Days Characteristic Type - Used when the system derives the member relationship for a member person and the subscription tier for a membership.
• New Born Gift Days Applicability Characteristic Type - Used when the system derives the member relationship for a member person and the subscription tier for a membership.
• Subscription Tier Structure Characteristic Type - Used when the system derives the subscription tier for a membership.
• Subscription Tier Characteristic Type - Used when the system stores the subscription tier for a membership.
• Young Adult Max Age Limit Characteristic Type - Used when the system derives the member relationship for a member person and the subscription tier for a membership.
• Young Adult Max Age Limit Applicability Characteristic Type - Used when the system derives the member relationship for a member person and the subscription tier for a membership.</td><td></td></tr>
<tr><td>Value</td><td>Used to specify the attribute value. The attribute value that you can specify varies depending on the attribute you want to set in the member relationship and subscription tier preference:
<table><tr><th>If the attribute is set to...</th><th>Then, this field is...</th></tr><tr><td>Age Calculation Date Basis Characteristic Type</td><td>Used to specify the characteristic type that indicates how the member person's age should be</td></tr></table></td><td>Yes (Conditional)
Note: This field is required while setting an attribute in the member relationship and subscription tier preference.</td></tr>
</table>

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<table>
<tr><th>Field Name</th><th>Field Description</th><th>Mandatory (Yes or No)</th></tr>
<tr><td></td><td>
<table>
<tr><th>If the attribute is set to...</th><th>Then, this field is...</th></tr>
<tr><td></td><td>calculated. The system supports the following characteristic values:
• Member Enrollment Date
• Member Enrollment Nearest Age
• Plan Start Date
• Policy Renewal/Start Date
This type of characteristic can be defined for the following entities:
• Policy Plan
• Policy
Here, you must specify a characteristic type where the characteristic entity is set to Policy Plan and Policy.</td></tr>
<tr><td></td><td>Note: The C1-AGCAL characteristic type is shipped with the product.</td></tr>
<tr><td>Max Age Limit for Max Dependent Count Characteristic Type</td><td>Used to specify the characteristic type that indicates the maximum age limit for children which are eligible for premium calculation. This type of characteristic can be defined for the following entities:
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• Policy</td></tr>
</table>
</td><td></td></tr>
<tr><td></td><td>
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<tr><td></td><td>Here, you must specify a characteristic type where the characteristic entity is set to Policy Plan and Policy.</td></tr>
<tr><td>Max Number of Dependents Order Priority Characteristic Type</td><td>Used to specify the characteristic type that indicates whether the system should first consider youngest or eldest children during premium calculation. The system supports the following two characteristic values - Youngest and Eldest. This</td></tr>
</table>
</td><td></td></tr>
</table>

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Field Name	Field Description		Mandatory (Yes or No)
		type of characteristic can be defined for the following entities: • Policy Plan • Policy Here, you must specify a characteristic type where the characteristic entity is set to **Policy Plan** and **Policy**.	
		Note: The **DEPORPRI** characteristic type is shipped with the product.	
	Member Relationship Characteristic Type	Used to specify the characteristic type where you can store the member relationship for a member person. This type of characteristic is defined for the member person. Here, you must specify a characteristic type where the characteristic entity is set to **Membership Person**.	
		Note: The **C1-MEMRL** characteristic type is shipped with the product.	
	Maximum Number of Dependents Characteristic Type	Used to specify the characteristic type that indicates the maximum number of dependent persons which are eligible for premium calculation. This type of characteristic can be defined for the following entities: • Policy Plan • Policy Here, you must specify a characteristic type where the characteristic entity is set to **Policy Plan** and **Policy**.	
	Member Relationship Derivation Date Characteristic Type	Used to specify the characteristic type that indicates whether the member relationship should be derived for a member person using	

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Field Name	Field Description		Mandatory (Yes or No)
		its date of birth or enrollment date. The system supports the following two characteristic values - **Date of Birth** and **Enrollment Date**. This type of characteristic can be defined for the following entities: • Policy Plan • Policy Here, you must specify a characteristic type where the characteristic entity is set to **Policy Plan** and **Policy**. **Note:** The **C1-MRDDB** characteristic type is shipped with the product.	
	Member Relationship Structure Characteristic Type	Used to specify the characteristic type that indicates the member relationship structure which should be considered while deriving the member relationship for a member person. This type of characteristic can be defined for the following entities: • Policy Plan • Policy Here, you must specify a characteristic type where the characteristic entity is set to **Policy Plan** and **Policy**. **Note:** The **C1-MRLST** characteristic type is shipped with the product.	
	New Born Gift Days Characteristic Type	Used to specify the characteristic type that indicates the number of days you want to offer as gift days from the new born child's birth date. This type of characteristic can be defined for the following entities: • Policy Plan • Policy	

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Field Name	Field Description		Mandatory (Yes or No)
		Here, you must specify a characteristic type where the characteristic entity is set to **Policy Plan** and **Policy**. **Note:** The **NOOFGIFT** characteristic type is shipped with the product. Here, you must define the required predefined characteristic values.	
	New Born Gift Days Applicability Characteristic Type	Used to specify the characteristic type that indicates whether you want to offer gift days in case of a new born. The system supports the following two characteristic values - **Y** and **N**. This type of characteristic can be defined for the following entities: • Policy Plan • Policy Here, you must specify a characteristic type where the characteristic entity is set to **Policy Plan** and **Policy**. **Note:** The **NEWBORNA** characteristic type is shipped with the product.	
	Subscription Tier Structure Characteristic Type	Used to specify the characteristic type that indicates the subscription tier structure which should be considered while deriving the subscription tier for a membership. This type of characteristic can be defined for the following entities: • Policy Plan • Policy Here, you must specify a characteristic type where the characteristic entity is set to **Policy Plan** and **Policy**.	

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Field Name	Field Description		Mandatory (Yes or No)
		Note: The **C1-STRST** characteristic type is shipped with the product.	
	Subscription Tier Characteristic Type	Used to specify the characteristic type where you can store the subscription tier for a membership. This type of characteristic is defined for the membership. Here, you must specify a characteristic type where the characteristic entity is set to **Membership**.	
		Note: The **C1-SUBST** characteristic type is shipped with the product.	
	Young Adult Max Age Limit Characteristic Type	Used to specify the characteristic type that indicates the maximum age limit for young adults which are eligible for premium calculation. This type of characteristic can be defined for the following entities: • Policy Plan • Policy Here, you must specify a characteristic type where the characteristic entity is set to **Policy Plan** and **Policy**.	
		Note: The **YADULTAG** characteristic type is shipped with the product. Here, you must define the required predefined characteristic values.	
	Young Adult Max Age Limit Applicability Characteristic Type	Used to specify the characteristic type that indicates whether you want to consider the young adults during the premium calculation. The system supports the following two characteristic values - **Y** and **N**.	

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Field Name	Field Description	Mandatory (Yes or No)
	This type of characteristic can be defined for the following entities: • Policy Plan • Policy Here, you must specify a characteristic type where the characteristic entity is set to **Policy Plan** and **Policy**.	
Entity Type	Used to indicate the type of entity for which the attribute is applicable. The valid values are: • Account • Billable Charge **Note:** At present, this data is stored for informational purposes only and is not considered in the business logic. If required, you can add more entity types to the **MAP_ENTITY_FLG** lookup field.	No

Note: While defining a member relationship and subscription tier preference, you must set at least one attribute in the member relationship and subscription tier preference.

6. Select the **Member Relationship and Subscription Tier Preferences** option from the **Preference Category** list.
7. Enter the required details in the **Main** section.
8. Select the required attribute and value from the respective fields.
9. If you want to set more than one attribute in the member relationship and subscription tier preference, click the **Add** (+) icon and then repeat step 8.

Note: However, if you want to remove an attribute from the member relationship and subscription tier preference, click the **Delete** (🗑) icon corresponding to the attribute.

10. Click **Save**.
    The member relationship and subscription tier preference is defined.

Editing a Member Relationship and Subscription Tier Preference

Prerequisites

To edit a member relationship and subscription tier preference, you should have:

- Required characteristic types defined in the application
- Values defined in the **MAP_ENTITY_FLG** lookup field

Procedure

To edit a member relationship and subscription tier preference:

1. Search for the member relationship and subscription tier preference in the **Field Mapping** screen.
2. In the **Search Results** section, click the **Edit** (✎) icon in the **Edit** column corresponding to the member relationship and subscription tier preference whose details you want to edit.

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The **Field Mapping** screen appears. It contains the following sections:

- **Main** - Used to specify basic details of the member relationship and subscription tier preference. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Preference	Displays the member relationship and subscription tier preference.	Not applicable
Description	Used to specify the description for the member relationship and subscription tier preference.	Yes
Detailed Description	Used to specify additional information about the member relationship and subscription tier preference.	No
Status	Used to indicate the status of the member relationship and subscription tier preference. The valid values are: • Active • Inactive	Yes
Preference Category	Indicates the category to which the preference belongs. The valid value is: • Member Relationship and Subscription Tier	Not applicable

- **Preference Settings** - Used to set the attributes in the member relationship and subscription tier preference. It contains the following fields in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Attribute	Used to indicate the attribute which you want to set in the member relationship and subscription tier preference. The valid values are: • **Age Calculation Date Basis Characteristic Type** - Used when the system derives the member relationship for a member person and the subscription tier for a membership. • **Max Age Limit for Max Dependent Count Characteristic Type** - Used when the system derives the member relationship for a member person and the subscription tier for a membership. • **Max Number of Dependents Order Priority Characteristic Type** - Used when the system derives the member relationship for a member person and the subscription tier for a membership.	Yes (Conditional) **Note:** This field is required while setting an attribute in the member relationship and subscription tier preference.
	• **Member Relationship Characteristic Type** - Used when the system stores the member relationship for a member person. • **Maximum Number of Dependents Characteristic Type** - Used when the system derives the member relationship for a member person and the subscription tier for a membership. • **Member Relationship Derivation Date Characteristic Type** - Used when the system	

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<table>
<tr><th>Field Name</th><th>Field Description</th><th>Mandatory (Yes or No)</th></tr>
<tr><td></td><td>derives the member relationship for a member person.
• Member Relationship Structure Characteristic Type - Used when the system derives the member relationship for a member person.
• New Born Gift Days Characteristic Type - Used when the system derives the member relationship for a member person and the subscription tier for a membership.
• New Born Gift Days Applicability Characteristic Type - Used when the system derives the member relationship for a member person and the subscription tier for a membership.
• Subscription Tier Structure Characteristic Type - Used when the system derives the subscription tier for a membership.
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<tr><td>Value</td><td>Used to specify the attribute value. The attribute value that you can specify varies depending on the attribute you want to set in the member relationship and subscription tier preference:<table><tr><th>If the attribute is set to...</th><th>Then, this field is...</th></tr><tr><td>Age Calculation Date Basis Characteristic Type</td><td>Used to specify the characteristic type that indicates how the member person's age should be calculated. The system supports the following characteristic values:
• Member Enrollment Date
• Member Enrollment Nearest Age
• Plan Start Date
• Policy Renewal/Start Date
This type of characteristic can be defined for the following entities:
• Policy Plan</td></tr></table></td><td>Yes (Conditional)
Note: This field is required while setting an attribute in the member relationship and subscription tier preference.</td></tr>
</table>

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<table>
<tr><th>Field Name</th><th>Field Description</th><th>Mandatory (Yes or No)</th></tr>
<tr><td></td><td>
<table>
<tr><th>If the attribute is set to...</th><th>Then, this field is...</th></tr>
<tr><td></td><td>• Policy

Here, you must specify a characteristic type where the characteristic entity is set to Policy Plan and Policy.

Note: The C1-AGCAL characteristic type is shipped with the product.</td></tr>
<tr><td>Max Age Limit for Max Dependent Count Characteristic Type</td><td>Used to specify the characteristic type that indicates the maximum age limit for children which are eligible for premium calculation. This type of characteristic can be defined for the following entities:

• Policy Plan
• Policy</td></tr>
</table>
</td><td></td></tr>
<tr><td></td><td>
<table>
<tr><td></td><td>Here, you must specify a characteristic type where the characteristic entity is set to Policy Plan and Policy.</td></tr>
<tr><td>Max Number of Dependents Order Priority Characteristic Type</td><td>Used to specify the characteristic type that indicates whether the system should first consider youngest or eldest children during premium calculation. The system supports the following two characteristic values - Youngest and Eldest. This type of characteristic can be defined for the following entities:

• Policy Plan
• Policy

Here, you must specify a characteristic type where the characteristic entity is set to Policy Plan and Policy.</td></tr>
</table>
</td><td></td></tr>
</table>

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Field Name	Field Description		Mandatory (Yes or No)
		Note: The **DEPORPRI** characteristic type is shipped with the product.	
	Member Relationship Characteristic Type	Used to specify the characteristic type where you can store the member relationship for a member person. This type of characteristic is defined for the member person. Here, you must specify a characteristic type where the characteristic entity is set to **Membership Person**.	
		Note: The **C1-MEMRL** characteristic type is shipped with the product.	
	Maximum Number of Dependents Characteristic Type	Used to specify the characteristic type that indicates the maximum number of dependent persons which are eligible for premium calculation. This type of characteristic can be defined for the following entities: • Policy Plan • Policy Here, you must specify a characteristic type where the characteristic entity is set to **Policy Plan** and **Policy**.	
	Member Relationship Derivation Date Characteristic Type	Used to specify the characteristic type that indicates whether the member relationship should be derived for a member person using its date of birth or enrollment date. The system supports the following two characteristic values - **Date of Birth** and **Enrollment Date**. This type of characteristic can be defined for the following entities: • Policy Plan	

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Field Name	Field Description		Mandatory (Yes or No)
		• Policy Here, you must specify a characteristic type where the characteristic entity is set to **Policy Plan** and **Policy**. **Note:** The **C1-MRDDB** characteristic type is shipped with the product.	
	Member Relationship Structure Characteristic Type	Used to specify the characteristic type that indicates the member relationship structure which should be considered while deriving the member relationship for a member person. This type of characteristic can be defined for the following entities: • Policy Plan • Policy Here, you must specify a characteristic type where the characteristic entity is set to **Policy Plan** and **Policy**. **Note:** The **C1-MRLST** characteristic type is shipped with the product.	
	New Born Gift Days Characteristic Type	Used to specify the characteristic type that indicates the number of days you want to offer as gift days from the new born child's birth date. This type of characteristic can be defined for the following entities: • Policy Plan • Policy Here, you must specify a characteristic type where the characteristic entity is set to **Policy Plan** and **Policy**.	

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Field Name	Field Description		Mandatory (Yes or No)
		Note: The **NOOFGIFT** characteristic type is shipped with the product. Here, you must define the required predefined characteristic values.	
	New Born Gift Days Applicability Characteristic Type	Used to specify the characteristic type that indicates whether you want to offer gift days in case of a new born. The system supports the following two characteristic values - **Y** and **N**. This type of characteristic can be defined for the following entities: • Policy Plan • Policy Here, you must specify a characteristic type where the characteristic entity is set to **Policy Plan** and **Policy**.	
		Note: The **NEWBORNA** characteristic type is shipped with the product.	
	Subscription Tier Structure Characteristic Type	Used to specify the characteristic type that indicates the subscription tier structure which should be considered while deriving the subscription tier for a membership. This type of characteristic can be defined for the following entities: • Policy Plan • Policy Here, you must specify a characteristic type where the characteristic entity is set to **Policy Plan** and **Policy**.	
		Note: The **C1-STRST** characteristic type is shipped with the product.	

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Field Name	Field Description		Mandatory (Yes or No)
	Subscription Tier Characteristic Type	Used to specify the characteristic type where you can store the subscription tier for a membership. This type of characteristic is defined for the membership. Here, you must specify a characteristic type where the characteristic entity is set to **Membership**. **Note:** The **C1-SUBST** characteristic type is shipped with the product.	
	Young Adult Max Age Limit Characteristic Type	Used to specify the characteristic type that indicates the maximum age limit for young adults which are eligible for premium calculation. This type of characteristic can be defined for the following entities: • Policy Plan • Policy Here, you must specify a characteristic type where the characteristic entity is set to **Policy Plan** and **Policy**. **Note:** The **YADULTAG** characteristic type is shipped with the product. Here, you must define the required predefined characteristic values.	
	Young Adult Max Age Limit Applicability Characteristic Type	Used to specify the characteristic type that indicates whether you want to consider the young adults during the premium calculation. The system supports the following two characteristic values - **Y** and **N**. This type of characteristic can be defined for the following entities: • Policy Plan • Policy	

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Field Name	Field Description	Mandatory (Yes or No)
	Here, you must specify a characteristic type where the characteristic entity is set to **Policy Plan** and **Policy**.	
Entity Type	Used to indicate the type of entity for which the attribute is applicable. The valid values are: • Account • Billable Charge **Note:** At present, this data is stored for informational purposes only and is not considered in the business logic. If required, you can add more entity types to the **MAP_ENTITY_FLG** lookup field.	No

Tip: Alternatively, you can edit the details of a member relationship and subscription tier preference by clicking the **Edit** button in the **Field Mapping** zone.

3. Modify the required details in the **Main** section.
4. Define, edit, or remove the attribute from the member relationship and subscription tier preference, if required.

Note: You must set at least one attribute in a member relationship and subscription tier preference.

5. Click **Save**.
   The changes made to the member relationship and subscription tier preference are saved.

Related Topics

For more information on...	See...
How to search for a member relationship and subscription tier preference	Searching for a Member Relationship and Subscription Tier Preference on page 157

Copying a Member Relationship and Subscription Tier Preference

Instead of creating a member relationship and subscription tier preference from scratch, you can create a new member relationship and subscription tier preference using an existing member relationship and subscription tier preference. This is possible through copying a member relationship and subscription tier preference. On copying a member relationship and subscription tier preference, the details including the attributes are copied to the new member relationship and subscription tier preference. You can then edit the details, if required.

Prerequisites

To copy a member relationship and subscription tier preference, you should have:

- Member relationship and subscription tier preference (whose copy you want to create) defined in the application
- Required characteristic types defined in the application
- Values defined in the **MAP_ENTITY_FLG** lookup field

Procedure

To copy a member relationship and subscription tier preference:

1. Search for the member relationship and subscription tier preference in the **Field Mapping** screen.

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2. In the **Search Results** section, click the **Duplicate** (⧉) icon in the **Duplicate** column corresponding to the member relationship and subscription tier preference whose copy you want to create.

   The **Field Mapping** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details of the member relationship and subscription tier preference. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Preference	Used to specify the member relationship and subscription tier preference.	Yes
Description	Used to specify the description for the member relationship and subscription tier preference.	Yes
Detailed Description	Used to specify additional information about the member relationship and subscription tier preference.	No
Status	Used to indicate the status of the member relationship and subscription tier preference. The valid values are: • Active • Inactive	Yes
Preference Category	Indicates the category to which the preference belongs. The valid value is: • Member Relationship and Subscription Tier	Not applicable

   - **Preference Settings** - Used to set the attributes in the member relationship and subscription tier preference. It contains the following fields in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Attribute	Used to indicate the attribute which you want to set in the member relationship and subscription tier preference. The valid values are: • **Age Calculation Date Basis Characteristic Type** - Used when the system derives the member relationship for a member person and the subscription tier for a membership. • **Max Age Limit for Max Dependent Count Characteristic Type** - Used when the system derives the member relationship for a member person and the subscription tier for a membership. • **Max Number of Dependents Order Priority Characteristic Type** - Used when the system derives the member relationship for a member person and the subscription tier for a membership. • **Member Relationship Characteristic Type** - Used when the system stores the member relationship for a member person. • **Maximum Number of Dependents Characteristic Type** - Used when the system derives the member relationship for a member person and the subscription tier for a membership. • **Member Relationship Derivation Date Characteristic Type** - Used when the system	Yes (Conditional) **Note:** This field is required while setting an attribute in the member relationship and subscription tier preference.

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<table>
<tr><th>Field Name</th><th>Field Description</th><th>Mandatory (Yes or No)</th></tr>
<tr><td></td><td>derives the member relationship for a member person.
• Member Relationship Structure Characteristic Type - Used when the system derives the member relationship for a member person.
• New Born Gift Days Characteristic Type - Used when the system derives the member relationship for a member person and the subscription tier for a membership.
• New Born Gift Days Applicability Characteristic Type - Used when the system derives the member relationship for a member person and the subscription tier for a membership.</td><td></td></tr>
<tr><td></td><td>• Subscription Tier Structure Characteristic Type - Used when the system derives the subscription tier for a membership.
• Subscription Tier Characteristic Type - Used when the system stores the subscription tier for a membership.
• Young Adult Max Age Limit Characteristic Type - Used when the system derives the member relationship for a member person and the subscription tier for a membership.
• Young Adult Max Age Limit Applicability Characteristic Type - Used when the system derives the member relationship for a member person and the subscription tier for a membership.</td><td></td></tr>
<tr><td>Value</td><td>Used to specify the attribute value. The attribute value that you can specify varies depending on the attribute you want to set in the member relationship and subscription tier preference:
<table><tr><th>If the attribute is set to...</th><th>Then, this field is...</th></tr><tr><td>Age Calculation Date Basis Characteristic Type</td><td>Used to specify the characteristic type that indicates how the member person's age should be calculated. The system supports the following characteristic values:
• Member Enrollment Date
• Member Enrollment Nearest Age
• Plan Start Date
• Policy Renewal/Start Date
This type of characteristic can be defined for the following entities:</td></tr></table></td><td>Yes (Conditional)
Note: This field is required while setting an attribute in the member relationship and subscription tier preference.</td></tr>
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<table>
<tr><th>Field Name</th><th>Field Description</th><th>Mandatory (Yes or No)</th></tr>
<tr><td></td><td>
<table>
<tr><th>If the attribute is set to...</th><th>Then, this field is...</th></tr>
<tr><td></td><td>• Policy Plan
• Policy</td></tr>
</table>
</td><td></td></tr>
<tr><td></td><td>
<table>
<tr><td></td><td>Here, you must specify a characteristic type where the characteristic entity is set to Policy Plan and Policy.

Note: The C1-AGCAL characteristic type is shipped with the product.</td></tr>
<tr><td>Max Age Limit for Max Dependent Count Characteristic Type</td><td>Used to specify the characteristic type that indicates the maximum age limit for children which are eligible for premium calculation. This type of characteristic can be defined for the following entities:
• Policy Plan
• Policy
Here, you must specify a characteristic type where the characteristic entity is set to Policy Plan and Policy.</td></tr>
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• Policy</td></tr>
</table>
</td><td></td></tr>
<tr><td></td><td>
<table>
<tr><td></td><td>Here, you must specify a characteristic type where the characteristic entity is set to Policy Plan and Policy.</td></tr>
</table>
</td><td></td></tr>
</table>

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Field Name	Field Description		Mandatory (Yes or No)
		Note: The **DEPORPRI** characteristic type is shipped with the product.	
	Member Relationship Characteristic Type	Used to specify the characteristic type where you can store the member relationship for a member person. This type of characteristic is defined for the member person. Here, you must specify a characteristic type where the characteristic entity is set to **Membership Person**.	
		Note: The **C1-MEMRL** characteristic type is shipped with the product.	
	Maximum Number of Dependents Characteristic Type	Used to specify the characteristic type that indicates the maximum number of dependent persons which are eligible for premium calculation. This type of characteristic can be defined for the following entities: • Policy Plan • Policy Here, you must specify a characteristic type where the characteristic entity is set to **Policy Plan** and **Policy**.	
	Member Relationship Derivation Date Characteristic Type	Used to specify the characteristic type that indicates whether the member relationship should be derived for a member person using its date of birth or enrollment date. The system supports the following two characteristic values - **Date of Birth** and **Enrollment Date**. This type of characteristic can be defined for the following entities: • Policy Plan	

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Field Name	Field Description		Mandatory (Yes or No)
		• Policy Here, you must specify a characteristic type where the characteristic entity is set to **Policy Plan** and **Policy**. **Note:** The **C1-MRDDB** characteristic type is shipped with the product.	
	Member Relationship Structure Characteristic Type	Used to specify the characteristic type that indicates the member relationship structure which should be considered while deriving the member relationship for a member person. This type of characteristic can be defined for the following entities: • Policy Plan • Policy Here, you must specify a characteristic type where the characteristic entity is set to **Policy Plan** and **Policy**.	
		Note: The **C1-MRLST** characteristic type is shipped with the product.	
	New Born Gift Days Characteristic Type	Used to specify the characteristic type that indicates the number of days you want to offer as gift days from the new born child's birth date. This type of characteristic can be defined for the following entities: • Policy Plan • Policy Here, you must specify a characteristic type where the characteristic entity is set to **Policy Plan** and **Policy**.	

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Field Name	Field Description		Mandatory (Yes or No)
		Note: The **NOOFGIFT** characteristic type is shipped with the product. Here, you must define the required predefined characteristic values.	
	New Born Gift Days Applicability Characteristic Type	Used to specify the characteristic type that indicates whether you want to offer gift days in case of a new born. The system supports the following two characteristic values - **Y** and **N**. This type of characteristic can be defined for the following entities: • Policy Plan • Policy	
		Here, you must specify a characteristic type where the characteristic entity is set to **Policy Plan** and **Policy**.	
		Note: The **NEWBORNA** characteristic type is shipped with the product.	
	Subscription Tier Structure Characteristic Type	Used to specify the characteristic type that indicates the subscription tier structure which should be considered while deriving the subscription tier for a membership. This type of characteristic can be defined for the following entities: • Policy Plan • Policy Here, you must specify a characteristic type where the characteristic entity is set to **Policy Plan** and **Policy**.	
		Note: The **C1-STRST** characteristic type is shipped with the product.	
	Subscription Tier Characteristic Type	Used to specify the characteristic type where you	

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Field Name	Field Description		Mandatory (Yes or No)
		can store the subscription tier for a membership. This type of characteristic is defined for the membership. Here, you must specify a characteristic type where the characteristic entity is set to **Membership**.	
		Note: The **C1-SUBST** characteristic type is shipped with the product.	
	Young Adult Max Age Limit Characteristic Type	Used to specify the characteristic type that indicates the maximum age limit for young adults which are eligible for premium calculation. This type of characteristic can be defined for the following entities: • Policy Plan • Policy Here, you must specify a characteristic type where the characteristic entity is set to **Policy Plan** and **Policy**.	
		Note: The **YADULTAG** characteristic type is shipped with the product. Here, you must define the required predefined characteristic values.	
	Young Adult Max Age Limit Applicability Characteristic Type	Used to specify the characteristic type that indicates whether you want to consider the young adults during the premium calculation. The system supports the following two characteristic values - **Y** and **N**. This type of characteristic can be defined for the following entities: • Policy Plan • Policy	

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Field Name	Field Description	Mandatory (Yes or No)
	Here, you must specify a characteristic type where the characteristic entity is set to **Policy Plan** and **Policy**.	
Entity Type	Used to indicate the type of entity for which the attribute is applicable. The valid values are: • Account • Billable Charge **Note:** At present, this data is stored for informational purposes only and is not considered in the business logic. If required, you can add more entity types to the **MAP_ENTITY_FLG** lookup field.	No

Note: While defining a member relationship and subscription tier preference, you must set at least one attribute in the member relationship and subscription tier preference.

Tip: Alternatively, you can copy a member relationship and subscription tier preference by clicking the **Duplicate** button in the **Field Mapping** zone.

3. Enter the required details in the **Main** section.
4. Define, edit, or remove the attribute from the member relationship and subscription tier preference, if required.
5. Click **Save**.
   The new member relationship and subscription tier preference is defined.

Related Topics

For more information on...	See...
How to search for a member relationship and subscription tier preference	Searching for a Member Relationship and Subscription Tier Preference on page 157

Deleting a Member Relationship and Subscription Tier Preference

Procedure

To delete a member relationship and subscription tier preference:

1. Search for the member relationship and subscription tier preference in the **Field Mapping** screen.
2. In the **Search Results** section, click the **Delete** (🗑) icon in the **Delete** column corresponding to the member relationship and subscription tier preference that you want to delete.
   A message appears confirming whether you want to delete the member relationship and subscription tier preference.

Tip: Alternatively, you can delete a member relationship and subscription tier preference by clicking the **Delete** button in the **Field Mapping** zone.

3. Click **OK**.
   The member relationship and subscription tier preference is deleted.

Related Topics

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For more information on...	See...
How to search for a member relationship and subscription tier preference	Searching for a Member Relationship and Subscription Tier Preference on page 157

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Chapter 5

Fully-Insured Group Policy

Topics:

- Pre-requisites
- Fully-Insured Group Policy Creation
- Fully-Insured Group Policy Status Transition
- Group Membership Status Transition
- Types of Policy Plan
- Types of Group Membership
- Algorithms Used in C1-POLICY
- Algorithms Used in C1-PolicyPlan
- Algorithms Used in C1-Membership
- Late Setup Notification
- To Do Creation for Manual Refund/Write Off on Direct Billed Group Membership Cancellation
- Policy (Used for Searching)
- Policy (Used for Viewing)
- Policy Plan (Used for Viewing)
- Membership (Used for Searching)
- Membership (Used for Viewing)

Group insurance health plans provide coverage to a group of members, usually comprised of company employees or members of an organization. Among all types of group insurance health plans, the fully-insured plan is one of the traditional way to structure an employer-sponsored health plan. It is also commonly known as fully-insured employee health insurance.

In the fully-insured group health plan, the employer contracts an insurance company to cover the employees and their dependents. The employer pays a premium to the insurance carrier. The premium rates are fixed for a year based on the number of employees which are enrolled in the plan. The monthly premium changes during the year when the number of enrolled employees change in the plan. The insurance carrier collects the premium from the employer and pays the health insurance claims to the employees based on the coverage benefits outlined in the policy. The covered persons (i.e. employees and dependents) are responsible to pay any deductible amounts or co-payments required for covered services under the policy.

Oracle Revenue Management and Billing (ORMB) provides specialized methodologies for calculating premium for the employees and their dependents and then bill the total premium to the employer (known as the parent customer in ORMB) or to its logical designed billing entities (known as the bill groups in ORMB). The system enables you to offer different rates for a covered service depending on the following:

- Age of the employee or dependent
- How dependent person is related to the main subscriber
- Membership subscription tier
- Geographic rating area
- Membership or member person attributes

Oracle Revenue Management and Billing (ORMB) enables you to use the pricing methodologies and the billing engine for the fully-insured group health insurance business. To design the pricing and billing models for the fully-insured group health insurance business, you need to create the following entities in ORMB:

- Parent Customer
- Bill Groups
- Bill Group's Account
- Fully-Insured Group Policy
- Policy Plans
- Price Items (for each covered service in the policy)
- Pricing Rule Types
- Pricing Rules

Pre-requisites

To set the billing system for a fully-insured group customer, you need to do the following:

- Define the required policy types in the system.
- Define the required policy person roles in the system.
- Define the values for the **C1-SourceSystemLookup** extendable lookup.
- Define the required characteristic types where the characteristic entity is set to **Policy Type**.
- Define the required characteristic types where the characteristic entity is set to **Policy**.
- Define the status reasons for the **Terminated** status of the **C1-POLICY** business object in the **Status Reason** screen.
- Define the status reasons for the **Reinstated** status of the **C1-POLICY** business object in the **Status Reason** screen.
- Define the required price items in the system.
- Define the required age based, tier based, pass-through billable charge, additional fee, and/or benefit pricing rule types.
- Define the required characteristic types where the characteristic entity is set to **Policy Plan**.
- Define the required contract relationship types in the system.
- Define the required characteristic types where the characteristic entity is set to **Membership**.
- Define the required characteristic types where the characteristic entity is set to **Membership Person**.
- Define the required characteristic types where the characteristic entity is set to **Benefits**.
- Define the required contracts (which you want to associate with a membership) in the system.
- Define the values for the **BILL_TO_TYPE_FLG**, **BENEFIT_TYPE_FLG**, **BENEFIT_SUB_TYPE_FLG**, and **BENEFIT_SRC_FLG** lookup fields
- Define the required parameter values in the following algorithm which is attached to the **C1-POLICY** business object:
  - C1-POLBOVAL
- Define the required parameter values in the following algorithms which are used in the lifecycle of the **C1-POLICY** business object:
  - C1-EVCSTSTAT
  - C1-PLCYTRMRQ
  - C1-POLCYTERM
  - C1-DELTRMLTR
  - C1-PLCYREIRQ
  - C1-POLCYREIN
  - C1-CCPOLRE1
- Define a predefined characteristic type named **Active Employee Coverage Billing Arrangement** with the following characteristic values:

Characteristic Value	**Description**
DRT	Direct Billing
GRP	Group Billing

  You must set the characteristic entity of the **Active Employee Coverage Billing Arrangement** characteristic type to **Person**.
- Define a predefined characteristic type named **Benefit Billing Arrangement** with the following characteristic values:

Characteristic Value	**Description**
DRT	Direct Billing

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Characteristic Value	Description
GRP	Group Billing

You must set the characteristic entity of the **Benefit Billing Arrangement** characteristic type to **Person**, **Policy**, and **Policy Plan**.

- Define a predefined characteristic type named **COBRA Billing Arrangement** with the following characteristic values:

Characteristic Value	Description
DRT	Direct Billing
GRP	Group Billing
TPA	TPA Billing

You must set the characteristic entity of the **COBRA Billing Arrangement** characteristic type to **Person**, **Policy**, and **Policy Plan**.

- Define the required person relationship types and account relationship types in the system.
- Define the required geographic rating areas in the system.
- Define the required member relationship/subscription tier structures in the system.
- Define the required geographic rating area preference and member relationship and subscription tier preference through the **Field Mapping** screen.
- Define the required Medicare plan benefit packages in the system.
- Set the values for the following option types in the **C1-PERSTYPE** feature configuration:
  - Bill Group Person Type
  - Parent Person Type
  - TPA Person Type
- Set the values for the following option types in the **C1-ASOBLLNG** feature configuration:
  - Membership ID Characteristic for Billable Charge
  - Parent Customer Policy Person Role
  - Bill Group Policy Person Role
  - Membership Inactive Status
  - Membership Person Inactive Status
  - Rating Area Field Mapping for Group
  - Relation Structure Code Field Mapping
  - Billing Arrangement
  - Benefit Billing Arrangement
  - Cobra Billing Arrangement
  - TPA Person Relationship Type
  - TPA Account Relationship Type
  - TPA Policy Person Role

Related Topics

For more information on...	See...
How to setup the **C1-ASOBLLNG** feature configuration	Setting the C1-ASOBLLNG Feature Configuration on page 4417
How to setup the **C1-PERSTYPE** feature configuration	Setting the C1_PERSTYPE Feature Configuration on page 4460
How to define a geographic rating area preference	Defining a Geographic Rating Area Preference on page 141

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For more information on...	See...
How to define a member relationship and subscription tier preference	Defining a Member Relationship and Subscription Tier Preference on page 158
How to define a geographic rating area	Defining a Geographic Rating Area on page 61
How to define a member relationship structure	Defining a Member Relationship Structure on page 72
How to define a subscription tier structure	Defining a Subscription Tier Structure on page 85
How to define a Medicare plan benefit package	Defining a Medicare Plan Benefit Package on page 137

Fully-Insured Group Policy Creation

You can create a fully-insured group policy using a policy type where the policy category is set to **Fully-Insured Group** or **Fully-Insured Individual**. The policy type indicates the business object using which the fully-insured group policy should be created in the system.

Note: At present, the **Fully-Insured Individual** policy category is not yet supported in the system.

As per the fully-insured group health insurance business, the system enables you to create a fully-insured group policy for the following:

- A parent customer (where a bill group is not associated)
- A bill group (where the parent customer is the policy holder)

You can create or edit a fully-insured group policy from the **Policy** screen. In addition, you can create or edit a fully-insured group policy through a customer registration object or a health care inbound message. If the fully-insured group policy information is given for a bill group in a health care inbound message, the system does the following:

- Associates the bill group with the policy using the policy person role which is specified in the **Bill Group Policy Person Role** option type of the **C1-ASOBLLNG** feature configuration
- Associates the parent customer with the policy using the policy person role which is specified in the **Parent Customer Policy Person Role** option type of the **C1-ASOBLLNG** feature configuration

However, if the fully-insured group policy information is given for a parent customer in a health care inbound message, the system does the following:

- Associates the parent customer with the policy using the policy person role which is specified in the **Parent Customer Policy Person Role** option type of the **C1-ASOBLLNG** feature configuration

A fully-insured group policy encapsulates the following information:

- **Policy Persons** - While creating a fully-insured group policy, you need to associate the person who is the main customer of the policy. While associating a person with a fully-insured group policy, you need to specify the policy person role which indicates the role of the person in the policy. For example, whether the person associated with the policy is the policy holder, broker, or underwriter. You can associate multiple persons with a fully-insured group policy using the same or different policy person role. However, at a time, only one person can be the main customer of the policy.
- **Policy Plans** - You can define different types of plans in a fully-insured group policy. For more information, refer to Types of Policy Plan on page 214.
- **Memberships** - You can define different types of memberships for a fully-insured group policy plan. For more information, refer to Types of Group Membership on page 215.
- **Member Persons** - While adding a person to a membership, you need to specify whether the person is the main subscriber of the membership, whether the person is financially responsible for the membership, and how the person is related to the main subscriber. At a time, only one person can be the main subscriber of the membership. You cannot remove a member person, who is the main subscriber, from the membership. You can inactivate a member

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person whenever required. If you inactivate a member person who is the main subscriber, the system automatically inactivates the membership and all other member persons which are included in the membership.

- **Membership Contracts** - You can associate one or more contracts with a membership. At present, the system uses the contract created for a policy plan on the accounts of the parent customer or bill group for billing the respective membership premium. The system does not use the membership contracts for billing the membership premium.
- **Policy Plan Contracts** - The system creates or updates contracts of a policy plan when you do either of the following:
  - Create or Edit a Policy Plan from the User Interface or through an Inbound Message
  - Create or Edit an Account from the User Interface or through an Inbound Message

  The system uses the contract created for a policy plan on the accounts of the parent customer or bill group for billing the respective membership premium. For more information, refer to Single Contract Creation Across Fully-Insured Group Policies and Plans on page 191 and Policy Plan Specific Contract Creation on page 201.

On defining a fully-insured group policy, the status of the policy is set to **Pending**. You can then edit, delete or activate a policy. Once a fully-insured group policy is activated, you can terminate, reinstate, or renew the policy whenever required.

Fully-Insured Group Policy Activation

You can activate a fully-insured group policy by clicking the **Activate** button in the **Policy** screen. On activating a fully-insured group policy, the status of the policy is set to **In Force/Active**.

Note: If a fully-insured group policy is created through a customer registration object or a health care inbound message, the status of the policy is directly set to **In Force/Active**

Once a fully-insured group policy is activated, you can terminate, reinstate, or renew the policy whenever required.

Fully-Insured Group Policy Termination

The system enables you to terminate a fully-insured group policy whenever required. There are two ways in which you can terminate a fully-insured group policy:

- **Initiate Policy Termination Process** - In this method, you can initiate the policy termination process from the user interface. To initiate the termination process, you need to specify the termination date and termination reason. On initiating the termination process, the status of the policy is changed to **Pending Termination**. In addition, the system creates an outbound message which request for confirmation whether the policy should be terminated. This outbound message can be sent to the policy processing system via custom mechanism. On receiving confirmation from the policy processing system through a health care inbound message, the system changes the status of the policy to **Terminated**.
- **Terminate Policy** - In this method, you can directly terminate a fully-insured group policy. To terminate a fully-insured group policy, you need to specify the termination reason. You can directly terminate the policy from the user interface or through a health care inbound message. On clicking the **Terminate** button, the system will terminate the fully-insured group policy on the system date. However, when you terminate a fully-insured group policy through a health care inbound message, the policy is terminated when the health care inbound message is processed in the system. On terminating a fully-insured group policy, the status of the policy is changed to **Terminated**.

Once the status of the policy is changed to **Terminated**, the system sets the end date of the following entities to the termination date when the respective condition is met:

- Policy (when the termination date is not earlier than the policy start date or later than the policy end date)
- Policy Person (when the termination date falls within the date range in which the person is associated with the policy)

  Note: The system does not consider those persons associated with policy whose start date is later than the termination date or whose end date is earlier than the termination date.
- Policy Plan (when the termination date falls within the date range of the policy plan)

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> **Note:** The system does not consider those policy plans whose start date is later than the termination date or whose end date is earlier than the termination date.

- Membership (when the termination date falls within the date range of the membership)

> **Note:** The system does not consider those memberships whose start date is later than the termination date or whose end date is earlier than the termination date.

- Member Person (when the termination date falls within the date range in which the person is associated with the membership)

> **Note:** The system does not consider those member persons whose start date is later than the termination date or whose end date is earlier than the termination date.

- Contracts Associated with the Membership (when the termination date falls within the date range of the contract)

> **Note:** The system does not consider those contracts whose start date is later than the termination date or whose end date is earlier than the termination date.

The system also changes the status of all memberships to **Terminated** irrespective of whether it is effective on the termination date or not. On terminating a membership, the system creates an audit event for the membership. For each audit event, the system identifies the policy plan to which the membership belongs and the active pricing rules defined on the policy plan. It then identifies the pricing rule types using which these active pricing rules are created in the system. An entry for each membership, pricing rule type, and effective date combination is created in the **Pending (P)** status in the **CI_REPRC_ENTITY_DTL** table. For more information, see Audit Framework for Fully-Insured Billing on page 3466.

Fully-Insured Group Policy Reinstatement

The system enables you to reinstate the terminated policy whenever required. There are two ways in which you can reinstate a fully-insured group policy:

- **Initiate Policy Reinstatement Process** - In this method, you can initiate the policy reinstatement process from the user interface. To initiate the reinstatement process, you need to specify the reinstatement reason. On initiating the reinstatement process, the status of the policy is changed to **Pending Reinstatement**. In addition, the system creates an outbound message which request for confirmation whether the policy should be reinstated. This outbound message can be sent to the policy processing system via custom mechanism. On receiving confirmation from the policy processing system through a health care inbound message, the system changes the status of the policy to **Reinstated**.
- **Reinstate Policy** - In this method, you can directly reinstate a fully-insured group policy. To reinstate a fully-insured group policy, you need to specify the reinstatement reason. You can directly reinstate the policy from the user interface or through a health care inbound message. On clicking the **Reinstate** button, the system will reinstate the fully-insured group policy on the system date. However, when you reinstate a fully-insured group policy through a health care inbound message, the policy is reinstated when the health care inbound message is processed in the system. On reinstating a fully-insured group policy, the status of the policy is changed to **Reinstated**.

Once the status of the policy is changed to **Reinstated**, the system updates the end date of the following entities to the respective original end date:

- Policy
- Policy Person
- Policy Plan
- Membership
- Member Person
- Contracts Associated with the Membership

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> **Note:**
>
> The system stores the original end date of the above listed entities when you define or edit a policy, policy plan, or membership.
>
> Here, the assumption is that the pass-through billable charges information for the membership will be sent again through an inbound message along with the reinstatement reason. And, therefore the exiting billable charges will not be extended.

Finally, the system automatically transitions the fully-insured group policy from **Reinstated** to **In Force/Active**.

Fully-Insured Group Policy Renewal

You can renew a fully-insured group policy only through a health care inbound message and not from the user interface. If you want to renew a fully-insured group policy, you must sent the renewal date along with the new policy end date through a health care inbound message. On processing the health care inbound message, the fully-insured group policy is renewed. The renewal date is stamped on the fully-insured group policy. The policy end date is extended as mentioned in the health care inbound message. The policy plan and membership information for the renewed period must be sent in the subsequent health care inbound messages.

> **Note:** You can renew a fully-insured group policy when it is in the **In Force/Active** status.

Single Contract Creation Across Fully-Insured Group Policies and Plans

The system automatically creates a contract for a fully-insured group policy plan on the parent customer and/or bill group accounts. The system creates or updates contracts of a policy plan when you do either of the following:

- **Create or Edit a Policy Plan from the User Interface or through an Inbound Message** - The system creates a contract in either of the following ways:
  - If a price item is associated with the policy plan, it creates a contract using the contract type which is associated with the price item.
  - If a pricing rule type is associated with the policy plan and the pricing rule type contains one or more price items, it creates one contract using each contract type which may be associated with one or more price items. Let us assume that a pricing rule type named PRT1 is associated with the policy plan and it contains three price items - PI1, PI2, and PI3. Now, if the PI1 is associated with the CT1 contract type, PI2 is associated with the CT2 contract type, and PI3 is associated with the CT3 contract type, the system will create three contracts - C1 using CT1, C2 using CT2, and C3 using CT3. However, if the PI1 and PI3 are associated with the CT1 contract type and PI2 is associated with the CT2 contract type, the system will create two contracts - C1 using CT1 and C2 using CT2.

    If a policy has two or more plans, multiple pricing rule types are associated with each policy plan and each pricing rule type contains multiple price items, it creates one contract using each contract type which may be associated with one or more price items. Let us assume that P1 has two plans - PP1 and PP2, PRT1 is associated with PP1, PRT2 is associated with PP2, PRT1 contains three price items - PI1, PI2, and PI3, and PRT2 contains three price items - PI1, PI4, and PI5. Now, if the PI1 is associated with the CT1 contract type, PI2 is associated with the CT2 contract type, PI3 is associated with the CT3 contract type, PI4 is associated with the CT4 contract type, and PI5 is associated with the CT5 contract type, the system will create five contracts - C1 using CT1, C2 using CT2, C3 using CT3, C4 using CT4, and C5 using CT5. However, if PI1, PI2, and PI5 are associated with the CT1 contract type and PI3 and PI4 are associated with the CT2 contract type, the system will create two contracts - C1 using CT1 and C2 using CT2.

  The status of each contract is set to **Active**. The contract start date is set to the start date of the respective plan. If the same contract type is associated with different price items, and if these price items are added on different pricing rule types, and if these pricing rule types are associated with different plans, the contract start date is set to the start date of the earliest plan. The default rate schedule specified on the respective contract type is added to the contract in the rate information and its effective date is set to the contract start date.

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Example 1 - Contract Creation for a Parent Customer

If a policy plan belongs to a policy of the parent customer (where a bill group is not associated), the system will create one contract using each contract type on each account of the parent customer and bill groups. Let us assume that…

- PC1 has two bill groups - BG1 and BG2
- PC1 has A1 account, BG1 has A2 account, and BG2 has A3 and A4 accounts
- A policy named P1 with two plans - PP1 and PP2 - is created for PC1 (where none of the bill groups are associated)
- PP1 (with the start date as 01-01-2019) is associated with PRT1 and PRT2
- PP2 (with the start date as 03-01-2019) is associated with PRT2 and PRT3
- PRT1 contains two price items - PI1 and PI2
- PRT2 contains three price items - PI1, PI3, and PI4
- PRT3 contains three price items - PI4, PI5, and PI6
- PI1 is associated with the CT1 contract type, PI2 is associated with the CT2 contract type, PI3 is associated with the CT3 contract type, PI4 and PI5 are associated with the CT4 contract type, and PI6 is associated with the CT6 contract type

The following table indicates the distinct contracts that would be created across policy plans on the A1, A2, A3, and A4 accounts in the above stated scenario:

Account	Plan	Pricing Rule Type	Price Item	Contract Type	Contract	Plans for which the contract is created…	Contract Start Date (i.e. Earliest Plan Date)
A1	PP1	PRTI	PI1	CT1	A1C1	PP1 (01-01-2019) and PP2 (03-01-2019)	01-01-2019
			PI2	CT2	A1C2	PP1 (01-01-2019)	01-01-2019
		PRT2	PI1	CT1	A1C1	PP1 (01-01-2019) and PP2 (03-01-2019)	01-01-2019
			PI3	CT3	A1C3	PP1 (01-01-2019) and PP2 (03-01-2019)	01-01-2019
			PI4	CT4	A1C4	PP1 (01-01-2019) and PP2 (03-01-2019)	01-01-2019
	PP2	PRT2	PI1	CT1	A1C1	PP1 (01-01-2019) and PP2 (03-01-2019)	01-01-2019
			PI3	CT3	A1C3	PP1 (01-01-2019) and PP2 (03-01-2019)	01-01-2019
			PI4	CT4	A1C4	PP1 (01-01-2019) and PP2 (03-01-2019)	01-01-2019
		PRT3	PI4	CT4	A1C4	PP1 (01-01-2019) and PP2 (03-01-2019)	01-01-2019
			PI5	CT4	A1C4	PP2 (03-01-2019)	01-01-2019 (because PI4 and PI5 are associated with the same contract type (i.e. CT4)
			PI6	CT6	A1C6	PP2 (03-01-2019)	03-01-2019
A2	PP1	PRTI	PI1	CT1	A2C1	PP1 (01-01-2019) and PP2 (03-01-2019)	01-01-2019
			PI2	CT2	A2C2	PP1 (01-01-2019)	01-01-2019
		PRT2	PI1	CT1	A2C1	PP1 (01-01-2019) and PP2 (03-01-2019)	01-01-2019
			PI3	CT3	A2C3	PP1 (01-01-2019) and PP2 (03-01-2019)	01-01-2019
			PI4	CT4	A2C4	PP1 (01-01-2019) and PP2 (03-01-2019)	01-01-2019
	PP2	PRT2	PI1	CT1	A2C1	PP1 (01-01-2019) and PP2 (03-01-2019)	01-01-2019
			PI3	CT3	A2C3	PP1 (01-01-2019) and PP2 (03-01-2019)	01-01-2019

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Account	Plan	Pricing Rule Type	Price Item	Contract Type	Contract	Plans for which the contract is created…	Contract Start Date (i.e. Earliest Plan Date)
			PI4	CT4	A2C4	PP1 (01-01-2019) and PP2 (03-01-2019)	01-01-2019
		PRT3	PI4	CT4	A2C4	PP1 (01-01-2019) and PP2 (03-01-2019)	01-01-2019
			PI5	CT4	A2C4	PP2 (03-01-2019)	01-01-2019 (because PI4 and PI5 are associated with the same contract type (i.e. CT4)
			PI6	CT6	A2C6	PP2 (03-01-2019)	03-01-2019
A3	PP1	PRTI	PI1	CT1	A3C1	PP1 (01-01-2019) and PP2 (03-01-2019)	01-01-2019
			PI2	CT2	A3C2	PP1 (01-01-2019)	01-01-2019
		PRT2	PI1	CT1	A3C1	PP1 (01-01-2019) and PP2 (03-01-2019)	01-01-2019
			PI3	CT3	A3C3	PP1 (01-01-2019) and PP2 (03-01-2019)	01-01-2019
			PI4	CT4	A3C4	PP1 (01-01-2019) and PP2 (03-01-2019)	01-01-2019
	PP2	PRT2	PI1	CT1	A3C1	PP1 (01-01-2019) and PP2 (03-01-2019)	01-01-2019
			PI3	CT3	A3C3	PP1 (01-01-2019) and PP2 (03-01-2019)	01-01-2019
			PI4	CT4	A3C4	PP1 (01-01-2019) and PP2 (03-01-2019)	01-01-2019
		PRT3	PI4	CT4	A3C4	PP1 (01-01-2019) and PP2 (03-01-2019)	01-01-2019
			PI5	CT4	A3C4	PP2 (03-01-2019)	01-01-2019 (because PI4 and PI5 are associated with the same contract type (i.e. CT4)
			PI6	CT6	A3C6	PP2 (03-01-2019)	03-01-2019
A4	PP1	PRTI	PI1	CT1	A4C1	PP1 (01-01-2019) and PP2 (03-01-2019)	01-01-2019
			PI2	CT2	A4C2	PP1 (01-01-2019)	01-01-2019
		PRT2	PI1	CT1	A4C1	PP1 (01-01-2019) and PP2 (03-01-2019)	01-01-2019
			PI3	CT3	A4C3	PP1 (01-01-2019) and PP2 (03-01-2019)	01-01-2019
			PI4	CT4	A4C4	PP1 (01-01-2019) and PP2 (03-01-2019)	01-01-2019
	PP2	PRT2	PI1	CT1	A4C1	PP1 (01-01-2019) and PP2 (03-01-2019)	01-01-2019
			PI3	CT3	A4C3	PP1 (01-01-2019) and PP2 (03-01-2019)	01-01-2019
			PI4	CT4	A4C4	PP1 (01-01-2019) and PP2 (03-01-2019)	01-01-2019
		PRT3	PI4	CT4	A4C4	PP1 (01-01-2019) and PP2 (03-01-2019)	01-01-2019
			PI5	CT4	A4C4	PP2 (03-01-2019)	01-01-2019 (because PI4 and PI5 are associated with the same contract type (i.e. CT4)
			PI6	CT6	A4C6	PP2 (03-01-2019)	03-01-2019

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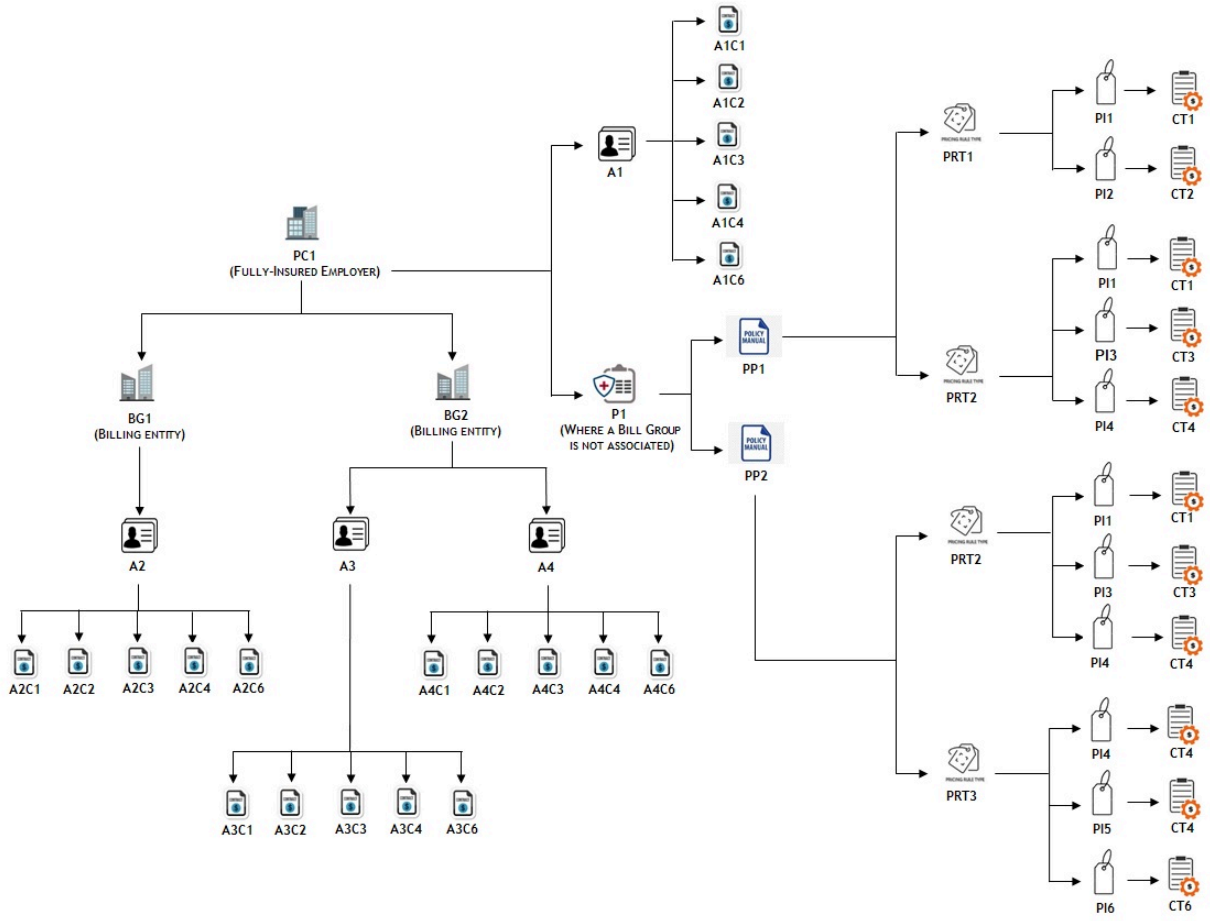
The following figure graphically illustrates the example 1:



Example 2 - Contract Creation for a Bill Group

If a policy plan belongs to a policy of a bill group (where the parent customer is the policy holder), the system will create one contract using each contract type on each account of the parent customer and the bill group. Let us assume that…

- PC1 has two bill groups - BG1 and BG2
- PC1 has A1 account, BG1 has A2 account, and BG2 has A3 and A4 accounts
- A policy named P1 with three plans - PP1, PP2, and PP3 - is created for BG1 (where PC1 is the policy holder)
- PP1 (with the start date as 01-01-2019) is associated with PRT1 and PRT2
- PP2 (with the start date as 03-01-2019) is associated with PRT2 and PRT3
- PP3 (with the start date as 06-01-2019) is associated with PRT1
- PRT1 contains two price items - PI1 and PI2
- PRT2 contains three price items - PI1, PI3, and PI4
- PRT3 contains three price items - PI4, PI5, and PI6
- PI1 is associated with the CT1 contract type, PI2 is associated with the CT2 contract type, PI3 is associated with the CT3 contract type, PI4 and PI5 are associated with the CT4 contract type, and PI6 is associated with the CT6 contract type

The following table indicates the distinct contracts that would be created across policy plans on the A1 and A2 accounts in the above stated scenario:

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Account	Plan	Pricing Rule Type	Price Item	Contract Type	Contract	Plans for which the contract is created…	Contract Start Date (i.e. Earliest Plan Date)
A1	PP1	PRT1	PI1	CT1	A1C1	PP1 (01-01-2019), PP2 (03-01-2019), and PP3 (06-01-2019)	01-01-2019
			PI2	CT2	A1C2	PP1 (01-01-2019) and PP3 (06-01-2019)	01-01-2019
		PRT2	PI1	CT1	A1C1	PP1 (01-01-2019), PP2 (03-01-2019), and PP3 (06-01-2019)	01-01-2019
			PI3	CT3	A1C3	PP1 (01-01-2019) and PP2 (03-01-2019)	01-01-2019
			PI4	CT4	A1C4	PP1 (01-01-2019) and PP2 (03-01-2019)	01-01-2019
	PP2	PRT2	PI1	CT1	A1C1	PP1 (01-01-2019), PP2 (03-01-2019), and PP3 (06-01-2019)	01-01-2019
			PI3	CT3	A1C3	PP1 (01-01-2019) and PP2 (03-01-2019)	01-01-2019
			PI4	CT4	A1C4	PP1 (01-01-2019) and PP2 (03-01-2019)	01-01-2019
		PRT3	PI4	CT4	A1C4	PP1 (01-01-2019) and PP2 (03-01-2019)	01-01-2019
			PI5	CT4	A1C4	PP2 (03-01-2019)	01-01-2019 (because PI4 and PI5 are associated with the same contract type (i.e. CT4)
			PI6	CT6	A1C6	PP2 (03-01-2019)	03-01-2019
	PP3	PRT1	PI1	CT1	A1C1	PP1 (01-01-2019), PP2 (03-01-2019), and PP3 (06-01-2019)	01-01-2019
			PI2	CT2	A1C2	PP1 (01-01-2019) and PP3 (06-01-2019)	01-01-2019
A2	PP1	PRT1	PI1	CT1	A2C1	PP1 (01-01-2019), PP2 (03-01-2019), and PP3 (06-01-2019)	01-01-2019
			PI2	CT2	A2C2	PP1 (01-01-2019) and PP3 (06-01-2019)	01-01-2019
		PRT2	PI1	CT1	A2C1	PP1 (01-01-2019), PP2 (03-01-2019), and PP3 (06-01-2019)	01-01-2019
			PI3	CT3	A2C3	PP1 (01-01-2019) and PP2 (03-01-2019)	01-01-2019
			PI4	CT4	A2C4	PP1 (01-01-2019) and PP2 (03-01-2019)	01-01-2019
	PP2	PRT2	PI1	CT1	A2C1	PP1 (01-01-2019), PP2 (03-01-2019), and PP3 (06-01-2019)	01-01-2019
			PI3	CT3	A2C3	PP1 (01-01-2019) and PP2 (03-01-2019)	01-01-2019
			PI4	CT4	A2C4	PP1 (01-01-2019) and PP2 (03-01-2019)	01-01-2019
		PRT3	PI4	CT4	A2C4	PP1 (01-01-2019) and PP2 (03-01-2019)	01-01-2019
			PI5	CT4	A2C4	PP2 (03-01-2019)	01-01-2019 (because PI4 and PI5 are associated with the same contract type (i.e. CT4)

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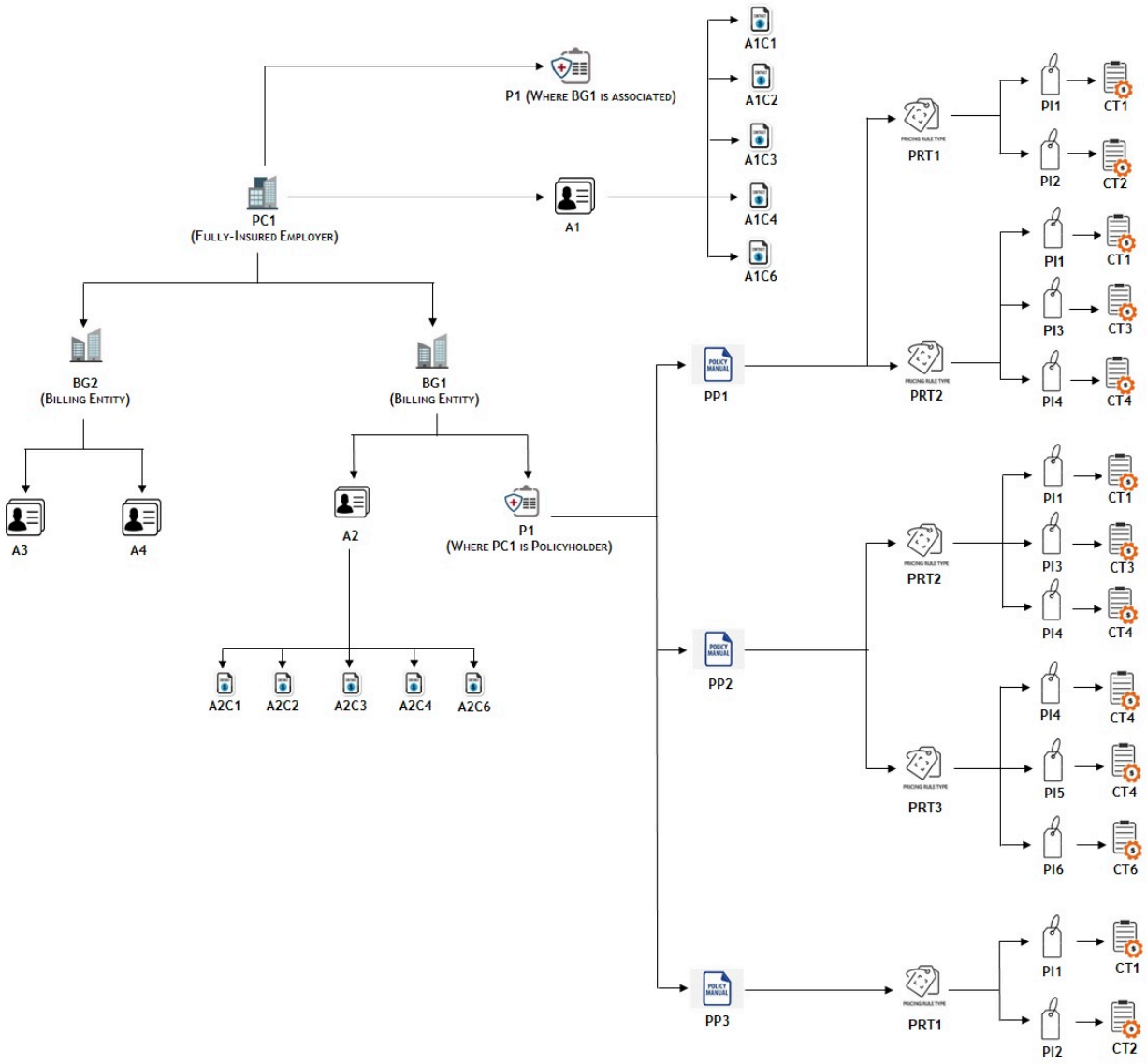
Account	Plan	Pricing Rule Type	Price Item	Contract Type	Contract	Plans for which the contract is created…	Contract Start Date (i.e. Earliest Plan Date)
			PI6	CT6	A2C6	PP2 (03-01-2019)	03-01-2019
	PP3	PRT1	PI1	CT1	A2C1	PP1 (01-01-2019), PP2 (03-01-2019), and PP3 (06-01-2019)	01-01-2019
			PI2	CT2	A2C2	PP1 (01-01-2019) and PP3 (06-01-2019)	01-01-2019

The following figure graphically illustrates the example 2:



Note:

The system creates a contract using a contract type for an account only when the division to which the account and contract type belongs is same.

If a contract of a contract type is already present on the account, the system will not create a new contract. Instead, it will update the start date of the existing contract, if required.

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- **Create or Edit an Account from the User Interface or through an Inbound Message** - The system creates a contract when either of the following condition is met:
  - The main customer of the account is a parent customer and holds a policy (where a bill group is not associated) which is created using the policy type where the policy category is set to **Fully-Insured Group**.
  - The main customer of the account is a parent customer and holds a policy (where a bill group is associated) which is created using the policy type where the policy category is set to **Fully-Insured Group**.
  - The main customer of the account is a bill group and holds a policy (where the parent customer is the policy holder) which is created using the policy type where the policy category is set to **Fully-Insured Group**.

  The system creates a contract in either of the following ways:

  - If a price item is associated with the policy plan, it creates a contract using the contract type which is associated with the price item.
  - If a pricing rule type is associated with the policy plan and the pricing rule type contains one or more price items, it creates one contract using each contract type which may be associated with one or more price items. Let us assume that a pricing rule type named PRT1 is associated with the policy plan and it contains three price items - PI1, PI2, and PI3. Now, if the PI1 is associated with the CT1 contract type, PI2 is associated with the CT2 contract type, and PI3 is associated with the CT3 contract type, the system will create three contracts - C1 using CT1, C2 using CT2, and C3 using CT3. However, if the PI1 and PI3 are associated with the CT1 contract type and PI2 is associated with the CT2 contract type, the system will create two contracts - C1 using CT1 and C2 using CT2.

    If a policy has two or more plans, multiple pricing rule types are associated with each policy plan and each pricing rule type contains multiple price items, it creates one contract using each contract type which may be associated with one or more price items. Let us assume that P1 has two plans - PP1 and PP2, PRT1 is associated with PP1, PRT2 is associated with PP2, PRT1 contains three price items - PI1, PI2, and PI3, and PRT2 contains three price items - PI1, PI4, and PI5. Now, if the PI1 is associated with the CT1 contract type, PI2 is associated with the CT2 contract type, PI3 is associated with the CT3 contract type, PI4 is associated with the CT4 contract type, and PI5 is associated with the CT5 contract type, the system will create five contracts - C1 using CT1, C2 using CT2, C3 using CT3, C4 using CT4, and C5 using CT5. However, if PI1, PI2, and PI5 are associated with the CT1 contract type and PI3 and PI4 are associated with the CT2 contract type, the system will create two contracts - C1 using CT1 and C2 using CT2.

  The status of each contract is set to **Active**. The contract start date is set to the start date of the respective plan. If the same contract type is associated with different price items, and if these price items are added on different pricing rule types, and if these pricing rule types are associated with different plans, the contract start date is set to the start date of the earliest plan. The default rate schedule specified on the respective contract type is added to the contract in the rate information and its effective date is set to the contract start date.

Example 3 - Contract Creation for an Account of a Parent Customer

If you create an account for a parent customer who holds polices (where a bill group may or may not be associated), the system will create one contract using each contract type for all parent customer's policies on the account. Let us assume…

- PC1 has two bill groups - BG1 and BG2
- PC1 has two policies - a policy named P1 (where a bill group is not associated) and a policy named P2 (where BG1 is associated)
- BG1 has one policy named P2 where PC1 is the policy holder
- An account named A1 is added for PC1
- P1 has two plans - PP1 and PP2
- P2 has two plans - PP11 and PP12
- PP1 (with the start date as 01-01-2019) is associated with PRT1 and PRT2
- PP2 (with the start date as 06-01-2019) is associated with PRT2, PRT3, and PRT4
- PP11 (with the start date as 05-01-2019) is associated with PRT111 and PRT112
- PP12 (with the start date as 09-01-2019) is associated with PRT113 and PRT114
- PRT1 contains two price items - PI1 and PI2
- PRT2 contains two price items - PI3 and PI4

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- PRT3 contains two price items - PI1 and PI5
- PRT4 contains two price items - PI6 and PI7
- PRT111 contains two price items - PI11 and PI12
- PRT112 contains two price items - PI1 and PI5
- PRT113 contains two price items - PI13 and PI14
- PRT114 contains two price items - PI7 and PI15
- PI1 is associated with the CT1 contract type, PI2 and PI3 are associated with the CT2 contract type, PI4 is associated with the CT4 contract type, PI5 is associated with the CT5 contract type, PI6 is associated with the CT6 contract type, PI7 is associated with the CT7 contract type, PI11 is associated with the CT11 contract type, PI12 is associated with the CT12 contract type, PI13 is associated with the CT13 contract type, PI14 is associated with the CT14 contract type, and PI15 is associated with the CT15 contract type

The following table indicates the distinct contracts that would be created across policy plans on the A1 account in the above stated scenario:

Account	Policy	Plan	Pricing Rule Type	Price Item	Contract Type	Contract	Plans for which the contract is created…	Contract Start Date (i.e. Earliest Plan Date)
A1	P1	PP1	PRT1	PI1	CT1	A1C1	PP1 (01-01-2019), PP2 (06-01-2019), and PP11 (05-01-2019)	01-01-2019
				PI2	CT2	A1C2	PP1 (01-01-2019)	01-01-2019
			PRT2	PI3	CT2	A1C2	PP1 (01-01-2019) and PP2 (06-01-2019)	01-01-2019
				PI4	CT4	A1C4	PP1 (01-01-2019) and PP2 (06-01-2019)	01-01-2019
		PP2	PRT2	PI3	CT2	A1C2	PP1 (01-01-2019) and PP2 (06-01-2019)	01-01-2019
				PI4	CT4	A1C4	PP1 (01-01-2019) and PP2 (06-01-2019)	01-01-2019
			PRT3	PI1	CT1	A1C1	PP1 (01-01-2019), PP2 (06-01-2019), and PP11 (05-01-2019)	01-01-2019
				PI5	CT5	A1C5	PP2 (06-01-2019) and PP11 (05-01-2019)	05-01-2019
			PRT4	PI6	CT6	A1C6	PP2 (06-01-2019)	06-01-2019
				PI7	CT7	A1C7	PP2 (06-01-2019) and PP12 (09-01-2019)	06-01-2019
	P2	PP11	PRT111	PI11	CT11	A1C11	PP11 (05-01-2019)	05-01-2019
				PI12	CT12	A1C12	PP11 (05-01-2019)	05-01-2019
			PRT112	PI1	CT1	A1C1	PP1 (01-01-2019), PP2 (06-01-2019), and PP11 (05-01-2019)	01-01-2019
				PI5	CT5	A1C5	PP2 (06-01-2019) and PP11 (05-01-2019)	05-01-2019
		PP12	PRT113	PI13	CT13	A1C13	PP12 (09-01-2019)	09-01-2019
				PI14	CT14	A1C14	PP12 (09-01-2019)	09-01-2019
			PRT114	PI7	CT7	A1C7	PP2 (06-01-2019) and PP12 (09-01-2019)	06-01-2019

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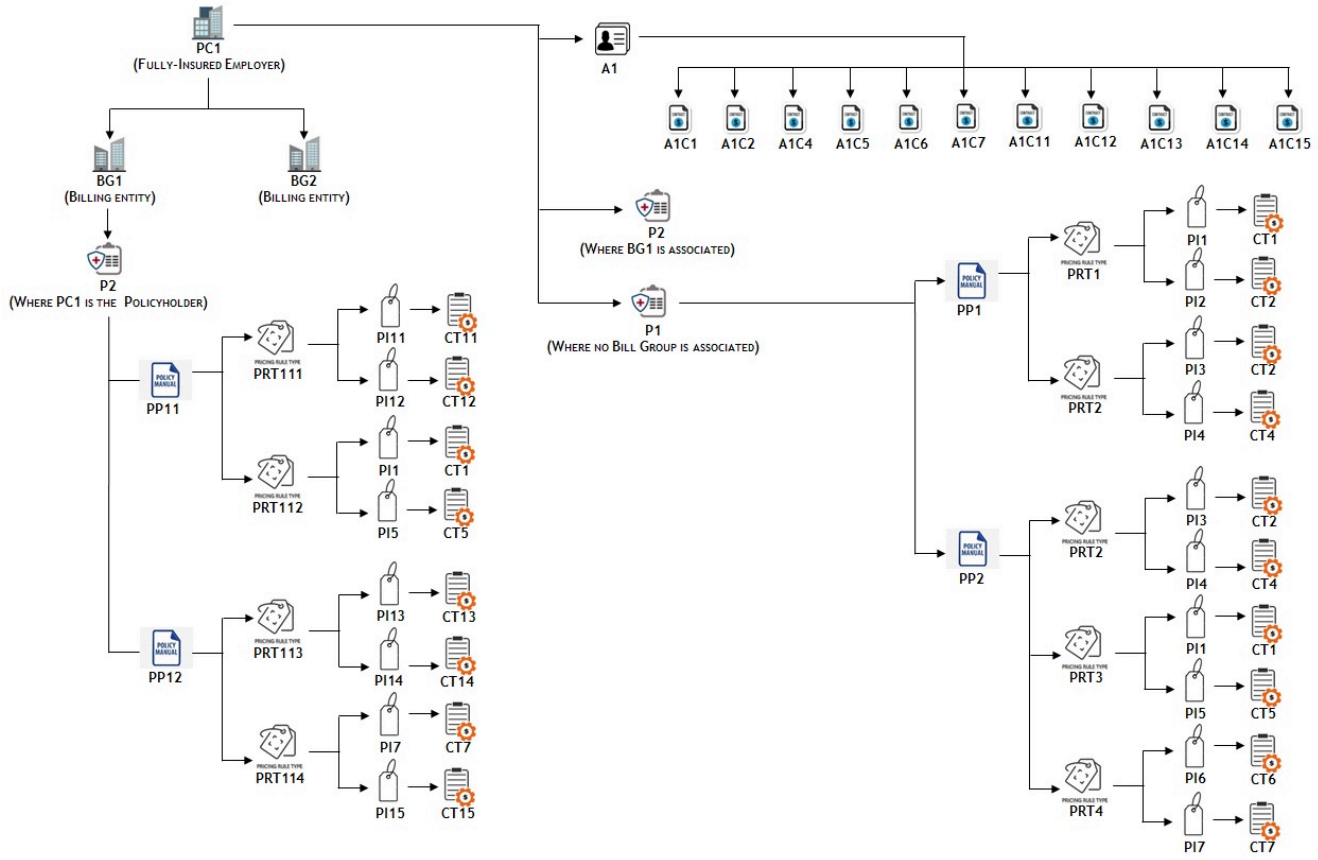
Account	Policy	Plan	Pricing Rule Type	Price Item	Contract Type	Contract	Plans for which the contract is created…	Contract Start Date (i.e. Earliest Plan Date)
				PI15	CT15	A1C15	PP12 (09-01-2019)	09-01-2019

The following figure graphically illustrates the example 3:



Example 4 - Contract Creation for an Account of a Bill Group

If you create an account for a bill group who holds policies and its parent customer holds policies (where a bill group may or may not be associated), the system will create one contract using each contract type for the bill group's polices and parent customer's polices (where a bill group is not associated) on the account. Let us assume…

- PC1 has two bill groups - BG1 and BG2
- PC1 has two policies - a policy named P2 (where a bill group is not associated) and a policy named P1 (where BG2 is associated)
- BG2 has one policy named P1 where PC1 is the policy holder
- An account named A1 is added for BG2
- P1 has two plans - PP11 and PP12
- P2 has two plans - PP1 and PP2
- PP1 (with the start date as 01-01-2019) is associated with PRT1 and PRT2
- PP2 (with the start date as 04-01-2019) is associated with PRT3 and PRT4
- PP11 (with the start date as 07-01-2019) is associated with PRT11 and PRT12
- PP12 (with the start date as 11-01-2019) is associated with PRT13 and PRT14
- PRT1 contains two price items - PI1 and PI2
- PRT2 contains two price items - PI3 and PI2
- PRT3 contains two price items - PI3 and PI4
- PRT4 contains two price items - PI5 and PI6

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- PRT11 contains two price items - PI111 and PI112
- PRT12 contains two price items - PI1 and PI6
- PRT13 contains two price items - PI113 and PI114
- PRT14 contains two price items - PI115 and PI5
- PI1 is associated with the CT1 contract type, PI2 and PI3 are associated with the CT2 contract type, PI4 is associated with the CT4 contract type, PI5 is associated with the CT5 contract type, PI6 is associated with the CT6 contract type, PI111 is associated with the CT111 contract type, PI112 is associated with the CT112 contract type, PI113 is associated with the CT113 contract type, and PI114 and PI115 is associated with the CT114 contract type

The following table indicates the distinct contracts that would be created across policy plans on the A1 account in the above stated scenario:

Account	Policy	Plan	Pricing Rule Type	Price Item	Contract Type	Contract	Plans for which the contract is created…	Contract Start Date (i.e. Earliest Plan Date)
A1	P1	PP11	PRT11	PI111	CT111	A1C111	PP11 (07-01-2019)	07-01-2019
				PI112	CT112	A1C112	PP11 (07-01-2019)	07-01-2019
			PRT12	PI1	CT1	A1C1	PP1 (01-01-2019) and PP11 (07-01-2019)	01-01-2019
				PI6	CT6	A1C6	PP2 (04-01-2019) and PP11 (07-01-2019)	04-01-2019
		PP12	PRT13	PI113	CT113	A1C113	PP12 (11-01-2019)	11-01-2019
				PI114	CT114	A1C114	PP12 (11-01-2019)	11-01-2019
			PRT14	PI115	CT114	A1C114	PP12 (11-01-2019)	11-01-2019
				PI5	CT5	A1C5	PP2 (04-01-2019) and PP12 (11-01-2019)	04-01-2019
	P2	PP1	PRT1	PI1	CT1	A1C1	PP1 (01-01-2019) and PP11 (07-01-2019)	01-01-2019
				PI2	CT2	A1C2	PP1 (01-01-2019)	01-01-2019
			PRT2	PI2	CT2	A1C2	PP1 (01-01-2019)	01-01-2019
				PI3	CT2	A1C2	PP1 (01-01-2019) and PP2 (04-01-2019)	01-01-2019
		PP2	PRT3	PI3	CT2	A1C2	PP1 (01-01-2019) and PP2 (04-01-2019)	01-01-2019
				PI4	CT4	A1C4	PP2 (04-01-2019)	04-01-2019
			PRT4	PI5	CT5	A1C5	PP2 (04-01-2019) and PP12 (11-01-2019)	04-01-2019
				PI6	CT6	A1C6	PP2 (04-01-2019) and PP11 (07-01-2019)	04-01-2019

The following figure graphically illustrates the example 4:

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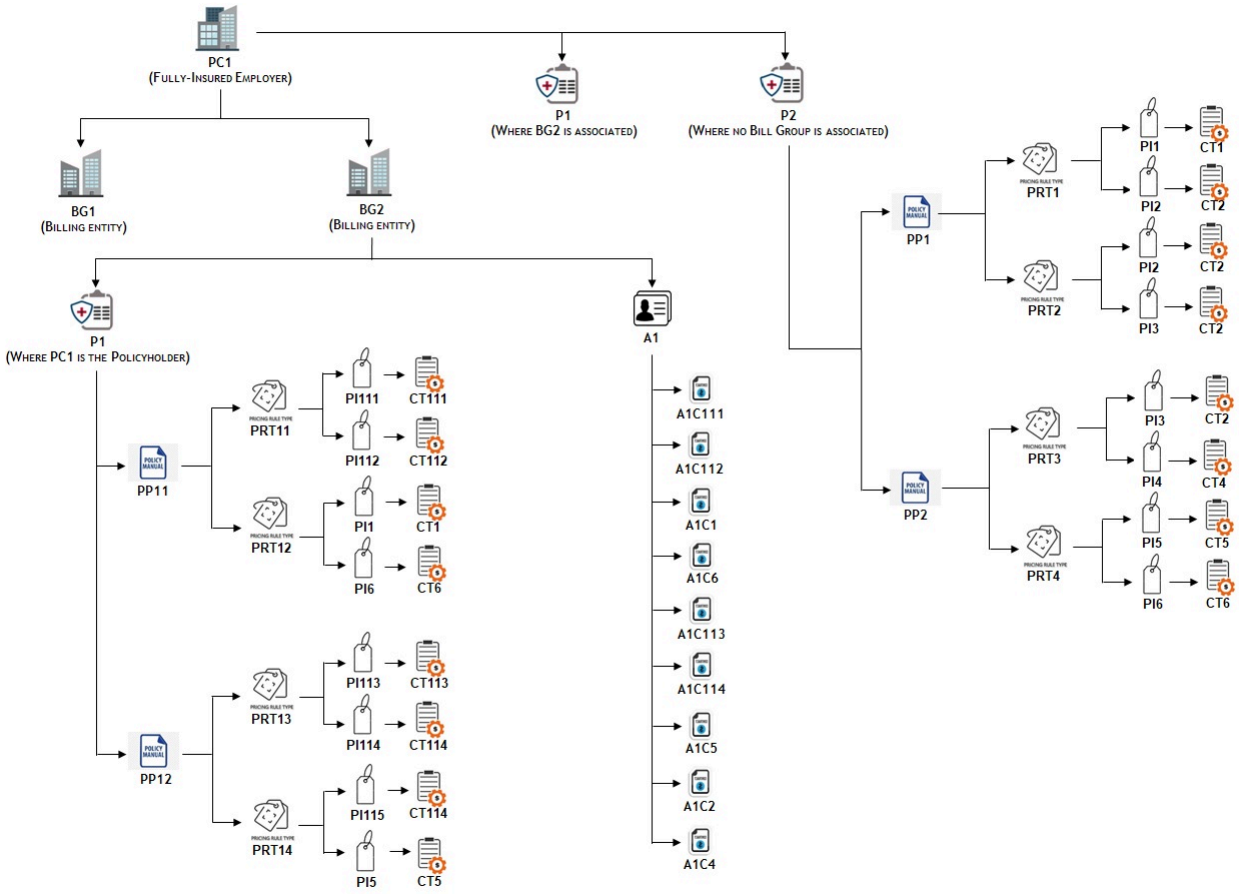

Note:

The system creates a contract using a contract type for an account only when the division to which the account and contract type belongs is same.

If a contract of a contract type is already present on the account, the system will not create a new contract. Instead, it will update the start date of the existing contract, if required.

Policy Plan Specific Contract Creation

In the Single Contract Creation Across Fully-Insured Group Policies and Plans on page 191 section, we have seen how the system creates one contract across fully-insured group policies and plans on the parent customer and/or bill group accounts. Alternatively, the system enables you to create a plan-specific contract (i.e. a contract using a contract type for each plan) on the parent customer and/or bill group accounts. You can opt for the plan-specific contract creation feature when you want to implement plan-specific business rules. For example, different payment priorities for your medical and dental plans. Under such conditions, you can create different contract types for different plans, say Medical and Dental and enable creation of different contracts using these contract types for billing different plans.

You can configure the plan-specific contract creation feature for the fully-insured group health insurance business by setting the following option types in the **C1-ASOBLLNG** feature configuration:

- **Plan ID Characteristic Type** - Used to specify the characteristic type where you want to store the plan for which the contract is created. During the plan-specific contract creation, this characteristic is defined on the contract. Here, you must specify a characteristic type where the characteristic entity is set to **Contract**.

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- **Plan Based Contract Creation Eligibility** - Used to indicate whether the system should create plan-specific contract on the account. The valid value is **Yes**.

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

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

Here, the system creates or updates contracts of a policy plan when you do either of the following:

- **Create or Edit a Policy Plan from the User Interface or through an Inbound Message** - The system creates a contract in either of the following ways:
  - If a price item is associated with the policy plan, it creates a contract using the contract type which is associated with the price item.
  - If a pricing rule type is associated with the policy plan and the pricing rule type contains one or more price items, it creates one plan-specific contract using each contract type which may be associated with one or more price items. Let us assume that a pricing rule type named PRT1 is associated with the policy plan and it contains three price items - PI1, PI2, and PI3. Now, if the PI1 is associated with the CT1 contract type, PI2 is associated with the CT2 contract type, and PI3 is associated with the CT3 contract type, the system will create three contracts - C1 using CT1, C2 using CT2, and C3 using CT3. However, if the PI1 and PI3 are associated with the CT1 contract type and PI2 is associated with the CT2 contract type, the system will create two contracts - C1 using CT1 and C2 using CT2.

    If a policy has two or more plans, multiple pricing rule types are associated with each policy plan and each pricing rule type contains multiple price items, it creates one plan-specific contract using each contract type which may be associated with one or more price items. Let us assume that P1 has two plans - PP1 and PP2, PRT1 is associated with PP1, PRT2 is associated with PP2, PRT1 contains three price items - PI1, PI2, and PI3, and PRT2 contains three price items - PI1, PI4, and PI5. Now, if the PI1 is associated with the CT1 contract type, PI2 is associated with the CT2 contract type, PI3 is associated with the CT3 contract type, PI4 is associated with the CT4 contract type, and PI5 is associated with the CT5 contract type, the system will create six contracts - C1PP1 using CT1 for PP1, C1PP2 using CT1 for PP2, C2PP1 using CT2 for PP1, C3PP1 using CT3 for PP1, C4PP2 using CT4 for PP2, and C5PP2 using CT5 for PP2. However, if PI1, PI2, and PI5 are associated with the CT1 contract type and PI3 and PI4 are associated with the CT2 contract type, the system will create four contracts - C1PP1 using CT1 for PP1, C1PP2 using CT1 for PP2, C2PP1 using CT2 for PP1, and C2PP2 using CT2 for PP2.

  The status of each contract is set to **Active**. The contract start date is set to the start date of the respective plan. The default rate schedule specified on the respective contract type is added to the contract in the rate information and its effective date is set to the contract start date. The characteristic type, which is specified in the **Plan ID Characteristic Type** option type of the **C1-ASOBLLNG** feature configuration, is defined for each contract. It stores the plan ID which indicates the plan for which the contract is created.

  Example 1 - Plan-Specific Contract Creation for a Parent Customer

  If a policy plan belongs to a policy of the parent customer (where a bill group is not associated), the system will create one plan-specific contract using each contract type on each account of the parent customer and bill groups. Let us assume that…

  - PC1 has two bill groups - BG1 and BG2
  - PC1 has A1 account, BG1 has A2 account, and BG2 has A3 and A4 accounts
  - A policy named P1 with two plans - PP1 and PP2 - is created for PC1 (where none of the bill groups are associated)

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- PP1 (with the start date as 01-01-2019) is associated with PRT1 and PRT2
- PP2 (with the start date as 03-01-2019) is associated with PRT2 and PRT3
- PRT1 contains two price items - PI1 and PI2
- PRT2 contains three price items - PI1, PI3, and PI4
- PRT3 contains three price items - PI4, PI5, and PI6
- PI1 is associated with the CT1 contract type, PI2 is associated with the CT2 contract type, PI3 is associated with the CT3 contract type, PI4 and PI5 are associated with the CT4 contract type, and PI6 is associated with the CT6 contract type

The following table indicates the distinct plan-specific contracts that would be created on the A1, A2, A3, and A4 accounts in the above stated scenario:

Account	**Plan**	**Pricing Rule Type**	**Price Item**	**Contract Type**	**Contract**	**Contract Start Date**
A1	PP1	PRTI	PI1	CT1	A1C1PP1	01-01-2019
			PI2	CT2	A1C2PP1	01-01-2019
		PRT2	PI1	CT1	A1C1PP1	01-01-2019
			PI3	CT3	A1C3PP1	01-01-2019
			PI4	CT4	A1C4PP1	01-01-2019
	PP2	PRT2	PI1	CT1	A1C1PP2	03-01-2019
			PI3	CT3	A1C3PP2	03-01-2019
			PI4	CT4	A1C4PP2	03-01-2019
		PRT3	PI4	CT4	A1C4PP2	03-01-2019
			PI5	CT4	A1C4PP2	03-01-2019
			PI6	CT6	A1C6PP2	03-01-2019
A2	PP1	PRTI	PI1	CT1	A2C1PP1	01-01-2019
			PI2	CT2	A2C2PP1	01-01-2019
		PRT2	PI1	CT1	A2C1PP1	01-01-2019
			PI3	CT3	A2C3PP1	01-01-2019
			PI4	CT4	A2C4PP1	01-01-2019
	PP2	PRT2	PI1	CT1	A2C1PP2	03-01-2019
			PI3	CT3	A2C3PP2	03-01-2019
			PI4	CT4	A2C4PP2	03-01-2019
		PRT3	PI4	CT4	A2C4PP2	03-01-2019
			PI5	CT4	A2C4PP2	03-01-2019
			PI6	CT6	A2C6PP2	03-01-2019
A3	PP1	PRTI	PI1	CT1	A3C1PP1	01-01-2019
			PI2	CT2	A3C2PP1	01-01-2019
		PRT2	PI1	CT1	A3C1PP1	01-01-2019
			PI3	CT3	A3C3PP1	01-01-2019

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Account	Plan	Pricing Rule Type	Price Item	Contract Type	Contract	Contract Start Date
			PI4	CT4	A3C4PP1	01-01-2019
	PP2	PRT2	PI1	CT1	A3C1PP2	03-01-2019
			PI3	CT3	A3C3PP2	03-01-2019
			PI4	CT4	A3C4PP2	03-01-2019
		PRT3	PI4	CT4	A3C4PP2	03-01-2019
			PI5	CT4	A3C4PP2	03-01-2019
			PI6	CT6	A3C6PP2	03-01-2019
A4	PP1	PRTI	PI1	CT1	A4C1PP1	01-01-2019
			PI2	CT2	A4C2PP1	01-01-2019
		PRT2	PI1	CT1	A4C1PP1	01-01-2019
			PI3	CT3	A4C3PP1	01-01-2019
			PI4	CT4	A4C4PP1	01-01-2019
	PP2	PRT2	PI1	CT1	A4C1PP2	03-01-2019
			PI3	CT3	A4C3PP2	03-01-2019
			PI4	CT4	A4C4PP2	03-01-2019
		PRT3	PI4	CT4	A4C4PP2	03-01-2019
			PI5	CT4	A4C4PP2	03-01-2019
			PI6	CT6	A4C6PP2	03-01-2019

The following figure graphically illustrates the example 1:

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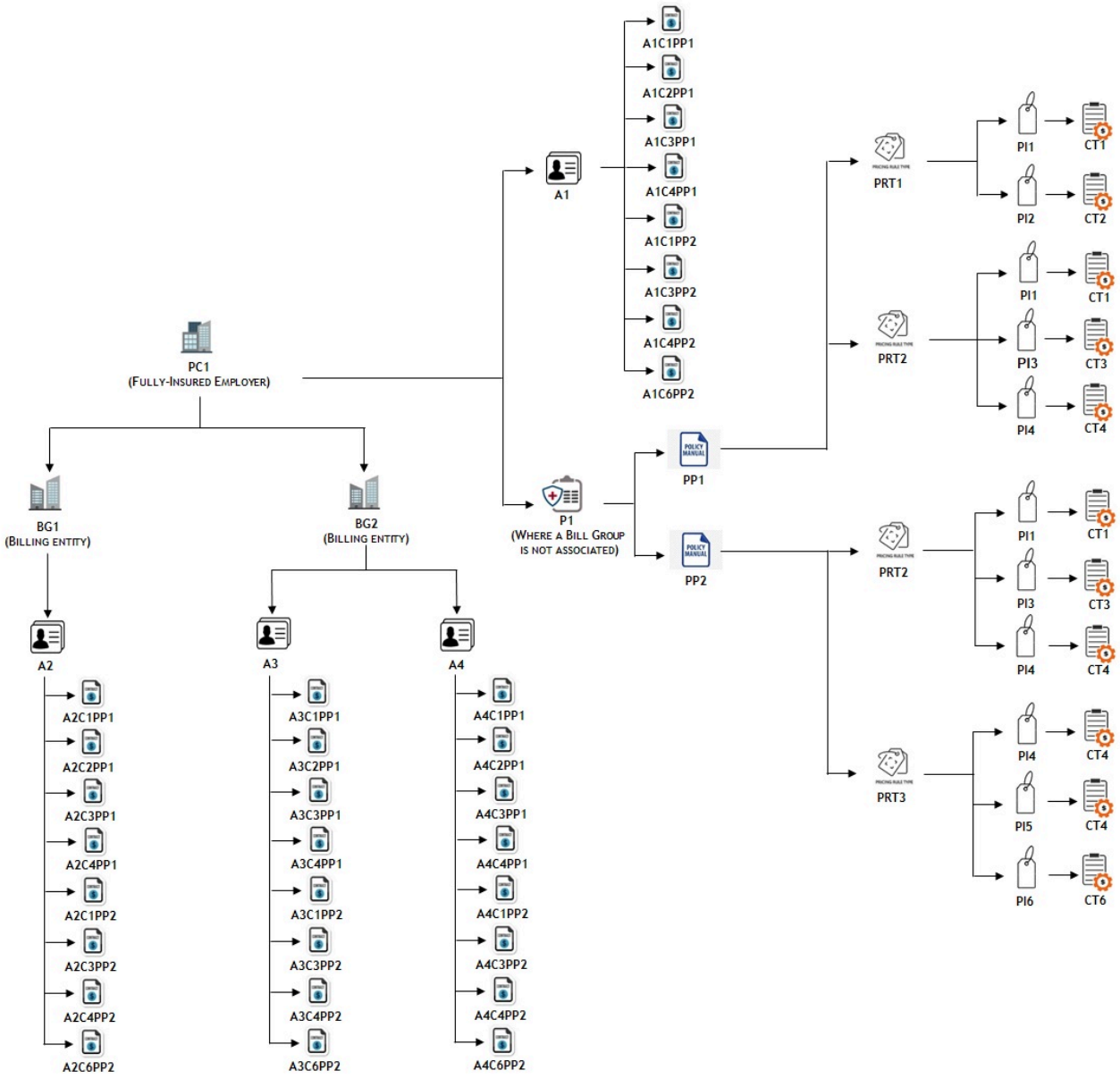

Example 2 - Plan-Specific Contract Creation for a Bill Group

If the policy plan belongs to a policy of a bill group (where the parent customer is the policy holder), the system will create one plan-specific contract using each contract type on each account of the parent customer and the bill group. Let us assume that…

- PC1 has two bill groups - BG1 and BG2
- PC1 has A1 account, BG1 has A2 account, and BG2 has A3 and A4 accounts
- A policy named P1 with three plans - PP1, PP2, and PP3 - is created for BG1 (where PC1 is the policy holder)
- PP1 (with the start date as 01-01-2019) is associated with PRT1 and PRT2
- PP2 (with the start date as 03-01-2019) is associated with PRT2 and PRT3
- PP3 (with the start date as 06-01-2019) is associated with PRT1
- PRT1 contains two price items - PI1 and PI2
- PRT2 contains three price items - PI1, PI3, and PI4
- PRT3 contains three price items - PI4, PI5, and PI6

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- PI1 is associated with the CT1 contract type, PI2 is associated with the CT2 contract type, PI3 is associated with the CT3 contract type, PI4 and PI5 are associated with the CT4 contract type, and PI6 is associated with the CT6 contract type

The following table indicates the distinct plan-specific contracts that would be created on the A1 and A2 accounts in the above stated scenario:

Account	Plan	Pricing Rule Type	Price Item	Contract Type	Contract	Contract Start Date
A1	PP1	PRT1	PI1	CT1	A1C1PP1	01-01-2019
			PI2	CT2	A1C2PP1	01-01-2019
		PRT2	PI1	CT1	A1C1PP1	01-01-2019
			PI3	CT3	A1C3PP1	01-01-2019
			PI4	CT4	A1C4PP1	01-01-2019
	PP2	PRT2	PI1	CT1	A1C1PP2	03-01-2019
			PI3	CT3	A1C3PP2	03-01-2019
			PI4	CT4	A1C4PP2	03-01-2019
		PRT3	PI4	CT4	A1C4PP2	03-01-2019
			PI5	CT4	A1C4PP2	03-01-2019
			PI6	CT6	A1C6PP2	03-01-2019
	PP3	PRT1	PI1	CT1	A1C1PP3	06-01-2019
			PI2	CT2	A1C2PP3	06-01-2019
A2	PP1	PRT1	PI1	CT1	A2C1PP1	01-01-2019
			PI2	CT2	A2C2PP1	01-01-2019
		PRT2	PI1	CT1	A2C1PP1	01-01-2019
			PI3	CT3	A2C3PP1	01-01-2019
			PI4	CT4	A2C4PP1	01-01-2019
	PP2	PRT2	PI1	CT1	A2C1PP2	03-01-2019
			PI3	CT3	A2C3PP2	03-01-2019
			PI4	CT4	A2C4PP2	03-01-2019
		PRT3	PI4	CT4	A2C4PP2	03-01-2019
			PI5	CT4	A2C4PP2	03-01-2019
			PI6	CT6	A2C6PP2	03-01-2019
	PP3	PRT1	PI1	CT1	A2C1PP3	06-01-2019
			PI2	CT2	A2C2PP3	06-01-2019

The following figure graphically illustrates the example 2:

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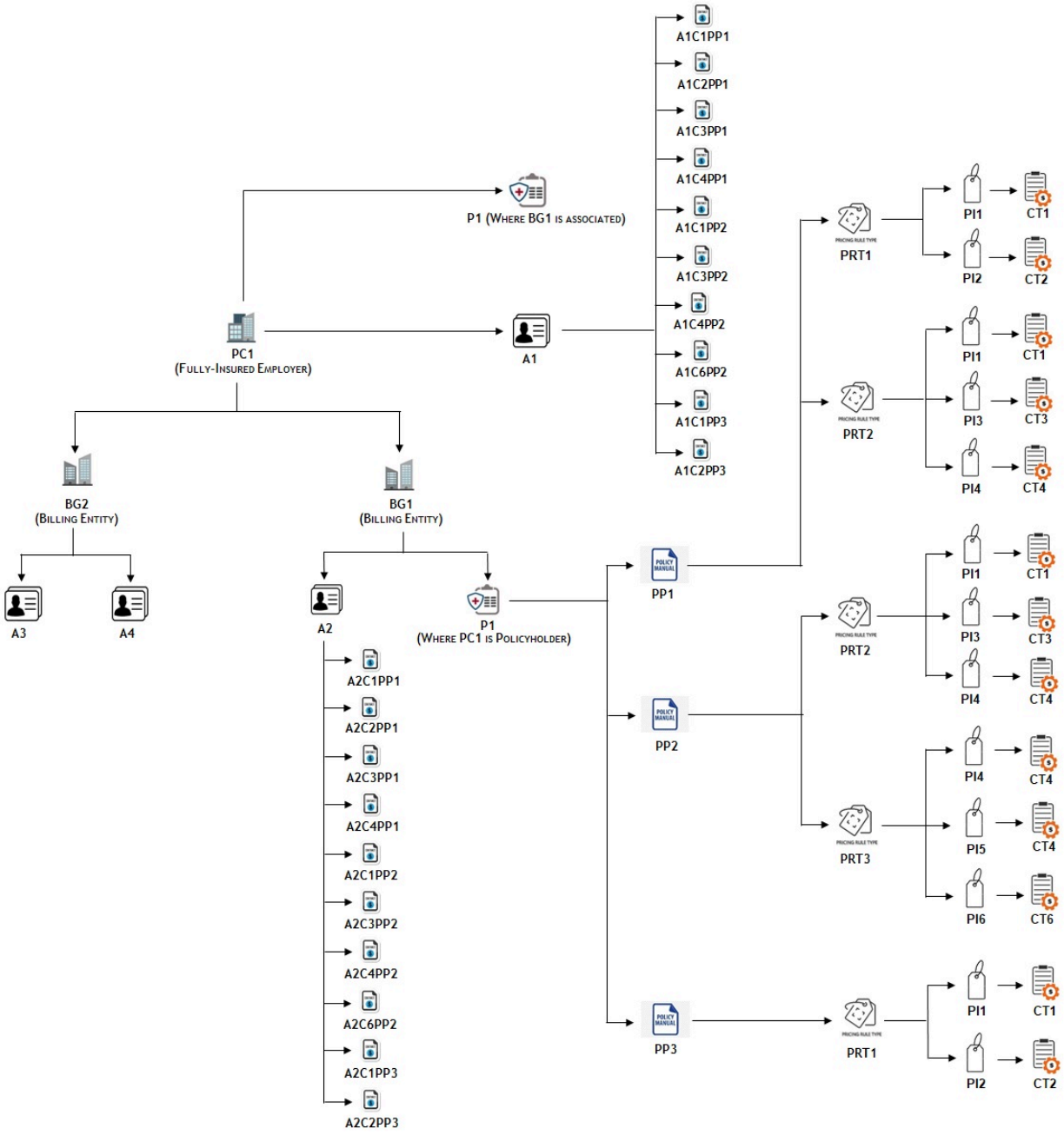

Note: The system creates a contract using a contract type for an account when the division to which the account and contract type belongs is same.

- **Create or Edit an Account from the User Interface or through an Inbound Message** - The system creates a contract when either of the following condition is met:
  - The main customer of the account is a parent customer and holds a policy (where a bill group is not associated) which is created using the policy type where the policy category is set to **Fully-Insured Group**.
  - The main customer of the account is a parent customer and holds a policy (where a bill group is associated) which is created using the policy type where the policy category is set to **Fully-Insured Group**.
  - The main customer of the account is a bill group and holds a policy (where the parent customer is the policy holder) which is created using the policy type where the policy category is set to **Fully-Insured Group**.

  The system creates a contract in either of the following ways:

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- If a price item is associated with the policy plan, it creates a contract using the contract type which is associated with the price item.
- If a pricing rule type is associated with the policy plan and the pricing rule type contains one or more price items, it creates one plan-specific contract using each contract type which may be associated with one or more price items. Let us assume that a pricing rule type named PRT1 is associated with the policy plan and it contains three price items - PI1, PI2, and PI3. Now, if the PI1 is associated with the CT1 contract type, PI2 is associated with the CT2 contract type, and PI3 is associated with the CT3 contract type, the system will create three contracts - C1 using CT1, C2 using CT2, and C3 using CT3. However, if the PI1 and PI3 are associated with the CT1 contract type and PI2 is associated with the CT2 contract type, the system will create two contracts - C1 using CT1 and C2 using CT2.

  If a policy has two or more plans, multiple pricing rule types are associated with each policy plan and each pricing rule type contains multiple price items, it creates one plan-specific contract using each contract type which may be associated with one or more price items. Let us assume that P1 has two plans - PP1 and PP2, PRT1 is associated with PP1, PRT2 is associated with PP2, PRT1 contains three price items - PI1, PI2, and PI3, and PRT2 contains three price items - PI1, PI4, and PI5. Now, if the PI1 is associated with the CT1 contract type, PI2 is associated with the CT2 contract type, PI3 is associated with the CT3 contract type, PI4 is associated with the CT4 contract type, and PI5 is associated with the CT5 contract type, the system will create six contracts - C1PP1 using CT1 for PP1, C1PP2 using CT1 for PP2, C2PP1 using CT2 for PP1, C3PP1 using CT3 for PP1, C4PP2 using CT4 for PP2, and C5PP2 using CT5 for PP2. However, if PI1, PI2, and PI5 are associated with the CT1 contract type and PI3 and PI4 are associated with the CT2 contract type, the system will create four contracts - C1PP1 using CT1 for PP1, C1PP2 using CT1 for PP2, C2PP1 using CT2 for PP1, and C2PP2 using CT2 for PP2.

The status of each contract is set to **Active**. The contract start date is set to the start date of the respective plan. The default rate schedule specified on the respective contract type is added to the contract in the rate information and its effective date is set to the contract start date. The characteristic type, which is specified in the **Plan ID Characteristic Type** option type of the **C1-ASOBLLNG** feature configuration, is defined for each contract. It stores the plan ID which indicates the plan for which the contract is created.

Example 3 - Plan-Specific Contract Creation for an Account of a Parent Customer

If you create an account for a parent customer who holds polices (where a bill group may or may not be associated), the system will create one plan-specific contract using each contract type for all parent customer's policies on the account. Let us assume…

- PC1 has two bill groups - BG1 and BG2
- PC1 has two policies - a policy named P1 (where a bill group is not associated) and a policy named P2 (where BG1 is associated)
- BG1 has one policy named P2 where PC1 is the policy holder
- An account named A1 is added for PC1
- P1 has two plans - PP1 and PP2
- P2 has two plans - PP11 and PP12
- PP1 (with the start date as 01-01-2019) is associated with PRT1 and PRT2
- PP2 (with the start date as 06-01-2019) is associated with PRT2, PRT3, and PRT4
- PP11 (with the start date as 05-01-2019) is associated with PRT111 and PRT112
- PP12 (with the start date as 09-01-2019) is associated with PRT113 and PRT114
- PRT1 contains two price items - PI1 and PI2
- PRT2 contains two price items - PI3 and PI4
- PRT3 contains two price items - PI1 and PI5
- PRT4 contains two price items - PI6 and PI7
- PRT111 contains two price items - PI11 and PI12
- PRT112 contains two price items - PI1 and PI5
- PRT113 contains two price items - PI13 and PI14
- PRT114 contains two price items - PI7 and PI15
- PI1 is associated with the CT1 contract type, PI2 and PI3 are associated with the CT2 contract type, PI4 is associated with the CT4 contract type, PI5 is associated with the CT5 contract type, PI6 is associated with the

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CT6 contract type, PI7 is associated with the CT7 contract type, PI11 is associated with the CT11 contract type, PI12 is associated with the CT12 contract type, PI13 is associated with the CT13 contract type, PI14 is associated with the CT14 contract type, and PI15 is associated with the CT15 contract type

The following table indicates the distinct plan-specific contracts that would be created on the A1 account in the above stated scenario:

Account	Policy	Plan	Pricing Rule Type	Price Item	Contract Type	Contract	Contract Start Date
A1	P1	PP1	PRT1	PI1	CT1	A1C1PP1	01-01-2019
				PI2	CT2	A1C2PP1	01-01-2019
			PRT2	PI3	CT2	A1C2PP1	01-01-2019
				PI4	CT4	A1C4PP1	01-01-2019
		PP2	PRT2	PI3	CT2	A1C2PP2	06-01-2019
				PI4	CT4	A1C4PP2	06-01-2019
			PRT3	PI1	CT1	A1C1PP2	06-01-2019
				PI5	CT5	A1C5PP2	06-01-2019
			PRT4	PI6	CT6	A1C6PP2	06-01-2019
				PI7	CT7	A1C7PP2	06-01-2019
	P2	PP11	PRT111	PI11	CT11	A1C11PP11	05-01-2019
				PI12	CT12	A1C12PP11	05-01-2019
			PRT112	PI1	CT1	A1C1PP11	05-01-2019
				PI5	CT5	A1C5PP11	05-01-2019
		PP12	PRT113	PI13	CT13	A1C13PP12	09-01-2019
				PI14	CT14	A1C14PP12	09-01-2019
			PRT114	PI7	CT7	A1C7PP12	09-01-2019
				PI15	CT15	A1C15PP12	09-01-2019

The following figure graphically illustrates the example 3:

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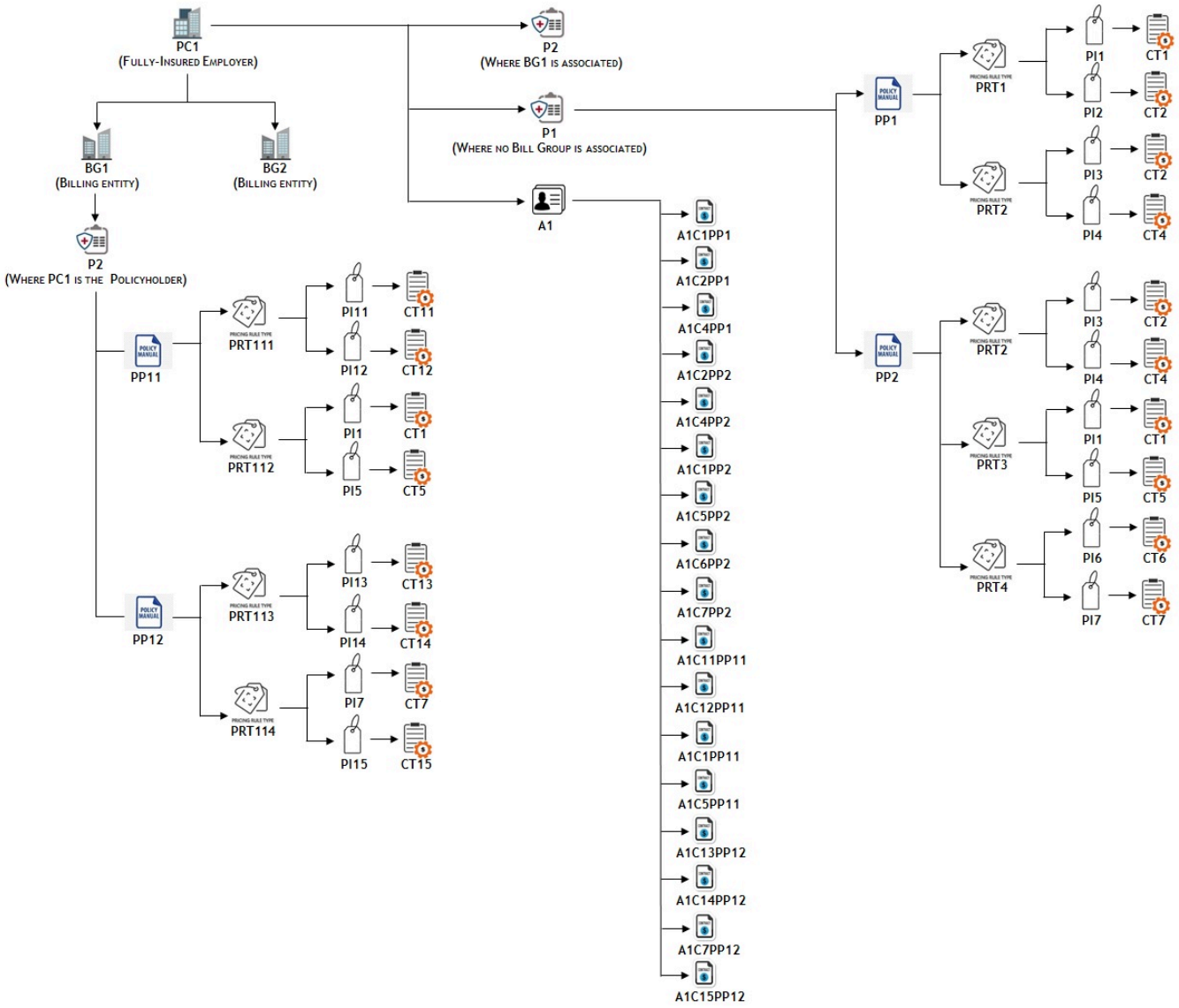

Example 4 - Plan-Specific Contract Creation for an Account of a Bill Group

If you create an account for a bill group who holds policies and its parent customer holds policies (where a bill group may or may not be associated), the system will create one plan-specific contract using each contract type for the bill group's polices and parent customer's polices (where a bill group is not associated) on the account. Let us assume…

- PC1 has two bill groups - BG1 and BG2
- PC1 has two policies - a policy named P2 (where a bill group is not associated) and a policy named P1 (where BG2 is associated)
- BG2 has one policy named P1 where PC1 is the policy holder
- An account named A1 is added for BG2
- P1 has two plans - PP11 and PP12
- P2 has two plans - PP1 and PP2
- PP1 (with the start date as 01-01-2019) is associated with PRT1 and PRT2
- PP2 (with the start date as 04-01-2019) is associated with PRT3 and PRT4
- PP11 (with the start date as 07-01-2019) is associated with PRT11 and PRT12
- PP12 (with the start date as 11-01-2019) is associated with PRT13 and PRT14
- PRT1 contains two price items - PI1 and PI2

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- PRT2 contains two price items - PI3 and PI2
- PRT3 contains two price items - PI3 and PI4
- PRT4 contains two price items - PI5 and PI6
- PRT11 contains two price items - PI111 and PI112
- PRT12 contains two price items - PI1 and PI6
- PRT13 contains two price items - PI113 and PI114
- PRT14 contains two price items - PI115 and PI5
- PI1 is associated with the CT1 contract type, PI2 and PI3 are associated with the CT2 contract type, PI4 is associated with the CT4 contract type, PI5 is associated with the CT5 contract type, PI6 is associated with the CT6 contract type, PI111 is associated with the CT111 contract type, PI112 is associated with the CT112 contract type, PI113 is associated with the CT113 contract type, and PI114 and PI115 is associated with the CT114 contract type

The following table indicates the distinct plan-specific contracts that would be created on the A1 account in the above stated scenario:

Account	**Policy**	**Plan**	**Pricing Rule Type**	**Price Item**	**Contract Type**	**Contract**	**Contract Start Date**
A1	P1	PP11	PRT11	PI111	CT111	A1C111PP11	07-01-2019
				PI112	CT112	A1C112PP11	07-01-2019
			PRT12	PI1	CT1	A1C1PP11	07-01-2019
				PI6	CT6	A1C6PP11	07-01-2019
		PP12	PRT13	PI113	CT113	A1C113PP12	11-01-2019
				PI114	CT114	A1C114PP12	11-01-2019
			PRT14	PI115	CT114	A1C114PP12	11-01-2019
				PI5	CT5	A1C5PP12	11-01-2019
	P2	PP1	PRT1	PI1	CT1	A1C1PP1	01-01-2019
				PI2	CT2	A1C2PP1	01-01-2019
			PRT2	PI2	CT2	A1C2PP1	01-01-2019
				PI3	CT2	A1C2PP1	01-01-2019
		PP2	PRT3	PI3	CT2	A1C2PP2	04-01-2019
				PI4	CT4	A1C4PP2	04-01-2019
			PRT4	PI5	CT5	A1C5PP2	04-01-2019
				PI6	CT6	A1C6PP2	04-01-2019

The following figure graphically illustrates the example 4:

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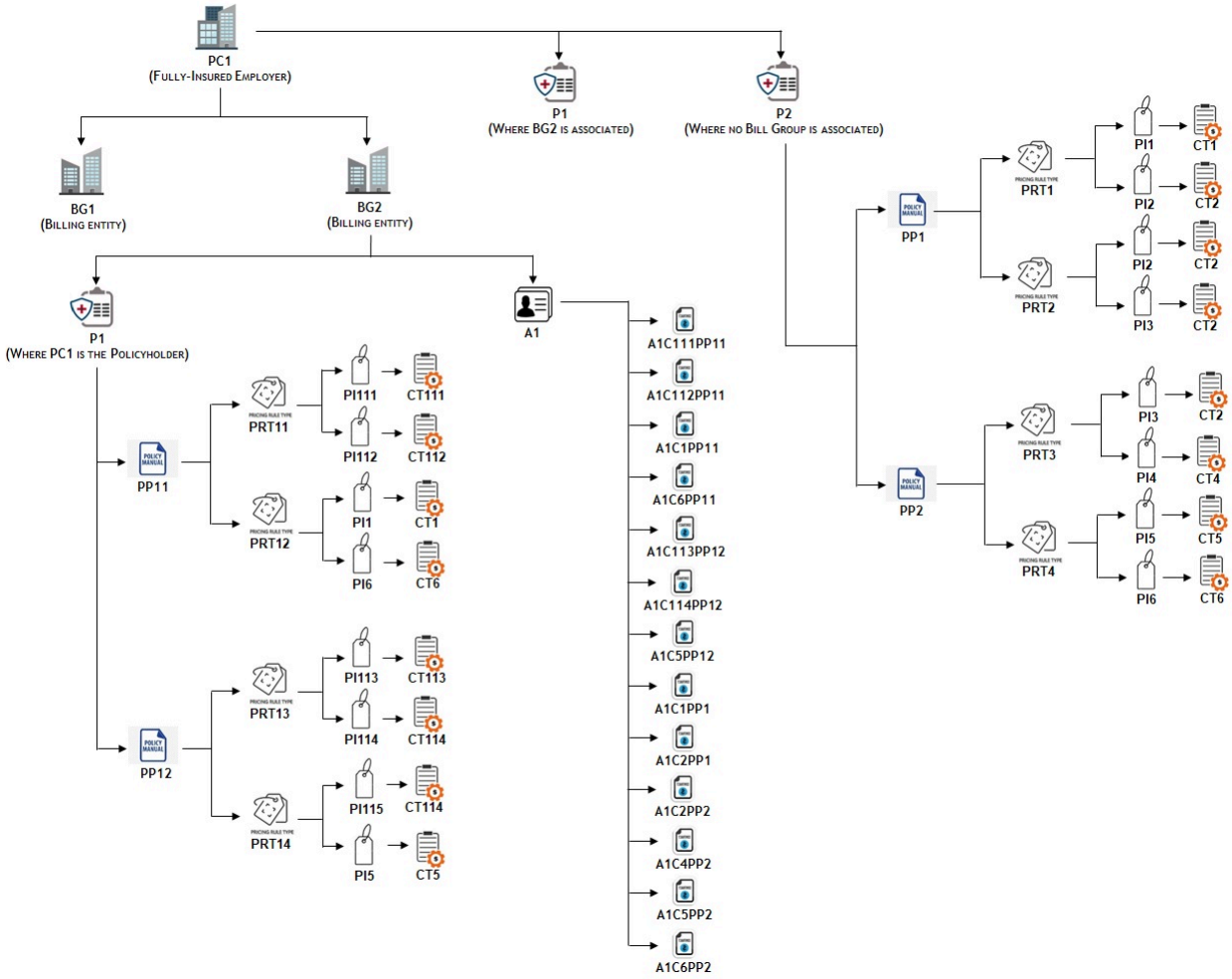

Note: The system creates a contract using a contract type for an account only when the division to which the account and contract type belongs is same.

Fully-Insured Group Policy Status Transition

The following figure graphically indicates how a fully-insured group policy moves from one status to another in its lifecycle:

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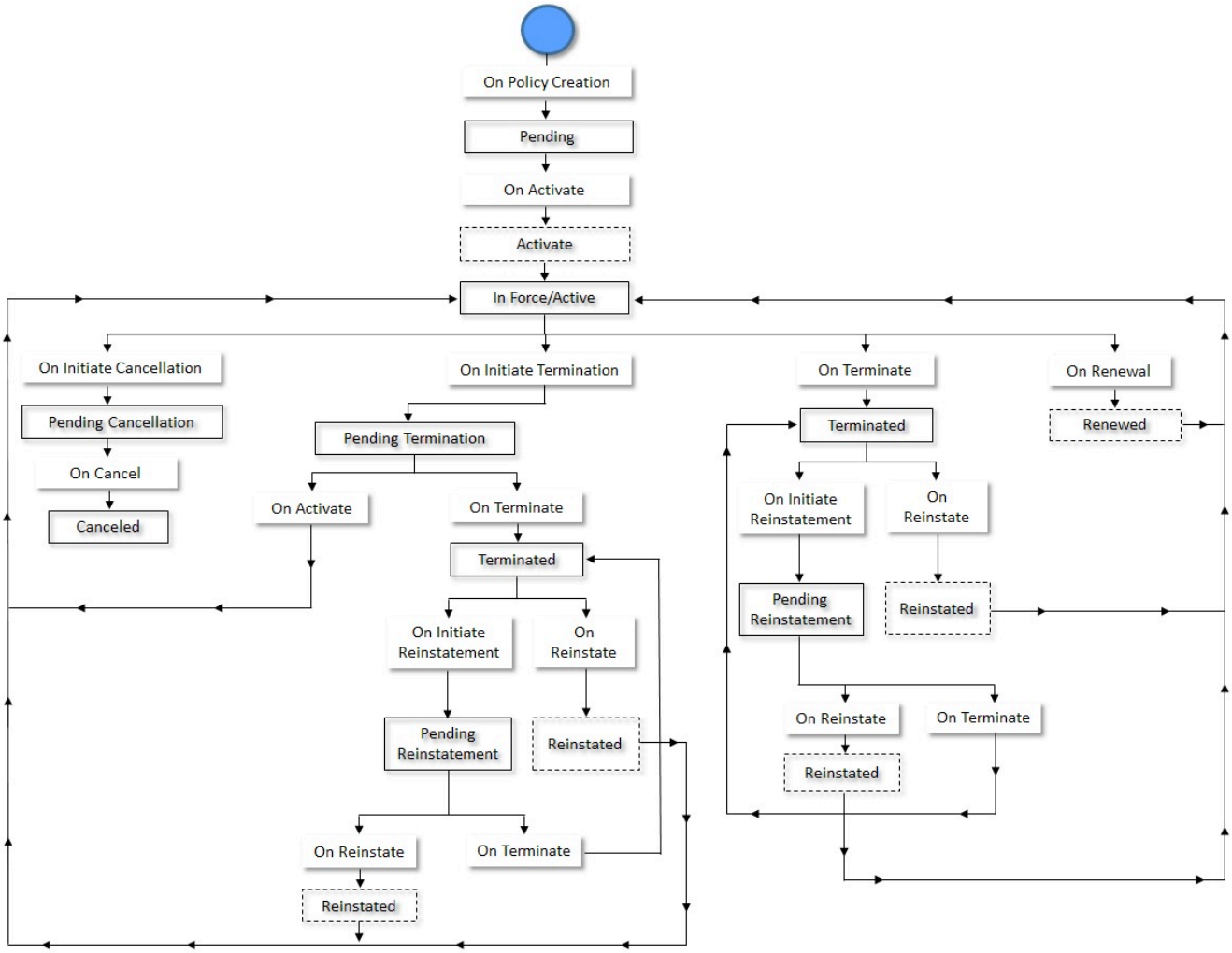
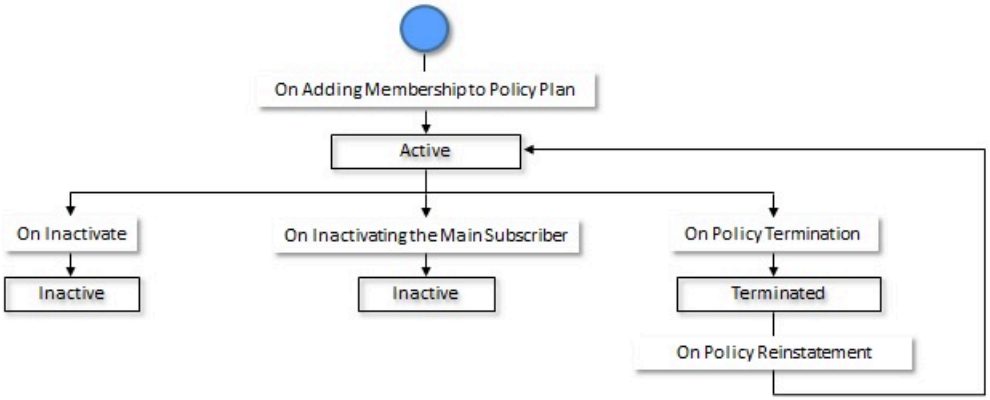


Group Membership Status Transition

The following figure graphically indicates how a membership moves from one status to another in its lifecycle:



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Types of Policy Plan

Oracle Revenue Management and Billing enables you to create different types of plan for a fully-insured group policy:

- Commercial Plans on page 214
- Medicare Affiliated Plans on page 215

Commercial Plans

A commercial plan is a health insurance plan which is offered and administered by non-governmental entities (i.e. insurance companies). It can cover medical or dental expenses and disability income for the insured. Two of the most popular types of commercial health insurance plans are:

- **Preferred Provider Organization (PPO)** - A Preferred Provider Organization (PPO) is a medical care arrangement in which medical professionals and facilities provide services to subscribed clients at reduced rates.
- **Health Maintenance Organization (HMO)** - A Health Maintenance Organization (HMO) is an insurance structure that provides coverage through a network of physicians at a fixed annual fee.

A commercial health insurance plan can be offered to the individual or group customers. Usually, the insurance companies design special commercial health plans for fully-insured group customers and provide cost-effective health coverage for the employees and their family members (at an additional cost).

The system enables you to create and edit a policy plan from the user interface or through a health care inbound message. While creating a Commercial policy plan, you must set the benefit type to **Commercial**. While defining a Commercial policy plan, you need to specify either a price item or at least one pricing rule type. The price item given in the policy plan is used to create a pass-through billable charge for pre-calculated premium amount which is received through a health care inbound message.

Alternatively, you can associate a pricing rule type with a policy plan. You can associate the age based, tier based, pass-through billable charge, and/or additional fee pricing rule types with a Commercial policy plan. If you associate an age based pricing rule type with the policy plan, the system calculates the active employee coverage or COBRA membership premium for eligible members using the age based pricing rule type. If you associate a tier based pricing rule type with the policy plan, the system calculates the active employee coverage or COBRA membership premium using the tier based pricing rule type. The active employee coverage and COBRA membership premium are then charged through the SQI based billable charges. In case of an active employee coverage membership, the charge is billed to the bill group of the fully-insured group customer. However, in case of a COBRA membership, the charge is billed to either of the following depending on the billing arrangement which is defined for the COBRA membership:

- Bill Group of the Fully-Insured Group Customer
- TPA Person
- Financially Responsible Member Person

If you associate an additional fee pricing rule type (which is a related pricing rule type) with the policy plan, the system derives the flat or percentage based additional fee for the COBRA membership using the additional fee pricing rule type. This additional fee is charged along with the COBRA membership premium through an SQI based billable charge

If you associate a pass-through billable charge pricing rule type with the policy plan, the system creates an SQI based billable charge using the pass-through billable charge pricing rule type whenever the price item information is given, but the account information is not given in a health care inbound message. Note that if both the price item and account details are given in the billable charge information of a health care inbound message, the system directly creates the SQI based billable charge for the pre-calculated premium and does not refer to the pass-through billable charge pricing rule type which is associated with the policy plan.

The system enables you to prorate the membership premium using the proration rules defined for the fully-insured group policy plan. A proration rule indicates how you want to prorate the membership premium on various events, such as enrollment, termination, etc. For more information, refer to Premium Proration Rules on page 3480.

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Medicare Affiliated Plans

A Group Medicare Advantage plan, also known as Employer Group Waiver Plan (EGWP), is a type of Medicare Advantage plan offered by some employers to their retired or retiring employees. It may offer more benefits than traditional Medicare Advantage plans. EGWP are provided by private insurance companies who manage fully-insured large group customer's retiree Membership benefits. The different parts of Medicare that EGWPs cover are:

- **Part A** - Medicare Part A insurance is the portion that pays for hospital costs, such as inpatient hospital care or rehabilitation facility care related to illness or injury.
- **Part B** - Medicare Part B is the Medicare portion that pays for doctor visits and related medical costs, including emergency care when you are not admitted.
- **Part D** - Medicare Part D is the prescription drug coverage portion of Medicare. Most prescription drug coverage plans involve different "tiers" of medications where you may pay little to no costs for generic medications and a greater portion of costs for name-brand medicines.

The system enables you to create and edit a policy plan from the user interface or through a health care inbound message. While creating a Medicare Affiliated policy plan, you must set the benefit type to **Medicare Affiliated**. While defining a Medicare Affiliated policy plan, you need to specify either a price item or at least one pricing rule type. The price item given in the policy plan is used to create a pass-through billable charge for pre-calculated premium amount which is received through a health care inbound message.

Alternatively, you can associate a pricing rule type with a policy plan. You can associate the age based, tier based, pass-through billable charge, and/or benefit pricing rule types with a Medicare Affiliated policy plan. If you associate an age based pricing rule type with the policy plan, the system calculates the Medicare premium for Part A, Part B, and/or Part D for eligible members using the age based pricing rule type. If you associate a tier based pricing rule type with the policy plan, the system calculates the Medicare membership premium for Part A, Part B, and Part D using the tier based pricing rule type. This membership premium is then charged through the SQI based billable charge. The charge is billed to either of the following depending on the billing arrangement which is defined for the Medicare membership:

- Bill Group of the Fully-Insured Group Customer
- Financially Responsible Member Person

The system considers the low income subsidy (LIS) and late enrollment penalty (LEP) while calculating the Medicare Part D premium. If you associate a benefit pricing rule type with the policy plan, the system determines the price items through which LIS and LEP should be charged.

If you associate a pass-through billable charge pricing rule type with the policy plan, the system creates an SQI based billable charge using the pass-through billable charge pricing rule type whenever the price item information is given, but the account information is not given in a health care inbound message. Note that if both the price item and account details are given in the billable charge information of a health care inbound message, the system directly creates the SQI based billable charge for the pre-calculated premium and does not refer to the pass-through billable charge pricing rule type which is associated with the policy plan.

The system enables you to prorate the Medicare premium using the proration rules defined for the fully-insured group policy plan. A proration rule indicates how you want to prorate the membership premium on various events, such as enrollment, termination, etc. For more information, refer to Premium Proration Rules on page 3480.

Types of Group Membership

Oracle Revenue Management and Billing enables you to create different types of group membership:

- Active Employee Coverage Membership on page 216
- Medicare Membership on page 217
- COBRA Membership on page 219
- Retiree Membership on page 221

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Active Employee Coverage Membership

Oracle Revenue Management and Billing enables you to maintain an active employee coverage membership for the group insurance health plans and charge age based or tier based premium for the active employee coverage membership. An active employee coverage membership includes the employee or member of the organization who is covered under the group health insurance plan. Here, the covered employee or member is known as the main subscriber of the membership.

If the health insurance coverage is extended to the immediate family and/or other dependents of group members for an extra cost, the active employee coverage membership may include dependents who are related to the main subscriber. The system enables you to define various relationship types using which you can relate main subscriber and other dependent persons in a membership. You can define and edit relationship types through the **Contract Relationship Type** screen. The dependents can be members or non-members in an active employee coverage membership. The system calculates age based premium for both eligible members and non-members in an active employee coverage membership. If you select the **Skip Non-Members** option in the age based pricing rule type, the system will only consider the eligible members and not non-members of the active employee coverage membership during age based premium calculation.

The system enables you to create and edit an active employee coverage membership from the user interface, through a health care inbound message, or through the membership repricing inbound web service. While creating an active employee coverage membership, you must not set the membership type of the membership (i.e. leave the **Membership Type** field blank). Ideally, you must define an active employee coverage membership on a Commercial policy plan. However, at present, the system does not validate whether an active employee coverage membership is defined only on a Commercial policy plan and not on a Medicare Affiliated policy plan.

You can create an active employee coverage membership when you specify the main subscriber of the membership. Ideally, the main subscriber and dependent persons should exist as persons in the system before creating the active employee coverage membership from the user interface, through a health care inbound message, or through the membership repricing inbound web service. The system enables you to create the main subscriber, dependent persons, and active employee coverage membership through the same health care inbound message or through the same membership repricing request. In such case, the system will first create the person records for the main subscriber and dependent persons and then create the active employee coverage membership.

On creating an active employee coverage membership, the status of the membership and main subscriber is set to **Active**. On adding a dependent person to a membership, the status of the dependent person is set to **Active**. You can inactivate an active employee coverage membership from the user interface, through a health care inbound message, or through the membership repricing inbound web service. There are two ways in which you can inactivate the membership from the user interface:

- On clicking the **Inactivate** button
- On inactivating the main subscriber of the membership

However, through a health care inbound message or through the membership repricing inbound web service, you can inactivate the membership only by inactivating the main subscriber of the membership. On inactivating the main subscriber of an active employee coverage membership, the system automatically inactivates the membership and all other member persons which are included in the membership. The status of the active employee coverage membership, main subscriber, and other member persons (if any) is set to **Inactive**. In addition, the system does the following:

- Cancels the billable charges which are created for the membership
- Cancels the corresponding bill segments (if any)

If an audit event exists for the membership which is inactivated, the **BO_STATUS_CD** column corresponding to the record in the **C1_AUDIT_EVENT**, **C1_AUDIT_EVENT_LOG**, and **CI_PRCE_CALC** tables is set to **INVALID**. If a repricing entity detail record exists for the membership in the **PENDING** or **ERROR** status, then the **BO_STATUS_CD** column corresponding to the record in the **CI_REPRC_ENTITY_DTL** table is set to **COMPLETE**. If a repricing request exists for the membership in the **PENDING** or **ERROR** status, then the **BO_STATUS_CD** column corresponding to the record in the **CI_REPRC_REQ_DTL** table is set to **COMPLETE**.

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You can also inactivate a member person, who is not the main subscriber of an active employee coverage membership, from the user interface, through a health care inbound message, or through the membership repricing inbound web service. On inactivating the member person, the status of the member person is set to **Inactive**.

On terminating a fully-insured group policy, the status of all active employee coverage memberships on the respective policy plans is set to **Terminated**. Similarly, on reinstating a fully-insured group policy, the status of all active employee coverage memberships on the respective policy plans is set to **Active**.

The system requires the following information to create charges for an active employee coverage membership:

- Whom to bill the active employee coverage membership charges
- Age based or tier based pricing rules using which the premium should be calculated for the active employee coverage membership
- Respective age based or tier based pricing rule type associated with the respective policy plan

The system supports the following billing arrangements for an active employee coverage membership:

- **Group Billing** - Here, an active employee coverage membership is billed to a bill group which is derived for the active employee coverage membership.
- **Direct Billing** - Here, an active employee coverage membership is billed to the member who is financially responsible for the active employee coverage membership.

You can indicate the billing arrangement for the active employee coverage memberships by defining a characteristic on the bill group or parent customer. The system searches for the characteristic which is specified in the **Billing Arrangement** option type of the **C1-ASOBLLNG** feature configuration on the following entities in the specified sequence:

1. Bill Group
2. Parent Customer

Note: If the billing arrangement characteristic is not defined for any of the above listed entities, the system, by default, charges the active employee coverage membership premium to the bill group.

The system requires the bill group and its account to bill the active employee coverage memberships when the billing arrangement is set to **Group Billing**. You can create a bill group and its account from the user interface or through a health care inbound message. On creating an account for a bill group, the system automatically creates a contract on the account using distinct contract types for all policy plans of the parent customer and bill group policies. While creating a contract, the system considers all price items in all pricing rule types (including the related pricing rule types) which are associated with the policy plans of the parent customer and bill group policies.

The system requires the member person's account to bill the active employee coverage membership when the billing arrangement is set to **Direct Billing**. You can create an account for a member person who is financially responsible for the active employee coverage membership through a health care inbound message. On creating an account for a member person, the system automatically creates a contract on the account using distinct contract types for the respective policy plan. While creating a contract, the system considers all price items in all pricing rule types (including the related pricing rule types) which are associated with the respective policy plan.

Medicare Membership

Oracle Revenue Management and Billing enables you to maintain an employer sponsored group medicare membership (800 series plans) for a fully-insured large group customer and create age based or tier based premium charges for the Medicare Part A, Part B, and Part D. A Medicare beneficiary may qualify for a low income subsidy (LIS) for Medicare Part D or may incur late enrollment penalty (LEP) for Medicare Part D. In such case, the system enables you to consider the low income subsidy (LIS) and late enrollment penalty (LEP) while calculating the Medicare Part D premium.

The system enables you to create and edit a Medicare membership from the user interface, through a health care inbound message, or through the membership repricing inbound web service. While creating a Medicare membership, you must set the membership type to **Medicare**. Ideally, you must define a Medicare membership on a Medicare Affiliated policy

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plan. However, at present, the system does not validate whether a Medicare membership is defined only on a Medicare Affiliated policy plan and not on a Commercial policy plan.

You can create a Medicare membership when you specify the main subscriber of the membership. A Medicare membership should have only one member person who is covered for Medicare and who is financially responsible for the membership. Ideally, the main subscriber should exists as a person in the system before creating the Medicare membership from the user interface, through a health care inbound message, or through the membership repricing inbound web service. The system enables you to create the main subscriber and Medicare membership through the same health care inbound message or through the same membership repricing request. In such case, the system will first create the person record for the main subscriber and then create the Medicare membership.

On creating a Medicare membership, the status of the membership and main subscriber is set to **Active**. You can inactivate a Medicare membership from the user interface, through a health care inbound message, or through the membership repricing inbound web service. There are two ways in which you can inactivate the membership from the user interface:

- On clicking the **Inactivate** button
- On inactivating the main subscriber of the membership

However, through a health care inbound message or through the membership repricing inbound web service, you can inactivate the membership only by inactivating the main subscriber of the membership. On inactivating a Medicare membership, the system does the following:

- Set the status of the membership and main subscriber to **Inactive**
- Cancels the billable charges which are created for the membership
- Cancels the corresponding bill segments (if any)

If an audit event exists for the membership which is inactivated, the **BO_STATUS_CD** column corresponding to the record in the **C1_AUDIT_EVENT**, **C1_AUDIT_EVENT_LOG**, and **CI_PRCE_CALC** tables is set to **INVALID**. If a repricing entity detail record exists for the membership in the **PENDING** or **ERROR** status, then the **BO_STATUS_CD** column corresponding to the record in the **CI_REPRC_ENTITY_DTL** table is set to **COMPLETE**. If a repricing request exists for the membership in the **PENDING** or **ERROR** status, then the **BO_STATUS_CD** column corresponding to the record in the **CI_REPRC_REQ_DTL** table is set to **COMPLETE**.

On terminating a fully-insured group policy, the status of all Medicare memberships on the respective policy plans is set to **Terminated**. Similarly, on reinstating a fully-insured group policy, the status of all Medicare memberships on the respective policy plans is set to **Active**.

The system enables you to maintain the Membership benefits (such as, Part A, Part B, Part D, Part D LIS, and Part D LEP) of a member person through the **Benefit** screen. The system enables you to define and edit the Membership benefits from the user interface, through a health care inbound message, or through the membership repricing inbound web service. While defining a Membership benefit of a member person for Part A, Part B, and Part D, you need to specify a Medicare plan benefit package (i.e. 800 series plan) which is applicable for the Membership benefit. The system enables you to define and edit a Medicare plan benefit package through the **Field Mapping** screen. You can use the Medicare plan benefit package as a pricing parameter in the age based or tier based pricing rules using which the Medicare premium is calculated. While defining a Membership benefit of a member person for Part D LIS and Part D LEP, you need to specify the benefit amount (i.e. subsidy or penalty amount).

While editing a Membership benefit of a member person from the user interface, you can only edit the characteristics of the Membership benefit. However, while editing a Membership benefit of a member person through a health care inbound message or through the membership repricing inbound web service, you can edit the end date, benefit amount, and characteristics of the Membership benefit. On editing a Membership benefit, the system inactivates the old record and creates a new record in the system. The status of the old benefit record is set to **Inactive** and the status of the new benefit record is set to **Active**.

The system enables you to discard an active or inactive Membership benefit from the user interface by clicking the **Discard** button. You can also discard an active or inactive Membership benefit through a health care inbound message or through the membership repricing inbound web service by changing its status to **Discarded**.

The system requires the following information to create charges for a Medicare membership:

- Whom to bill the Medicare membership (i.e. billing arrangement details)

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- Age based or tier based pricing rules using which the premium should be calculated for the Medicare Part A, Part B, and Part D.
- Respective age based, tier based, and benefit pricing rule types associated with the respective policy plan

The system supports the following billing arrangements for a Medicare membership:

- **Group Billing** - Here, a Membership benefit is billed to a bill group which is derived for the Medicare membership.
- **Direct Billing** - Here, a Membership benefit is billed to a member person who is financially responsible for the Medicare membership.

You can indicate the billing arrangement for the Medicare memberships by defining a characteristic on the policy plan, policy, or parent customer. The system searches for the characteristic which is specified in the **Benefit Billing Arrangement** option type of the **C1-ASOBLLNG** feature configuration on the following entities in the specified sequence:

1. Policy Plan
2. Policy
3. Parent Customer

Note: If the benefit billing arrangement characteristic is not defined for any of the above listed entities, the system, by default, charges the Medicare membership premium to the bill group.

The system requires the bill group and its account to bill the Medicare memberships when the benefit billing arrangement is set to **Group Billing**. You can create a bill group and its account from the user interface or through a health care inbound message. On creating an account for a bill group, the system automatically creates a contract on the account using distinct contract types for all policy plans of the parent customer and bill group policies. While creating a contract, the system considers all price items in all pricing rule types (including the related pricing rule types) which are associated with the policy plans of the parent customer and bill group policies.

The system requires the member person's account to bill the Medicare membership when the benefit billing arrangement is set to **Direct Billing**. You can create an account for a member person who is financially responsible for the Medicare membership through a health care inbound message. On creating an account for a member person, the system automatically creates a contract on the account using distinct contract types for the respective policy plan. While creating a contract, the system considers all price items in all pricing rule types (including the related pricing rule types) which are associated with the respective policy plan.

COBRA Membership

Oracle Revenue Management and Billing enables you to maintain a COBRA membership and charge age based or tier based premium and administration fee for the COBRA membership. In COBRA membership, an employer provides temporary continuation of group health coverage in certain situations where it would otherwise be terminated. This may be include situations, such as:

- Death of the covered employee
- Reduction in the hours or termination of the covered employee's employment
- Covered employee becoming entitled for Medicare
- Divorce or legal separation from the covered employee
- A dependent child ceasing to be a dependent in an active employee coverage membership

The system enables you to create and edit a COBRA membership from the user interface, through a health care inbound message, or through the membership repricing inbound web service. While creating a COBRA membership, you must set the membership type to **COBRA**. Ideally, you must define a COBRA membership on a Commercial policy plan. However, at present, the system does not validate whether a COBRA membership is defined only on a Commercial policy plan and not on a Medicare Affiliated policy plan.

Through a health care inbound message, the system must receive the end date of the active employee coverage membership along with the details of the COBRA membership. You can create a COBRA membership when you specify the main subscriber of the membership. Here, the main subscriber can be an employee or member of the organization

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or a family member who is covered through the COBRA membership. In a COBRA membership, you need to specify the member person who is financially responsible for the COBRA membership. Note that, at a time, only one member person can be financially responsible for the COBRA membership.

On creating a COBRA membership, the status of the membership and main subscriber is set to **Active**. On adding a dependent person to a membership, the status of the dependent person is set to **Active**. You can inactivate a COBRA membership from the user interface, through a health care inbound message, or through the membership repricing inbound web service. There are two ways in which you can inactivate the membership from the user interface:

- On clicking the **Inactivate** button
- On inactivating the main subscriber of the membership

However, through a health care inbound message or through the membership repricing inbound web service, you can inactivate the membership only by inactivating the main subscriber of the membership. On inactivating the main subscriber of a COBRA membership, the system automatically inactivates the membership and all other member persons which are included in the membership. The status of the COBRA membership, main subscriber, and other member persons (if any) is set to **Inactive**. In addition, the system does the following:

- Cancels the billable charges which are created for the membership
- Cancels the corresponding bill segments (if any)

If an audit event exists for the membership which is inactivated, the **BO_STATUS_CD** column corresponding to the record in the **C1_AUDIT_EVENT**, **C1_AUDIT_EVENT_LOG**, and **CI_PRCE_CALC** tables is set to **INVALID**. If a repricing entity detail record exists for the membership in the **PENDING** or **ERROR** status, then the **BO_STATUS_CD** column corresponding to the record in the **CI_REPRC_ENTITY_DTL** table is set to **COMPLETE**. If a repricing request exists for the membership in the **PENDING** or **ERROR** status, then the **BO_STATUS_CD** column corresponding to the record in the **CI_REPRC_REQ_DTL** table is set to **COMPLETE**.

You can also inactivate a member person, who is not the main subscriber of a COBRA membership, from the user interface, through a health care inbound message, or through the membership repricing inbound web service. On inactivating a member person, the status of the member person is set to **Inactive**.

On terminating a fully-insured group policy, the status of all COBRA memberships on the respective policy plans is set to **Terminated**. Similarly, on reinstating a fully-insured group policy, the status of all COBRA memberships on the respective policy plans is set to **Active**.

The system requires the following information to create charges for a COBRA membership:

- Whom to bill the COBRA membership (i.e. billing arrangement details)
- Age based or tier based pricing rules using which the premium should be calculated for the COBRA membership
- Respective age based or tier based pricing rule type associated with the respective policy plan
- Additional fee pricing rule using which the administration fee should be calculated for the COBRA membership
- Respective additional fee pricing rule type associated with the respective policy plan

The system supports the following billing arrangements for a COBRA membership:

- **Group Billing** - Here, a COBRA membership is billed to a bill group which is derived for the COBRA membership.
- **TPA Billing** - Here, a COBRA membership is billed to the third party administrator (i.e. TPA person).
- **Direct Billing** - Here, a COBRA membership is billed to the member who is financially responsible for the COBRA membership.

You can indicate the billing arrangement for the COBRA memberships by defining a characteristic on the policy plan, policy, or parent customer. The system searches for the characteristic which is specified in the **Cobra Billing Arrangement** option type of the **C1-ASOBLLNG** feature configuration on the following entities in the specified sequence:

1. Policy Plan
2. Policy
3. Parent Customer

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Note: If the Cobra billing arrangement characteristic is not defined for any of the above listed entities, the system, by default, charges the COBRA membership premium to the bill group.

The system requires the bill group and its account to bill the COBRA memberships when the COBRA billing arrangement is set to **Group Billing**. You can create a bill group and its account from the user interface or through a health care inbound message. On creating an account for a bill group, the system automatically creates a contract on the account using distinct contract types for all policy plans of the parent customer and bill group policies. While creating a contract, the system considers all price items in all pricing rule types (including the related pricing rule types) which are associated with the policy plans of the parent customer and bill group policies.

The system requires the third party administrator (i.e. TPA person) and its account to bill the COBRA memberships when the COBRA billing arrangement is set to **TPA Billing**. You can create a third party administrator (i.e. TPA person) and its accounts through a health care inbound message. While sending the details of a TPA person through an inbound message, you must specify the parent of the TPA person and its account details. The system associates the parent customer with the TPA person using the relationship type which is specified in the **TPA Person Relationship Type** option type of the **C1-ASOBLLNG** feature configuration. If the person type specified in the health care inbound message matches the person type specified in the **TPA Person Type** option type of the **C1-PERSTYPE** feature configuration, the system creates or updates the TPA person and its account through a customer registration object. However, if the person type specified in the health care inbound message does not match the person type specified in the **TPA Person Type** option type of the **C1-PERSTYPE** feature configuration, the system creates or updates the TPA person and its accounts directly and not through a customer registration object.

The system associates the TPA person with the TPA account using the relationship type which is specified in the **TPA Account Relationship Type** option type of the **C1-ASOBLLNG** feature configuration. On creating an account for a TPA person, the system automatically creates a contract on the account using distinct contract types for all policy plans of the parent customer and bill group policies. While creating a contract, the system considers all price items in all pricing rule types (including the related pricing rule types) which are associated with the policy plans of the parent customer and bill group policies.

The system requires the member person's account to bill the COBRA membership when the COBRA billing arrangement is set to **Direct Billing**. You can create an account for a member person who is financially responsible for the COBRA membership through a health care inbound message. On creating an account for a member person, the system automatically creates a contract on the account using distinct contract types for the respective policy plan. While creating a contract, the system considers all price items in all pricing rule types (including the related pricing rule types) which are associated with the respective policy plan.

Retiree Membership

An employer may offer a retirement health plan coverage to its retired employees through a fully-insured group policy or an individual can independently opt for a government sponsored retirement health plan coverage. Oracle Revenue Management and Billing enables you to maintain a retiree membership for both the fully-insured group and individual business. The system enables you to maintain a flat or percentage based contribution of employer or sponsor for a retiree membership.

The system enables you to create and edit a retiree membership through a health care inbound message or through membership repricing inbound web service. While creating a retiree membership, the membership type must be set to **Retiree**. The system requires the following information to create charges for a retiree membership:

- Whom to bill the premium for the retiree membership (i.e. retiree billing arrangement details)
- Whom to bill the employer or sponsor contribution (i.e. sponsor billing arrangement details)
- Age based or tier based pricing rule using which the premium should be calculated for the retiree membership
- Discount charge pricing rule using which the employer or sponsor contribution should be calculated for the retiree membership

In case of the fully-insured individual business, the premium for a retiree membership is billed to the member who is financially responsible for the retiree membership. However, in case of the fully-insured group business, the system supports the following billing arrangements for the retiree membership:

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- **Group Billing** - Here, the premium is billed to a bill group which is derived for the retiree membership.
- **TPA Billing** - Here, the premium is billed to the third party administrator (i.e. TPA person).
- **Direct Billing** - Here, the premium is billed to the member who is financially responsible for the retiree membership.

You can indicate the billing arrangement for a retiree membership in the fully-insured group business by defining a characteristic on the policy plan, policy, or parent customer. The system searches for the characteristic which is specified in the **Retiree Billing Arrangement** option type of the **C1-ASOBLLNG** feature configuration on the following entities in the specified sequence:

1. Policy Plan
2. Policy
3. Parent Customer

The system enables you to maintain a flat or percentage based contribution of employer or sponsor through a discount charge pricing rule. A field named **Sponsored** is available in the **Price Items** section while defining or editing a discount charge pricing rule type. If the **Sponsored** option is selected for a price item, the system creates and bills the charge for the price item as per the sponsor billing arrangement. The system searches for the characteristic which is specified in the **Sponsors Billing Arrangement** option type of the **C1-ASOBLLNG** feature configuration on the following entities in the specified sequence:

1. Policy Plan
2. Policy
3. Parent Customer

In the fully-insured group and individual business, the system supports the following sponsor billing arrangements for the retiree membership:

- **Group Billing** - Here, the system creates a negative charge for the employer or sponsor contribution against the beneficiary account and a positive charge for the employer or sponsor contribution against the sponsor account.
- **TPA Billing** - Here, the system creates a negative charge for the employer or sponsor contribution against the beneficiary account and a positive charge for the employer or sponsor contribution against the sponsor account.
- **Direct Billing** - Here, the system creates a memo only charge for the employer or sponsor contribution against the beneficiary account. A bill message code is derived from the **Retiree Bill Message Code** option type of the **C1-ASOBLLNG** feature configuration and stamped against the beneficiary account.

In case of the group and TPA billing, the system derives the characteristic types which are specified in the **Sponsor Account Identifier Type Char Type** and **Sponsor Account Identifier Value Char Type** option types of the **C1-ASOBLLNG** feature configuration. The system then checks whether these characteristics are defined on any of the following entity in the specified sequence:

1. Policy Plan
2. Policy
3. Parent Customer

If these characteristics are defined on any of the above entity, the system derives the sponsor account for the bill group. The system then bills the employer or sponsor contribution charges to the sponsor account.

However, if the **Sponsored** option is not selected for a price item in a discount charge pricing rule type, the system creates and bills the charge for the price item as per the retiree billing arrangement.

Algorithms Used in C1-POLICY

The following table lists the algorithms which are attached to the **C1-POLICY** business object:

System Event	Algorithm	Algorithm Type	Description
Audit	C1-REAUDEVNT	C1-REAUDEVNT	Refer to C1-REAUDEVNT on page 223.

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System Event	Algorithm	Algorithm Type	Description
Validation	C1-POLBOVAL	C1-POLBOVAL	Refer to C1-POLBOVAL on page 224.

The following table lists the algorithms which are used in the lifecycle of the **C1-POLICY** business object:

Status	System Event	Algorithm	Algorithm Type	Description
Pending	Monitor	C1-TRNDFLSYS	C1-TRNDFLSYS	Refer to C1-TRNDFLSYS on page 225.
Activate	Monitor	F1-AT-RQJ	F1-GEN-BOMNJ	Refer to F1-AT-RQJ on page 225.
In Force/Active	Enter	C1-EVCSTSTAT	C1-EVCSTSTAT	Refer to C1-EVCSTSTAT on page 225.
Pending Termination	Enter	C1-PLCYTRMRQ	C1-PLCYTRMRQ	Refer to C1-PLCYTRMRQ on page 225.
Terminated	Enter	C1-POLCYTERM	C1-POLCYTERM	Refer to C1-POLCYTERM on page 226.
	Enter	C1-DELTRMLTR	C1-CRTCUSCNT	Refer to C1-DELTRMLTR on page 226.
	Enter	C1-EVCSTSTAT	C1-EVCSTSTAT	Refer to C1-EVCSTSTAT on page 225.
Pending Reinstatement	Enter	C1-PLCYREIRQ	C1-PLCYREIRQ	Refer to C1-PLCYREIRQ on page 227.
Reinstated	Monitor	F1-AT-RQJ	F1-GEN-BOMNJ	Refer to F1-AT-RQJ on page 225.
	Enter	C1-POLCYREIN	C1-POLCYREIN	Refer to C1-POLCYREIN on page 227.
	Enter	C1-CCPOLRE1	C1-CRTCUSCNT	Refer to C1-CCPOLRE1 on page 228.
Renewed	Monitor	F1-AT-RQJ	F1-GEN-BOMNJ	Refer to F1-AT-RQJ on page 225.
Pending Cancellation	-	-	-	-
Canceled	-	-	-	-

C1-REAUDEVNT

If this algorithm is attached to the **Audit** system event of a business object, it is invoked whenever you define, edit, or delete the respective entity. It checks whether an active audit event type exists for the entity business object. If so, it considers the active audit event type and creates the audit event using the respective audit event type. The system creates the audit event while:

- Defining an entity when the **Add Action** option is selected in the audit event type.
- Editing an entity when the **Update All** option is selected in the audit event type or when the updated element is listed in the **Audit Elements for Entity Update** section.
- Deleting an entity when the **Delete Action** option is selected in the audit event type.

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The entity type and entity ID for which an audit event is created are added corresponding to the audit event in the **C1_AUDIT_EVENT** table. In addition, the effective date is stamped corresponding to the audit event in the **C1_AUDIT_EVENT** table. Note that if the entity has a start date, then the effective date is set to the entity's start date. But, if the entity does not have a start date, then the effective date is set to the system date.

Note: Before creating an audit event, the system checks whether an audit event for the entity ID with the same effective date already exists in the **Pending** or **Error** status for the respective action. If so, the system does not create a new audit event for the entity. Instead, the system adds a new log entry in the existing audit event

At present, this algorithm is designed to work with the business objects of the following maintenance objects:

- C1-POLICY
- C1-ASOPolicy
- C1-Membership
- C1-PolicyPlan
- C1_PERSON_BO
- C1-PricingRuleTierBased
- C1-PricingRuleAgeBased

In case, you want to create audit event for any other maintenance objects, you need to create a custom algorithm type.

It contains the following parameters:

- **Audit Event Business Object** - Used to specify the business object using which you want to create the audit event.
- **Audit Event Pending Status** - Used to specify the status in which you want to create the audit event. This parameter is also used for determining whether an audit event for the entity ID already exists in the system.
- **Audit Event Error Status** - Used to specify the status in which an audit event is transitioned when an error occurs while processing the audit event. This parameter is used for determining whether an audit event for the entity ID already exists in the system.

All the above parameters are mandatory.

C1-POLBOVAL

This algorithm validates a fully-insured group policy throughout its lifecycle. It checks the following:

- Whether the policy end date is not earlier than the policy start date.
- Whether the policy person end date is not earlier than the policy person start date.
- Whether the policy person start date is not earlier than the policy start date or later than policy end date.
- Whether the policy person end date is not earlier than the policy start date or later than policy end date.

  Note: The above validation is done when the policy is transition to the status which is not specified in the **Skip Status for Policy Person End Date Validation** parameter. For example, if you set the **Skip Status for Policy Person End Date Validation** parameter to **TERMINATED**, the system will not perform the above validation when the status of the policy is changed to **Terminated**.
- Whether the person who is the main customer is associated with the policy.
- Whether the policy person role is specified while associating a person with the policy.

It contains the following parameter:

- **Skip Status for Policy Person End Date Validation** - Used to specify the policy status in which you do not want to validate the policy person end date. You can specify comma-separated values for this parameter.

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C1-TRNDFLSYS

This algorithm checks whether the fully-insured group policy is created from the user interface or through an inbound message. If a fully-insured group policy is created through an inbound message, the system will automatically transition the fully-insured group policy to the default next status specified in its lifecycle.

F1-AT-RQJ

This algorithm transitions the current status of the business object to the specified status. It contains the following parameters:

- **Next Status** – Used when you want to override the default next status specified in the lifecycle.
- **Next Transition Condition** – Used when you want to override the default next transition condition specified in the lifecycle.

At a time, you can specify value for either the **Next Status** or **Next Transition Condition** parameter. If you don't specify any value for these parameters, the system will transition the business object to the default next status specified in its lifecycle.

C1-EVCSTSTAT

This algorithm updates the **Customer Status** characteristic of the main customer of the policy. This characteristic indicates whether the customer is active or inactive. If the customer owns at least one active policy, the customer status is set to **Active**. However, if the customer does not own any active policy, the customer status is set to **Inactive**.

It is invoked while activating or terminating a fully-insured group policy. It contains the following parameters:

- **Customer Status Characteristic Type** - Used to specify the characteristic type whose value should be updated whenever the policy is activated or terminated. You must specify a characteristic type where the characteristic entity is set to **Person**.
- **Active Customer Status Characteristic Value** - Used to specify the characteristic value which should be used when the main customer owns at least one active policy.
- **Inactive Customer Status Characteristic Value** - Used to specify the characteristic value which should be used when the main customer does not own any active policy (in other words, when all policies of the main customer are terminated).
- **Policy Active Status** - Used to specify the status in which at least one policy should exist to indicate that the main customer is active.

All the above parameters are mandatory.

C1-PLCYTRMRQ

This algorithm creates an outbound message using the outbound message type whenever you initiate the policy termination process from the user interface. While creating the outbound message, the system identifies the account using the characteristic type specified in the **Main Customer Characteristic Type** parameter. The system checks whether this characteristic type is set to the main customer's ID on any account. If so, the system considers the account and then fetches the value of the account identifier type specified in the **Account Identifier Type** parameter.

In addition, it stores the details of the outbound message (which is created) in the log of the policy. It contains the following parameters:

- **Outbound Message Type** - Used to specify the outbound message type using which you want to create the outbound message. You must specify an outbound message type which is already defined in the system.

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- **Source System** - Used to specify the source system that you want to use in the outbound message. You must specify a source system which is already defined in the **C1-SourceSystemLookup** extendable lookup.
- **Account Identifier Type** - Used to specify the account identifier type whose value you want to use in the outbound message. You must specify an account identifier type which is already defined in the system.
- **Main Customer Characteristic Type** - Used to specify the characteristic type using which you want to identify the account of the main customer. You must specify a characteristic type where the characteristic entity is set to **Person**.

All the above parameters are mandatory.

C1-POLCYTERM

This algorithm sets the end date of the following entities to the termination date when the respective condition is met:

- Policy (when the termination date is not earlier than the policy start date or later than the policy end date)
- Policy Person (when the termination date falls within the date range in which the person is associated with the policy)
- Policy Plan (when the termination date falls within the date range of the policy plan)
- Membership (when the termination date falls within the date range of the membership)
- Member Person (when the termination date falls within the date range in which the person is added to the membership)
- Contracts Associated with the Membership (when the termination date falls within the date range of the contract)

It contains the following parameters:

- **Membership Old Status** - Used to specify the status from which you want to transition the membership when the policy is terminated.
- **Membership New Status** - Used to specify the status to which you want to transition the membership when the policy is terminated.

C1-DELTRMLTR

This algorithm creates a customer contact whenever the policy is transition to the status where it is attached. For example, if this algorithm is attached to the **TERMINATED** status, it creates a customer contact whenever the policy is terminated. You can create a customer contact while terminating a policy. Optionally, you can configure the algorithm such that a customer contact is created when a particular status reason is specified while terminating a policy.

Once a customer contact is created, the policy for which the customer contact is created is stored as a characteristic on the customer contact. In addition, the customer contact which is created for the policy is stored as a characteristic in the log of the policy.

It contains the following parameters:

- **Check Policy Status Reason** - Used when you want to create a customer contact when the policy is terminated for a particular reason. The valid values are:
  - **Y** - Used to indicate that the system should create a customer contact when a particular status reason is specified while terminating a policy.
  - **N** - Used to indicate that the system should create a customer contact while terminating a policy irrespective of the status reason.
- **Policy Status Reason Codes** - Used to specify the status reason defined for the **TERMINATED** status. You can specify comma-separated values for this parameter.
- **Customer Contact Class** - Used to specify the customer contact class using which you want to create the customer contact. This field is mandatory.
- **Customer Contact Type** - Used to specify the customer contact type using which you want to create the customer contact. This field is mandatory.
- **Consolidate Customer Contact** - Used to indicate whether the system should update the existing customer contact or create a new customer contact for the main customer of the policy. The valid values are:

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- **Y** - If this parameter is set to **Y**, the system checks whether a customer contact is already created for the main customer of the policy on the system date. If so, the system does not create a new customer contact. Instead, it updates the existing customer contact of the main customer of the policy. However, if the customer contact is not already created on the system date, the system creates a new customer contact for the main customer of the policy.
- **N** - If this parameter is set to **N**, the system creates a new customer contact for the main customer of the policy and does not update the existing customer contact, if any.

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

- **Policy ID Characteristic Type** - Used to specify the characteristic type which you want to define for the customer contact. This characteristic indicates the policy for which the customer contact is created. You must specify a characteristic type where the characteristic entity is set to **Customer Contact**. This field is mandatory.
- **Customer Contact Characteristic Type** - Used to specify the characteristic type which you want to use in the log of the policy. This characteristic indicates the customer contact which is created for the policy. You must specify a characteristic type where the characteristic entity is set to **Policy**. This field is mandatory.
- **Status To Skip Process** - Used when you do not want to create the customer contact when the policy is transition to a particular status. You can specify comma-separated values for this parameter.

C1-PLCYREIRQ

This algorithm creates an outbound message using the outbound message type whenever you initiate the policy reinstatement process from the user interface. In addition, it stores the details of the outbound message (which is created) in the log of the policy.

It contains the following parameters:

- **Outbound Message Type** - Used to specify the outbound message type using which you want to create the outbound message. You must specify an outbound message type which is already defined in the system.
- **Source System** - Used to specify the source system that you want to use in the outbound message. You must specify a source system which is already defined in the **C1-SourceSystemLookup** extendable lookup.

All the above parameters are mandatory.

C1-POLCYREIN

This algorithm updates the end date of the following entities to the respective original end date:

- Policy
- Policy Person
- Policy Plan
- Membership
- Member Person
- Contracts Associated with the Membership

Note: The system stores the original end date of the above listed entities when you define or edit a policy, policy plan, or membership.

Here, the assumption is that the pass-through billable charges information for the membership will be sent again through an inbound message along with the reinstatement reason. And, therefore the exiting billable charges will not be extended.

It contains the following parameters:

- **Membership Old Status** - Used to specify the status from which you want to transition the membership when the policy is reinstated.
- **Membership New Status** - Used to specify the status to which you want to transition the membership when the policy is reinstated. This field is mandatory.

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C1-CCPOLRE1

This algorithm creates a customer contact whenever the policy is transition to the status where it is attached. For example, if this algorithm is attached to the **REINSTATE** status, it creates a customer contact whenever the policy is reinstated. You can create a customer contact while reinstating a policy. Optionally, you can configure the algorithm such that a customer contact is created when a particular status reason is specified while reinstating a policy.

Once a customer contact is created, the policy for which the customer contact is created is stored as a characteristic on the customer contact. In addition, the customer contact which is created for the policy is stored as a characteristic in the log of the policy.

It contains the following parameters:

- **Check Policy Status Reason** - Used when you want to create a customer contact when the policy is reinstated for a particular reason. The valid values are:
  - **Y** - Used to indicate that the system should create a customer contact when a particular status reason is specified while reinstating a policy.
  - **N** - Used to indicate that the system should create a customer contact while reinstating a policy irrespective of the status reason.
- **Policy Status Reason Codes** - Used to specify the status reason defined for the **REINSTATE** status. You can specify comma-separated values for this parameter.
- **Customer Contact Class** - Used to specify the customer contact class using which you want to create the customer contact. This field is mandatory.
- **Customer Contact Type** - Used to specify the customer contact type using which you want to create the customer contact. This field is mandatory.
- **Consolidate Customer Contact** - Used to indicate whether the system should update the existing customer contact or create a new customer contact for the main customer of the policy. The valid values are:
  - **Y** - If this parameter is set to **Y**, the system checks whether a customer contact is already created for the main customer of the policy on the system date. If so, the system does not create a new customer contact. Instead, it updates the existing customer contact of the main customer of the policy. However, if the customer contact is not already created on the system date, the system creates a new customer contact for the main customer of the policy.
  - **N** - If this parameter is set to **N**, the system creates a new customer contact for the main customer of the policy and does not update the existing customer contact, if any.

  Note: If you do not specify the value for this parameter, by default, it is set to **N**.
- **Policy ID Characteristic Type** - Used to specify the characteristic type which you want to define for the customer contact. This characteristic indicates the policy for which the customer contact is created. You must specify a characteristic type where the characteristic entity is set to **Customer Contact**. This field is mandatory.
- **Customer Contact Characteristic Type** - Used to specify the characteristic type which you want to use in the log of the policy. This characteristic indicates the customer contact which is created for the policy. You must specify a characteristic type where the characteristic entity is set to **Policy**. This field is mandatory.
- **Status To Skip Process** - Used when you do not want to create the customer contact when the policy is transition to a particular status. You can specify comma-separated values for this parameter.

Algorithms Used in C1-PolicyPlan

The following table lists the algorithms which are attached to the **C1-PolicyPlan** business object:

System Event	Algorithm	Algorithm Type	Description
Audit	C1-PPCONCRE	C1-PPCONCRE	Refer to C1-PPCONCRE on page 229.
Validation	C1-VALPPBO	C1-VALPPBO	Refer to C1-VALPPBO on page 229.

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C1-PPCONCRE

This algorithm is invoked when you create or edit a policy plan from the user interface or through an inbound message. It creates a contract in either of the following ways:

- If a price item is associated with the policy plan, it creates a contract using the contract type which is associated with the price item.
- If a pricing rule type is associated with the policy plan and the pricing rule type contains one or more price items, it creates a contract using a distinct contract type which is associated with each price item.

  Let us assume that PRT1 is associated with the policy plan and it contains three price items - P1, P2, and P3. Now, if the P1 is associated with the CT1 contract type, P2 is associated with the CT2 contract type, and P3 is associated with the CT3 contract type, the system will create three contracts - C1 using CT1, C2 using CT2, and C3 using CT3. However, if the P1 and P3 are associated with the CT1 contract type and P2 is associated with the CT2 contract type, the system will create two distinct contracts - C1 using CT1 and C2 using CT2.

  If multiple pricing rule types are associated with the policy plan and each pricing rule type contains multiple price items, it creates a contract using a distinct contract type which is associated with each price item on each pricing rule type.

If a policy plan belongs to a policy of the parent customer (where a bill group is not associated), the system will create one contract using each contract type on each account of the parent customer and bill groups. If a policy plan belongs to a policy of a bill group (where the parent customer is the policy holder), the system will create one contract using each contract type on each account of the parent customer and the bill group.

The status of each contract is set to **Active**. The contract start date is set to the start date of the respective plan. If the same contract type is associated with the same or different price items on the same or different pricing rule types of different plans, the contract start date is set to the start date of the earliest plan. The default rate schedule specified on the respective contract type is added to the contract in the rate information and its effective date is set to the contract start date.

Note:

The system creates a contract using a contract type for an account when the division to which the account and contract type belongs is same.

If a contract of a contract type is already present on the account, the system will not create a new contract. Instead, it will update the start date of the existing contract, if required.

If the same contract type is associated with the same or different price items on the same or different pricing rule types of different plans on different policies, the contract start date is set to the start date of the earliest plan across policies.

C1-VALPPBO

This algorithm validates a policy plan. It checks the following:

- Whether the policy plan end date is not earlier than the policy plan start date.
- Whether the policy plan start date is not earlier than the policy start date or later than policy end date.
- Whether the policy plan end date is not earlier than the policy start date or later than policy end date.
- Whether the price item or at least one pricing rule type is associated with the policy plan.

Algorithms Used in C1-Membership

The following table lists the algorithms which are attached to the **C1-Membership** business object:

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System Event	Algorithm	Algorithm Type	Description
Audit	C1-FIAUDEV	C1-FIAUDEV	Refer to C1-FIAUDEV on page 96.
Post-Processing	C1-RTAREAMEM	C1-RTAREAMEM	Refer to C1-RTAREAMEM on page 231
Post-Processing	C1-MEMRLSUBT	C1-MEMRLSUBT	Refer to C1-MEMRLSUBT on page 232
Post-Processing	C1-MPCONCREA	C1-MPCONCREA	Refer to C1-MPCONCREA on page 233
Pre-Processing	C1-MEMSTPRE	C1-MEMSTPRE	Refer to C1-MEMSTPRE on page 233.
Validation	C1-VALMEMBO	C1-VALMEMBO	Refer to C1-VALMEMBO on page 233.

The following table lists the algorithms which are used in the lifecycle of the **C1-Membership** business object:

Status	System Event	Algorithm	Algorithm Type	Description
Active	-	-	-	-
Inactive	Enter	C1-MEMINACT	C1-MEMINACT	Refer to C1-MEMINACT on page 234.
Terminated	-	-	-	-

C1-FIAUDEV

If this algorithm is attached to the **Audit** system event of the **Group Membership** (**C1-Membership**), **Individual Membership** (**C1-IndMembership**), **Benefit** (**C1-Benefits**), and **Person** (**C1_PERSON_BO**) business objects, it is invoked whenever you define, edit, or delete the respective entity. It checks whether an active audit event type exists for the entity business object. If so, it considers the active audit event type and creates the audit event using the respective audit event type. The system creates the audit event whenever a group membership is added to a policy plan, an individual membership is added to a health plan, member person is added to a group or individual membership, and a membership benefit is added for a group or individual membership. It also creates the audit event whenever the group or individual membership, member person, and membership benefit details are updated. However, note that the audit events are created in the update scenario when the element listed for auditing in the age-based, tier-based, or benefit pricing rule type is updated. The system considers only those pricing rule types whose pricing rules are effective during the respective entity (i.e. group or individual membership, member person, or membership benefit whichever is updated) date range.

It creates one or more audit events in the **Pending** status. The entity type and entity ID for which an audit event is created are added corresponding to the audit event in the **C1_AUDIT_EVENT** table. In addition, the effective date is stamped corresponding to the audit event in the **C1_AUDIT_EVENT** table.

Note:

The system creates an audit event whenever the group or individual membership start and end dates and member person's start and end dates are changed in the system irrespective of whether these fields are listed for auditing or not in the age-based or tier-based pricing rule types.

Before creating an audit event, the system checks whether an audit event for the entity ID with the same effective date already exists in the **Pending** or **Error** status for the respective action. If so, the system does not create a new audit event for the entity. Instead, the system adds a new log entry in the existing audit event.

For each audit event, this algorithm derives the group or individual memberships on the policy or health plan, respectively, which is impacted and the pricing rule types whose pricing rules are defined on the respective policy or health plan. A repricing entity detail record is then created for each membership, pricing rule type, and effective date combination in the **CI_REPRC_ENTITY_DTL** table. The status of the repricing entity detail record is set to **Pending**. Once the repricing entity detail records are created successfully, the status of the audit event is changed to **Complete**.

It contains the following parameters:

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- **Audit Event Business Object** - Used to specify the business object using which you want to create the audit event.
- **Audit Event Pending Status** - Used to specify the status in which you want to create the audit event. This parameter is also used for determining whether an audit event for the entity ID already exists in the system.
- **Audit Event Error Status** - Used to specify the status in which an audit event is transitioned when an error occurs while processing the audit event. This parameter is used for determining whether an audit event for the entity ID already exists in the system.

All the above parameters are mandatory.

Related Topics

For more information on...	See...
How the audit events are created and processed for an age based or tier based pricing rule	Age Based and Tier Based Pricing Rules Audit Process on page 3467
How the audit events are created and processed for a membership	Membership Audit Process on page 3468
How the audit events are created and processed for a person	Person Audit Process on page 3472
How the audit events are created and processed for a membership benefit	Membership Benefit Audit Process on page 3474

C1-RTAREAMEM

This algorithm derives the geographic rating area for a membership using the **Address Source** and **Address Type** characteristic types. It supports two address sources named **Policy Holder** and **Main Subscriber** and three address types named **Person Mailing**, **Person Seasonal**, and **Account Override**.

On adding a membership to a policy plan, this algorithm derives the characteristic types from the **Address Source Characteristic Type** and **Address Type Characteristic Type** attributes of a geographic rating area preference. This algorithm considers the geographic rating area preference which is specified in the **Rating Area Field Mapping for Group** option type of the **C1-ASOBLLNG** feature configuration. Then, it searches for these characteristics on the following entities in the specified sequence:

1. Policy Plan
2. State where the Policy Plan is Issued
3. Policy
4. State where the Policy is Issued

If these characteristics are not defined for any of the above listed entities, this algorithm derives the default address source and address type from the geographic rating area preference. If the address source is set to **Policy Holder**, this algorithm fetches the value from the **Parent Customer Policy Person Role** option type of the **C1-ASOBLLNG** feature configuration. It then derives the person who is associated with the policy using the parent customer policy person role. Once the address source and address type are derived, this algorithm fetches the state and zip code from the address type of the address source. For example, if the address source is set to **Policy Holder** and address type is set to **Person Mailing**, this algorithm fetches the state and zip code from the policy holder's mailing address. Once the state and zip code are fetched from the address, this algorithm checks whether the zip code is a 9-digit code. If not, it appends zeros to make it a 9-digit zip code. It then derives the value of the **Use Plan Details** attribute from the geographic rating area preference. If the attribute is set to**Y**, this algorithm derives a geographic rating area for the state, zip code, policy number, plan number, and source system combination. However, if the attribute is set to**N**, this algorithm derives a geographic rating area for the state and zip code combination. If the geographic rating area is not derived for the specified combination, this algorithm derives the default geographic rating area from the geographic rating area preference. Once the geographic rating area is derived, this algorithm stores the geographic rating area for the membership. The characteristic type specified in the **Geographic Rating Area Characteristic Type** attribute of the

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geographic rating area preference is used to store geographic rating area for the membership. The effective date of the characteristic is set to effective date of the address.

C1-MEMRLSUBT

While adding a membership to a policy plan or while adding or inactivating a member person in a membership, this algorithm derives the member relationship for each member person of the membership from a member relationship structure. It considers the member relationship structure which is defined as a characteristic for the policy plan. While deriving the member relationship structure of the policy plan, it considers the characteristic which is defined using a characteristic type specified in the **Member Relationship Structure Characteristic Type** attribute of a member relationship and subscription tier preference. It considers the member relationship and subscription tier preference which is specified in the **Relation Structure Code Field Mapping** option type of the **C1-ASOBLLNG** feature configuration.

The member relationship structure helps to determine how each member person is related to the main subscriber of the membership. A member relationship is derived for a member person depending on the following:

- Whether the member person is a self, spouse, or dependent
- Number of spouses, dependents, and young adults in the membership

While determining the member relationship for a member person, this algorithm derives the following characteristic types from the respective attributes of the member relationship and subscription tier preference:

- Age Calculation Date Basis
- Max Age Limit for Max Dependent Count
- Max Number of Dependents Order Priority
- Maximum Number of Dependents
- Member Relationship Derivation Date
- New Born Gift Days
- New Born Gift Days Applicability
- Young Adult Max Age Limit
- Young Adult Max Age Limit Applicability

It then derives these characteristics from the policy plan. Based on these characteristics defined for the policy plan, it derives the member relationship for each member person from the member relationship structure. If the **Member Relationship Derivation Date** characteristic type is set to **Enrollment Date**, this algorithm derives the member relationship for each member person of the membership in order of the member start date. However, if the **Member Relationship Derivation Date** characteristic type is set to **Date of Birth**, this algorithm derives the member relationship for each member person of the membership in order of the date of birth.

Once the member relationship is derived for a member person, this algorithm stores the member relationship for the member person. The characteristic type specified in the **Member Relationship Characteristic Type** attribute of the member relationship and subscription tier preference is used to store member relationship for the member person. On adding a membership to a policy plan or on adding a member person to a membership, the effective date of the member relationship characteristic is set to the member person's start date. If a new born is added to the membership, the effective date of the new born's member relationship characteristic is calculated considering the gift days if applicable.

If a member person is end dated, this algorithm derives the member relationship of all other member persons once again. If the member relationship for a member person is different, it creates a new characteristic to store the member relationship for the member person. The effective date of the new characteristic is set to the member person's end date + 1. For example, if the end date of a member person is set to 06-30-2021, then the effective date of the new characteristic for the remaining member persons is set to 07-01-2021. Similarly, if a member person is inactivated, this algorithm derives the member relationship of all other member persons once again. In this case, if the member relationship for a member person is different, it updates the existing member relationship characteristic of the member person and does not create a new member relationship characteristic for the member person.

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C1-MPCONCREA

This algorithm is invoked when the following conditions are met:

- A member person who is financially responsible for the membership is added to the membership
- One or more accounts already exist for the member person in the system

If the above conditions are met, this algorithm derives the membership in which the member person is added. It then derives the policy plan to which the membership belongs. It creates contracts for each account of the member person in either of the following ways:

- If a price item is associated with the policy plan, it creates a contract using the contract type which is associated with the price item.
- If a pricing rule type is associated with the policy plan and the pricing rule type contains one or more price items, it creates a contract using a distinct contract type which is associated with each price item.

  Let us assume that PRT1 is associated with the policy plan and it contains three price items - PI1, PI2, and PI3. Now, if the PI1 is associated with the CT1 contract type, PI2 is associated with the CT2 contract type, and PI3 is associated with the CT3 contract type, this algorithm will create three contracts - C1 using CT1, C2 using CT2, and C3 using CT3. However, if the PI1 and PI3 are associated with the CT1 contract type and PI2 is associated with the CT2 contract type, this algorithm will create two distinct contracts - C1 using CT1 and C2 using CT2.

  If multiple pricing rule types are associated with the policy plan and each pricing rule type contains multiple price items, it creates a contract using a distinct contract type which is associated with each price item on each pricing rule type.

The status of each contract is set to **Active**. The contract start date is set to the start date of the respective plan. The default rate schedule specified on the respective contract type is added to the contract in the rate information and its effective date is set to the contract start date.

Note:

The system creates a contract using a contract type for an account when the division to which the account and contract type belongs is same.

If a contract of a contract type is already present on the account, the system will not create a new contract. Instead, it will update the start date of the existing contract, if required.

C1-MEMSTPRE

Once the status of the main subscriber is changed to **Inactive**, this algorithm changes the status of the membership to the value specified in the **Membership Inactive Status** option type of the **C1-ASOBLLNG** feature configuration. In addition, it does not allow you to add a member person in the **Inactive** status to a membership.

C1-VALMEMBO

This algorithm validates a membership. It checks the following:

- Whether the membership end date is not earlier than the membership start date.
- Whether the membership start date is not earlier than the policy plan start date or later than policy plan end date.
- Whether the membership end date is not earlier than the policy plan start date or later than policy plan end date.
- Whether the policy plan for which you want to define the membership is specified.
- Whether the person who is the main subscriber is added to the membership.
- Whether the relationship type is specified while adding a person to the membership.

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C1-MEMINACT

This algorithm changes the status of the member person to the value specified in the **Membership Person Inactive Status** option type of the **C1-ASOBLLNG** feature configuration. It also does the following:

- Cancels the billable charges which are created for the membership
- Cancels the corresponding bill segments (if any)

If an audit event exists for the membership which is inactivated, the **BO_STATUS_CD** column corresponding to the record in the **C1_AUDIT_EVENT**, **C1_AUDIT_EVENT_LOG**, and **CI_PRCE_CALC** tables is set to **INVALID**. If a repricing entity detail record exists for the membership in the **PENDING** or **ERROR** status, then the **BO_STATUS_CD** column corresponding to the record in the **CI_REPRC_ENTITY_DTL** table is set to **COMPLETE**. If a repricing request exists for the membership in the **PENDING** or **ERROR** status, then the **BO_STATUS_CD** column corresponding to the record in the **CI_REPRC_REQ_DTL** table is set to **COMPLETE**.

Late Setup Notification

Oracle Revenue Management and Billing enables you to create a To Do notification when the details to include a member person in a group or individual membership is received in ORMB beyond the late setup threshold days from the member person start date. This notification can help the billing analyst to take appropriate actions, such as giving premium waiver to the member person if required.

To enable this feature, you need to set the following option types in the **C1-ASOBLLNG** feature configuration:

- **Monitor Late Setup** - Used to indicate whether you want to enable the late setup notification feature. The valid values are - **Y** and **N**. By default, the value is set to **N**.
- **Late Setup Threshold in Days** - Used to indicate the number of threshold days for late setup notification. This option type is required when the **Monitor Late Setup** option type is set to **Y**. The value must be greater than zero.

For example, if the system receives the information to add a member person with the start date as **01-15-2021** to an individual membership on **02-15-2021** and the late setup threshold days in the **C1-ASOBLLNG** feature configuration is set to **15**. In this case, the number of days between the member person start date and member person creation date is greater than late setup threshold days, and therefore a To Do is created using the To Do type which is specified in the **C1-LATESET** algorithm attached to the group or individual membership business object, respectively.

To implement this business requirement, the system stores the member person creation date (which was not done in the previous releases) while adding a member person to a group or individual membership. A new batch named **C1-LSUB** is introduced in this release. It derives the creation date for all member persons in the existing group and individual memberships and stamps it against the corresponding record in the **CRE_DTTM** column of the **CI_MEMBERSHIP_PER** table. This batch must be executed only once after upgrading to Oracle Revenue Management and Billing Version 3.1.0.0.0. For more information, refer to *Oracle Revenue Management and Billing Version 3.1.0.0.0 Upgrade Guide.*

To Do Creation for Manual Refund/Write Off on Direct Billed Group Membership Cancellation

Oracle Revenue Management and Billing facilitates you with the following on cancelling a direct billed group membership:

- Automatically cancel any refund and/or write off requests which are systematically created through refund/write off instruction via the **Automatic Refund/Write Off** feature.
- Create a To Do for refund and/or write off requests which are manually created for the account via the **Refund/Write Off Request** feature.

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

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- A new algorithm type named **C1-WOCANMCN** is introduced in this release. An algorithm created using the **C1-WOCANMCN** algorithm type is attached to the **Canceled** status in the lifecycle of the **C1-Membership** business object.
- The **C1-RFRQC** and **C1-WORQC** To Do types are newly introduced in this release.

On cancelling a group membership, the system checks whether the billing arrangement characteristic is defined on the group membership. The system considers the characteristic type which is specified in the **Billing Arrangement** option type of the **C1-ASOBLLNG** feature configuration. If the billing arrangement characteristic is defined on the group membership, the system checks whether the characteristic value is set to **DRCT** (i.e., Direct Billing). If so, the system derives the financially responsible person's account from the system. However, if the billing arrangement characteristic is not defined on the group membership or if its characteristic value is not set to **DRCT** (i.e., Direct Billing), the system will skip the group membership and will take no actions against it.

Once the account is derived for a direct billed group membership, the system checks whether there is any refund/write off request created for the account. If so, the system checks whether the refund/write off request is systematically created through refund/write off instruction via the **Automatic Refund/Write Off** feature. If so, the system automatically cancels the refund/write off request of the account. However, if the refund/write off request is not systematically created through refund/write off instruction, the system creates a To Do using the respective To Do type specified in the **C1-WOCANMCN** algorithm. You can then refer this To Do and manually cancel such refund/write off request of the account.

Policy (Used for Searching)

The **Policy** screen allows you to search for a policy using various search criteria. It also allows you to define a policy. It contains the following zone:

- Search Policy on page 235

Through this screen, you can navigate to the following screen:

- Policy (Used for Viewing) on page 247

Search Policy

The **Search Policy** zone allows you to search for a policy using various search criteria. It contains the following two sections:

- **Search Criteria** - The **Search Criteria** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Search By	Used to indicate whether you want to search for a policy using the policy or person details. The valid values are: • Policy Date/Policy Type/Status • Source System/Policy Number/Description • Person Name/Person Identifier • Policy Characteristics **Note:** By default, the **Policy Date/Policy Type/Status** option is selected.	Yes
Policy Type	Used to search policies which are created using a particular policy type.	No

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Field Name	Field Description	Mandatory (Yes or No)
	Note: This field appears when the **Policy Date/Policy Type/Status** option is selected from the **Search By** list.	
Start Date	Used to search policies which are effective from a particular date. **Note:** This field appears when the **Policy Date/Policy Type/Status** option is selected from the **Search By** list.	No
Status	Used to search policies with a particular status. The valid values are: • In Force/Active • Canceled • Pending Cancellation • Pending • Pending Reinstatement • Pending Termination • Post Runout • Reinstated • Runout • Terminated **Note:** This field appears when the **Policy Date/Policy Type/Status** option is selected from the **Search By** list.	No
End Date	Used to search policies which are effective till a particular date. **Note:** This field appears when the **Policy Date/Policy Type/Status** option is selected from the **Search By** list.	No
Source System	Used to search policies which originated from a particular external system. **Note:** This field appears when the **Source System/Policy Number/ Description** option is selected from the **Search By** list.	No
Policy Number	Used to search a policy with a particular policy number. **Note:** This field appears when the **Source System/Policy Number/ Description** option is selected from the **Search By** list.	No
Description	Used to search policies with a particular description. **Note:** This field appears when the **Source System/Policy Number/ Description** option is selected from the **Search By** list.	No
Person Name	Used to search policies to which a particular person is associated. **Note:** This field appears when the **Person Name/Person Identifier** option is selected from the **Search By** list.	No
Person Identifier Type	Used to indicate the person identifier type.	Yes (Conditional)

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Field Name	Field Description	Mandatory (Yes or No)
	Note: This field appears when the **Person Name/Person Identifier** option is selected from the **Search By** list.	**Note:** If you specify the person identifier as a search criteria, you have to select the person identifier type.
Person Identifier	Used to search policies to which a person is associated.	Yes (Conditional)
	Note: This field appears when the **Person Name/Person Identifier** option is selected from the **Search By** list.	**Note:** If you specify the person identifier type as a search criteria, you have to specify the person identifier.
Characteristic Type	Used to search policies for which a particular characteristic type is defined.	Yes (Conditional)
	Note: This field appears when the **Policy Characteristics** option is selected from the **Search By** list. The list includes only those characteristic types where the characteristic entity is set to **Policy**.	**Note:** This field is required when you are searching for a policy using a characteristic.
Characteristic Value	Used to search policies with a particular characteristic value.	Yes (Conditional)
	Note: This field appears when the characteristic type is selected. If you select a predefined characteristic type, the **Search** (🔍) icon appears corresponding to the **Characteristic Value** field. On clicking the **Search** icon, the **Predefined Characteristic Search** window appears. On specifying the value for a predefined characteristic type, the description of the characteristic value appears corresponding to the **Characteristic Value** field.	**Note:** This field is required when you are searching for a policy using a characteristic.

Note: You must specify at least one search criterion while searching for a policy.

- **Search Results** - On clicking the **Search** button, the search results appear based on the specified search criteria. The **Search Results** section contains the following columns:

Column Name	Column Description
Policy Number	Displays the policy number.
Policy Information	Displays additional information about the policy.

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<table>
<tr><th>Column Name</th><th>Column Description</th></tr>
<tr><td></td><td>Note: It has a link. On clicking the link, the Policy screen appears where you can view the details of the respective policy.</td></tr>
<tr><td>Source System</td><td>Indicates the external system from where the policy is originated.</td></tr>
<tr><td>Description</td><td>Displays the description of the policy.</td></tr>
<tr><td>Start Date</td><td>Displays the date from when the policy is effective.</td></tr>
<tr><td>End Date</td><td>Displays the date till when the policy is effective.</td></tr>
<tr><td>Status</td><td>Indicates the status of the policy. If the policy is created using the C1-POLICY business object, the valid values are:
Pending
In Force/Active
Pending Cancellation
Canceled
Pending Reinstatement
Reinstated
Pending Termination
Terminated
However, if the policy is created using the C1-ASOPolicy business object, the valid values are:
Pending
In Force/Active
Runout
Post Runout</td></tr>
<tr><td>Main Customer</td><td>This column displays different data depending on whether you search for a policy using the policy or person details. The following table describes this column:<table>
<tr><th>If you search for a policy using...</th><th>Then...</th></tr>
<tr><td>The Policy Date/Policy Type/ Status, Source System/Policy Number/ Description, or Policy Characteristics option</td><td>The Main Customer column displays the name of the person who is the main customer of the policy. In addition, this column has a context menu which helps in navigating to other screens in the application.
Note: It has a link. On clicking the link, the Person screen appears where you can view the details of the respective person.</td></tr>
<tr><td>The Person Name/Person Identifier option</td><td>The Main Customer column indicates whether the person is the main customer of the policy. The valid values are:
Yes
No</td></tr>
</table></td></tr>
<tr><td>Person Information</td><td>Indicates the person who is associated with the policy. In addition, this column has a context menu which helps in navigating to other screens in the application.</td></tr>
</table>

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Column Name	Column Description
	Note: It has a link. On clicking the link, the **Person** screen appears where you can view the details of the respective person. This column appears when the **Person Name/Person Identifier** option is selected from the **Search By** list.
Policy Person Role	Indicates the role using which the person is associated with the policy.
	Note: This column appears when the **Person Name/Person Identifier** option is selected from the **Search By** list.

Note: Pagination is used to display limited number of records in the **Search Results** section. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

Related Topics

For more information on...	See...
How to search for a policy	Searching for a Policy on page 239
How to define a policy	Defining a Policy on page 240
How to view the details of a policy	Viewing the Policy Details on page 240

Searching for a Policy

Prerequisites

To search for a policy, you should have:

- Policy types and person identifier types defined in the application
- Values defined for the **C1-SourceSystemLookup** extendable lookup
- Characteristic types defined in the application (where the characteristic entity is set to **Policy**)

Procedure

To search for a policy:

1. Click the **Menu** link in the **Application** toolbar.
   A list appears.
2. From the **Main** menu, select **Customer Management** and then click **Policy**.
   A sub-menu appears.
3. Click the **Search** option from the **Policy** sub-menu.
   The **Policy** screen appears.
4. Enter the search criteria in the **Search Policy** zone.

Note: ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.

5. Click **Search**.

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A list of policies that meet the search criteria appears in the **Search Results** section.

Related Topics

For more information on...	See...
Policy screen	Policy (Used for Viewing) on page 247
Search Policy zone	Search Policy on page 235

Viewing the Policy Details

Procedure

To view the details of a policy:

1. Search for the policy in the **Policy** screen.
2. In the **Search Results** section, click the link in the **Policy Information** column corresponding to the policy *w*hose details you want to view.
   The **Policy** screen appears.
3. Ensure that the **Main** tab is selected.
4. View the details of the policy in the **Policy** zone.

Related Topics

For more information on...	See...
How to search for a policy	Searching for a Policy on page 239
Policy screen	Policy (Used for Viewing) on page 247
Policy zone	Policy on page 247

Defining a Policy

Oracle Revenue Management and Billing enables you to define a policy for the fully-insured and self-funded health insurance business. You can define a fully-insured group policy using a policy type where the policy category is set to **Fully-Insured Group** or **Fully-Insured Individual**. However, you can define a self-funded policy using a policy type where the policy category is set to **Self-Funded**.

Note: At present, the **Fully-Insured Individual** policy category is not supported in the system.

Prerequisites

To define a policy, you should have:

- Policy types defined in the application.
- Values defined for the **C1-SourceSystemLookup** extendable lookup.

  Note: This prerequisite is applicable only when you want to define a fully-insured group policy.
- Values defined for the **RUNOUT_ADM_OPT_FLG** lookup field.

  Note: This prerequisite is applicable when you want to define a self-funded policy.

Procedure

To define a policy:

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1. Click the **Menu** link in the **Application** toolbar.
   A list appears.
2. From the **Main** menu, select **Customer Management** and then click **Policy**.
   A sub-menu appears.
3. Click the **Add** option from the **Policy** sub-menu.

   The **Select Policy Type** screen appears. It contains the following field:

Field Name	Field Description	Mandatory (Yes or No)
Policy Type	Used to indicate the policy type using which you want to create a policy. **Note:** If you want to create a fully-insured group policy, you must select a policy type where the policy category is set to **Fully-Insured Group** or **Fully-Insured Individual**. However, if you want to create a self-funded policy, you must select a policy type where the policy category is set to **Self-Funded**.	Yes

Tip: Alternatively, you can access this screen by clicking the **Add** button in the **Page Title** area of the **Policy** screen.

4. Select the required policy type from the respective field.
5. Click **OK**.

   The **Policy** screen appears. It contains the following sections:

   - **Main** - Used to specify the basic details about the policy.
   - **Persons** - Used to associate persons with the policy.
   - **Characteristics** - Used to define the characteristics for the policy.

   The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Policy Type	Indicates the policy type using which you are defining the policy.	Not applicable
Policy Number	Used to specify the policy number.	Yes
Description	Used to specify the description for the policy.	Yes
Source System	Used to indicate the external system from where the policy is originated. **Note:** This field appears when you are defining a policy using a policy type where the policy category is set to **Fully-Insured Group** or **Fully-Insured Individual**.	Yes
Start Date	Used to specify the date from when the policy is effective. **Note:** The policy start date cannot be later than the policy end date.	Yes
End Date	Used to specify the date till when the policy is effective.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The policy end date cannot be earlier than the policy start date.	
Runout End Date	Used to specify the date when the runout period of the self-funded policy ends. **Note:** The runout end date cannot be earlier than or equal to the policy end date. This field appears when you are defining a policy using a policy type where the policy category is set to **Self-Funded**.	No
Runout Administration Fees	Used to indicate whether the administration fees must be charged when the claim transaction for the self-funded policy is processed in the runout period. The valid values are: • None • Percentage of Claim **Note:** At present, this field is used only for the informational purposes and is not considered during the billable charge creation for the claim transactions which are received in the runout period of the policy. This field appears when you are defining a policy using a policy type where the policy category is set to **Self-Funded**.	No
Advance Level Funding Eligibility	Indicates whether the self-funded policy is eligible for the advance billing feature of level funding. **Note:** This is a read-only field. By default, the value is set to **No**. You can edit the advance level funding eligibility only through a health care inbound message. This field appears when you are defining a policy using a policy type where the policy category is set to **Self-Funded**.	Not applicable
Advance Deposit Applicability	Used to indicate whether the advance deposit is applicable for the policy.	No

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Field Name	Field Description	Mandatory (Yes or No)
	Note: This field is required only when the advance deposit level of the respective policy holder (i.e., parent customer) is set to **POLI**. However, this field is not mandatory. This field appears only when you create a policy using a policy type where the policy category is set to **Fully-Insured Group**.	
Advance Deposit Amount	Used to specify the advance deposit amount that will be parked at the policy level. **Note:** You must specify a positive value in this field. This field appears only when you create a policy using a policy type where the policy category is set to **Fully-Insured Group**.	Yes (Conditional) **Note:** This field is required when the **Advance Deposit Applicability** option is selected.
Advance Deposit Grace Days	Used to specify the grace days. The system then uses the grace days to derive the grace period within which the advance deposit should be received from the group customer for the policy. While calculating the grace period, the system considers the policy start date as the grace start date. Once the grace start date is derived, the system calculates the grace end date (i.e., grace start date + grace days). For example, if a parent customer is the policy holder of the P1 policy (01-Jan-2022 to 31-Dec-2022) and advance deposit grace days is set to 6 days, then the system considers 01-Jan-2022 as the grace start date and sets the grace end date to 07-Jan-2022. **Note:** You must specify an integer value in this field. This field appears only when you create a policy using a policy type where the policy category is set to **Fully-Insured Group**.	Yes (Conditional) **Note:** This field is required when the **Advance Deposit Applicability** option is selected.
Advance Deposit Account	Used to indicate the account of the parent customer where the advance deposit is parked for the policy.	Yes (Conditional)

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Field Name	Field Description	Mandatory (Yes or No)
	Note: This field appears only when you create a policy using a policy type where the policy category is set to **Fully-Insured Group**. You must specify an account with the account relationship type that is specified in the **Advance Deposit Account Relationship Type** attribute of the delinquency process preference. The system considers the delinquency process preference which is specified in the **Delinquency Process Field Mapping** option type of the **DELINPROC** feature configuration. For more information about the feature configuration, see Setting the DELINPROC Feature Configuration on page 4442. The **Search** (🔍) icon appears corresponding to the **Advance Deposit Account** field. On clicking the **Search** icon, the **Account Search** window appears.	**Note:** This field is required when the **Advance Deposit Applicability** option is selected.

6. Enter the required details in the **Main** section.
7. Associate the required persons with the policy.

> **Note:** While defining a policy, you must associate a person who is the main customer of the policy.

8. Define the characteristics for the policy, if required.
9. Click **Save**.
   The policy is defined and its status is set to **Pending**.

Related Topics

For more information on...	See...
Policy screen	Policy (Used for Viewing) on page 247
How to associate a person with a policy	Associating a Person with a Policy on page 244
How to define a characteristic for a policy	Defining a Characteristic for a Policy on page 246

Associating a Person with a Policy

Prerequisites

To associate a person with a policy, you should have:

- Required persons defined in the application
- Required policy person roles defined in the application

Procedure

To associate a person with a policy:

1. Ensure that the **Persons** section is expanded when you are defining or editing a policy.

   The **Persons** section contains the following fields in a grid:

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Field Name	Field Description	Mandatory (Yes or No)
Person	Used to indicate the person that you want to associate with the policy. **Note:** The **Search** (🔍) icon appears corresponding to this field. On clicking the **Search** icon, the **Person Search** window appears. On specifying the person ID, the person name appears corresponding to the **Person** field.	Yes
Sequence	Used to specify the sequence number for the associated person.	Yes
Policy Person Role	Used to indicate the role of a person in the policy.	Yes
Main Customer	Used to indicate whether the person is the main customer of the policy. **Note:** At a time, only one person can be the main customer of the policy.	Yes (Conditional) **Note:** You must select this option while associating a person who is the main customer of the policy.
Start Date	Used to specify the date from when the person is associated with the policy. **Note:** The start date cannot be later than the end date. The start date cannot be earlier than the policy start date and later than the policy end date.	Yes
End Date	Used to specify the date till when the person is associated with the policy. **Note:** The end date cannot be earlier than the start date. The end date cannot be earlier than the policy start date and later than the policy end date. This validation is done when the policy is transition to the status which is not specified in the **Skip Status for Policy Person End Date Validation** parameter of the **C1-POLBOVAL** algorithm. For example, if you set the **Skip Status for Policy Person End Date Validation** parameter of the **C1-POLBOVAL** algorithm to **TERMINATED**, the system will not perform this validation when the status of the policy is changed to **Terminated**.	No

2. Enter the required details in the **Persons** section.

Note: While associating the persons with a policy, you must always ensure that one person is the main customer of the policy.

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3. If you want to associate more than one person with the policy, click the **Add** (+) icon and then repeat step 2.

   Note: However, if you want to dissociate a person from the policy, click the **Delete** (🗑) icon corresponding to the person.

4. Click **Save**.
   The persons are associated with the policy.

Related Topics

For more information on...	See...
How to define a policy	Defining a Policy on page 240
How to edit a policy	Editing a Policy on page 258

Defining a Characteristic for a Policy

Prerequisites

To define a characteristic for a policy, you should have:

- Characteristic types defined in the application (where the characteristic entity is set to **Policy**)

Procedure

To define a characteristic for a policy:

1. Ensure that the **Characteristics** section is expanded when you are defining or editing a policy.

   The **Characteristics** section contains the following fields in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Effective Date	Used to specify the date from when the characteristic is effective for the policy. **Note:** The effective date cannot be earlier than the policy start date and later than the policy end date.	Yes (Conditional) **Note:** This field is required when you are defining a characteristic for the policy.
Characteristic Type	Used to indicate the characteristic type. **Note:** The list includes only those characteristic types where the characteristic entity is set to **Policy**.	Yes (Conditional) **Note:** This field is required when you are defining a characteristic for the policy.
Characteristic Value	Used to specify the value for the characteristic type. **Note:** If you select a predefined characteristic type, the **Search** (🔍) icon appears corresponding to the **Characteristic Value** field. On clicking the **Search** icon, the **Predefined Characteristic Search** window appears. On specifying the value for a predefined characteristic type, the description of the characteristic value appears corresponding to the **Characteristic Value** field.	Yes (Conditional) **Note:** This field is required when you are defining a characteristic for the policy.

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2. Enter the required details in the **Characteristics** section.
3. If you want to define more than one characteristic for the policy, click the **Add** (+) icon and then *r*epeat step 2.

> **Note:** However, if you want to remove a characteristic from the policy, click the **Delete** (🗑) icon corresponding to the characteristic.

4. Click **Save**.
   The characteristics are defined for the policy.

Related Topics

For more information on...	See...
How to define a policy	Defining a Policy on page 240
How to edit a policy	Editing a Policy on page 258

Policy (Used for Viewing)

The **Policy** screen allows you to:

- View the details of a fully-insured group or self-funded policy
- Edit the details of a fully-insured group or self-funded policy
- Activate a fully-insured group or self-funded policy
- Add or edit plans in a fully-insured group policy
- Add memberships to a fully-insured group policy plan
- Initiate the termination process for a fully-insured group policy
- Terminate a fully-insured group policy
- Initiate the cancellation process for a fully-insured group policy
- Cancel a fully-insured group policy
- Initiate the reinstatement process for a fully-insured group policy
- Reinstate a fully-insured group policy
- View the log of a fully-insured group or self-funded policy
- Add a log entry for a fully-insured group or self-funded policy

It consists of the following tabs:

- Policy - Main on page 247
- Policy - Plan on page 254
- Policy - Log on page 257

Policy - Main

The **Main** tab displays information about the policy. It contains the following zones:

- Policy on page 247
- Policy Characteristics on page 254

Policy

The **Policy** zone displays the details of the fully-insured group or self-funded policy. It contains the following sections:

- **Main** - Displays basic information about the policy. It contains the following fields:

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Field Name	Field Description
Base Policy Information	Displays information about the base policy. **Note:** This field appears when you are viewing the details of a renewed policy which is created using a policy type where the policy category is set to **Self-Funded**.
Policy Information	Displays information about the policy.
Policy Type	Indicates the policy type using which the policy is created. **Note:** It has a link. On clicking the link, the **Policy Type** screen appears where you can view the details of the respective policy type.
Status	Indicates the status of the policy. If the policy is created using the **C1-POLICY** business object, the valid values are: • Pending • Activate • In Force/Active • Pending Termination • Terminated • Pending Reinstatement • Reinstated • Renewed • Pending Cancellation • Canceled However, if the policy is created using the **C1-ASOPolicy** business object, the valid values are: • Pending • In Force/Active • Runout • Post Runout
Status Reason	Indicates the reason why the policy is terminated. **Note:** It has a link. On clicking the link, the **Status Reason** screen appears where you can view the details of the respective termination reason. This field appears when you are viewing the details of a terminated or reinstated policy which is created using a policy type where the policy category is set to **Fully-Insured Group**.
Policy Number	Displays the policy number.
Description	Displays the description of the policy. **Note:** This field appears when you are viewing the details of a policy where the policy category is set to **Self-Funded**.
Source System	Indicates the external system from where the policy is originated.
Start Date	Displays the date from when the policy is effective.

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<table>
<tr><th>Field Name</th><th>Field Description</th></tr>
<tr><td>End Date</td><td>Displays the date till when the policy is effective.</td></tr>
<tr><td>Renewal Date</td><td>Displays the date when the policy is renewed.

Note: This field appears when you are viewing the details of a policy which is renewed.</td></tr>
<tr><td>Paid Through Date</td><td>Indicates the term end date of the last fully or partially paid term. The system considers the term to be fully paid when the threshold limit is met.

Note:
This field appears when the following conditions are met:
• When you are viewing the details of a policy which is created using a policy type where the policy category is set to Fully-Insured Group.
• When the paid through date is calculated at the policy level.

The paid through date is calculated while freezing or canceling a payment or adjustment depending on whether the required algorithm is attached to the respective system event:
<table>
<tr><th>Entity</th><th>System Event</th><th>Algorithm</th></tr>
<tr><td>Customer Class</td><td>Payment Freeze</td><td>C1-PSPTDCAL</td></tr>
<tr><td>Customer Class</td><td>Payment Cancellation</td><td>C1-PXPTDCAL</td></tr>
<tr><td>Adjustment Type</td><td>Adjustment Freeze</td><td>C1-ADPTDCAL</td></tr>
<tr><td>Adjustment Type</td><td>Adjustment Cancellation</td><td>C1-AXPTDCAL</td></tr>
</table>
The following table indicates when the paid through date is calculated at the policy and/or membership level:
<table>
<tr><th>If the Paid Through Date Calculation Level parameter is set to…</th><th>If the following characteristics are defined for the billable charge or adjustment…</th><th>Then…</th></tr>
<tr><td>P</td><td>C1-POLID</td><td>Paid through date is calculated at the policy level</td></tr>
<tr><td>P</td><td>C1-MPID</td><td>Paid through date is calculated at the policy level</td></tr>
<tr><td>P</td><td>C1-POLID and C1-MPID</td><td>Paid through date is calculated at the policy level</td></tr>
<tr><td>M</td><td>C1-POLID</td><td>Paid through date is not calculated at the membership level</td></tr>
<tr><td>M</td><td>C1-MPID</td><td>Paid through date is calculated at the membership level</td></tr>
<tr><td>M</td><td>C1-POLID and C1-MPID</td><td>Paid through date is calculated at the membership level</td></tr>
<tr><td>P, M</td><td>C1-POLID</td><td>Paid through date is calculated at the policy level</td></tr>
</table>
</td></tr>
</table>

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<table>
<tr><th>Field Name</th><th>Field Description</th></tr>
<tr><td></td><td>
<table>
<tr><th>If the Paid Through Date Calculation Level parameter is set to…</th><th>If the following characteristics are defined for the billable charge or adjustment…</th><th>Then…</th></tr>
<tr><td>P, M</td><td>C1-MPID</td><td>Paid through date is calculated at both the policy and membership levels</td></tr>
<tr><td>P, M</td><td>C1-POLID and C1-MPID</td><td>Paid through date is calculated at both the policy and membership levels</td></tr>
</table>
</td></tr>
<tr><td>Runout End Date</td><td>Displays the date when the runout period of the self-funded policy ends.

Note: This field appears when you are viewing the details of a policy which is created using a policy type where the policy category is set to Self-Funded.</td></tr>
<tr><td>Runout Administration Fees</td><td>Indicates whether the administration fees must be charged when the claim transaction for the self-funded policy is processed in the runout period. The valid values are:
• None
• Percentage of Claim

Note: This field appears when you are viewing the details of a policy which is created using a policy type where the policy category is set to Self-Funded.</td></tr>
<tr><td>Advance Level Funding Eligibility</td><td>Indicates whether the self-funded policy is eligible for advance billing feature of level funding.

Note: This field appears when you are viewing the details of a policy which is created using a policy type where the policy category is set to Self-Funded.</td></tr>
<tr><td>Advance Deposit Applicability</td><td>Indicates whether the advance deposit is applicable for the policy.

Note: This field appears only when the policy is created using a policy type where the policy category is set to Fully-Insured Group.</td></tr>
<tr><td>Advance Deposit Amount</td><td>Displays the advance deposit amount.

Note: This field appears only when the Advance Deposit Applicability option is selected.</td></tr>
<tr><td>Advance Deposit Grace Days</td><td>Displays the grace days used for calculating the advance deposit grace period.

Note: This field appears only when the Advance Deposit Applicability option is selected.</td></tr>
<tr><td>Advance Deposit Account</td><td>Indicates the account of the parent customer where the advance deposit is parked for the policy. In addition, a context menu (⊛) icon appears corresponding to this field which helps in navigating to other screens in the application.</td></tr>
</table>

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Field Name	Field Description
	Note: This field appears only when the **Advance Deposit Applicability** option is selected. It has a link. On clicking the link, the **Account** screen appears where you can view the details of the respective account.

- **Persons** - Lists the persons which are associated with the policy. It contains the following columns:

Column Name	Column Description
Person Information	Indicates the person who is associated with the policy. In addition, this column has a context menu which helps in navigating to other screens in the application. **Note:** It has a link. On clicking the link, the **Person** screen appears where you can view the details of the respective person.
Sequence	Displays the sequence number of the associated person.
Policy Person Role	Indicates the role of the person in the policy.
Main Customer	Indicates whether the person is the main customer of the policy.
Start Date	Displays the date from when the person is associated with the policy.
End Date	Displays the date till when the person is associated with the policy.

- **Record Actions** - This section contains the following buttons:

Button Name	Button Description
Edit	Used to edit the details of the fully-insured group or self-funded policy. **Note:** The **Edit** button appears only when a policy of the respective category is in either of the following status:
Activate	Used to activate the fully-insured group or self-funded policy.

Policy Category	Status
Fully-Insured Group	• In Force/Active • Canceled • Pending Cancellation • Pending • Pending Reinstatement • Pending Termination • Terminated
Self-Funded	• In Force/Active • Pending • Runout

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<table>
<tr><th>Button Name</th><th>Button Description</th></tr>
<tr><td></td><td>Note:
The Activate button appears when a policy of the respective category is in either of the following status:<table><tr><th>Policy Category</th><th>Status</th></tr><tr><td>Fully-Insured Group</td><td>• Pending
• Pending Termination</td></tr><tr><td>Self-Funded</td><td>• Pending</td></tr></table></td></tr>
<tr><td>Initiate Cancellation</td><td>Used to initiate the cancellation process for the fully-insured group policy.
Note: The Initiate Cancellation button appears when the fully-insured group policy is in the In Force/Active status.</td></tr>
<tr><td>Cancel</td><td>Used to cancel the fully-insured group policy.
Note: The Cancel button appears when the fully-insured group policy is in the Pending Cancellation status.</td></tr>
<tr><td>Initiate Termination</td><td>Used to initiate the termination process for the fully-insured group policy.
Note: The Initiate Termination button appears when the fully-insured group policy is in the In Force/Active status.</td></tr>
<tr><td>Terminate</td><td>Used to terminate the fully-insured group policy.
Note: The Terminate button appears when the fully-insured group policy is in the In Force/Active, Pending Reinstatement, or Pending Termination status.</td></tr>
<tr><td>Initiate Reinstatement</td><td>Used to initiate the reinstatement process for the terminated policy.
Note: The Initiate Reinstatement button appears when the fully-insured group policy is in the Terminated status.</td></tr>
<tr><td>Reinstate</td><td>Used to reinstate the terminated policy.
Note: The Reinstate button appears when the fully-insured group policy is in the Pending Reinstatement or Terminated status.</td></tr>
<tr><td>Runout</td><td>Used to transition the self-funded policy to the Runout status.</td></tr>
</table>

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Button Name	Button Description
	Note: The **Runout** button appears when the self-funded policy is in the **In Force/Active** status. You cannot transition a self-funded policy to the **Runout** status when: • The self-funded policy is renewed. • The runout end date is not specified. • The policy end date is earlier than the system date.

- **Record Information** - This section contains the following fields:

Field Name	Field Description
Business Object	Indicates the business object using which the policy is created. In addition, a context menu appears corresponding to this field which helps in navigating to other screens in the application. **Note:** It has a link. On clicking the link, the **Business Object** screen appears where you can view the details of the respective business object.
Status Date/Time	Displays the date and time when the policy status is updated.
Create Date/Time	Displays the date and time when the policy is created.

- **Termination Information** - Displays the termination details of the fully-insured group policy. It appears when the policy is in the **Pending Termination** status. It contains the following fields:

Field Name	Field Description
Terminate Date	Displays the date when you want to terminate the policy.
Terminate Reason	Indicates the reason why the termination process is initiated for the policy. **Note:** It has a link. On clicking the link, the **Status Reason** screen appears where you can view the details of the respective termination reason.

- **Reinstate Information** - Displays the reinstatement details of the terminated policy. It appears when the policy is in the **Pending Reinstatement** status. It contains the following fields:

Field Name	Field Description
Reinstate Reason	Indicates the reason why you want to reinstate the fully-insured group policy. **Note:** It has a link. On clicking the link, the **Status Reason** screen appears where you can view the details of the respective reinstatement reason.

Related Topics

For more information on...	See...
How to edit a policy	Editing a Policy on page 258
How to activate a policy	Activating a Policy on page 257

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For more information on...	See...
How to initiate a cancellation request for a fully-insured group policy	Initiating the Cancellation Process for a Fully-Insured Group Policy
How to cancel a fully-insured group policy	Canceling a Fully-Insured Group Policy
How to initiate a termination request for a fully-insured group policy	Initiating the Termination Process for a Fully-Insured Group Policy on page 263
How to terminate a fully-insured group policy	Terminating a Fully-Insured Group Policy on page 264
How to initiate a reinstatement request for a fully-insured group policy	Initiating the Reinstatement Process for a Fully-Insured Group Policy on page 264
How to reinstate a fully-insured group policy	Reinstating a Fully-Insured Group Policy on page 265

Policy Characteristics

The **Policy Characteristics** zone lists the characteristics of the fully-insured group or self-funded policy. It contains the following columns:

Column Name	Column Description
Effective Date	Displays the date from when the characteristic is effective for the policy.
Characteristic Type	Indicates the characteristic type.
Characteristic Value	Displays the value of the characteristic type.
Description	Displays the description of the characteristic value.
	Note: The data appears in this column when the type of characteristic value is set to **Predefined Value**.

You can filter the list using the **Effective Date** field available in the **Filter** area. By default, the **Filter** area is hidden. You can view the **Filter** area by clicking the **Filters** (▽) icon in the upper right corner of this zone.

Policy - Plan

The **Plan** tab lists the plans defined for the policy and memberships defined for each policy plan. It contains the following zones:

- Plans on page 254
- Memberships on page 256

Plans

The **Plans** zone lists the plans which are defined in the policy. It contains the following columns:

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Column Name	Column Description
Plan Information	Displays information about the policy plan. In addition, a context menu appears corresponding to this column which helps in navigating to other screens in the application.
	Note: It has a link. On clicking the link, the **Policy Plan** screen appears where you can view the details of the respective policy plan.
Price Item Information	Indicates the price item to which the policy plan is directly associated.
	Note: It has a link. On clicking the link, the **Price Item** screen appears where you can view the details of the respective price item.
Plan Number	Displays the plan number.
Plan Name	Displays the description of the policy plan.
Benefit Type	Indicates the type of health insurance plan. The valid values are: • Commercial • Medicare Affiliated
Start Date	Displays the date from when the policy plan is effective.
End Date	Displays the date till when the policy plan is effective.
Edit	On clicking the **Edit** (✎) icon, the **Plan** screen appears where you can edit the details of the policy plan.

Note: Pagination is used to display limited number of records in this zone. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

You can define a new policy plan by clicking the **Add** link in the upper-right corner of this zone. On clicking the **Broadcast** (📡) icon corresponding to a policy plan, the **Memberships** zone appears.

Note: Ideally, you define plans in a policy which is created using a policy type where the policy category is set to **Fully-Insured Group** or **Fully-Insured Individual**.

You can filter the list using various search criteria (such as, **Price Item**, **Plan Number**, and **Effective From**) available in the **Filter** area. By default, the **Filter** area is hidden. You can view the **Filter** area by clicking the **Filters** (▽) icon in the upper-right corner of this zone.

Related Topics

For more information on...	See...
How to define a plan for a fully-insured group policy	Defining a Plan for a Fully-Insured Group Policy on page 269
How to edit a plan of a fully-insured group policy	Editing a Plan of a Fully-Insured Group Policy on page 275
Memberships zone	Memberships on page 256
How to view the plans of a fully-insured group policy	Viewing the Plans of a Fully-Insured Group Policy on page 266
How to view the memberships of a fully-insured group policy plan	Viewing the Membership Details of a Fully-Insured Group Policy Plan on page 268

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Memberships

The **Memberships** zone lists the memberships which are defined for the policy plan. It contains the following columns:

Column Name	Column Description
Start Date	Displays the date from when the membership is effective.
End Date	Displays the date till when the membership is effective.
Membership Information	Displays information about the membership. **Note:** It has a link. On clicking the link, the **Membership** screen appears where you can view the details of the respective membership.
Enrolled Members	Displays the number of members who have enrolled in the policy plan.
Status	Indicates the status of the membership. The valid values are: • Active • Inactive • Terminated
Membership Type	Indicates the type of membership. The valid values are: • COBRA • Medicare • Retiree
Benefits	On clicking the **Benefits** (🔗) icon, the **Benefit** screen appears where you can view the Membership benefits of the member persons who belong to the membership. **Note:** The **Benefits** icon appears when a Membership benefit is defined for a member person who belongs to the membership.
Membership ID	Displays the membership ID.

Note: Pagination is used to display limited number of records in this zone. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

You can define a new membership by clicking the **Add** link in the upper right corner of this zone.

By default, the **Memberships** zone does not appear in the **Plan** tab. It appears when you click the **Broadcast** (📡) icon corresponding to the policy plan in the **Plans** zone.

You can filter the list using various search criteria (such as, **External Membership ID**, **Effective From**, **Person Name**, **Effective Till**, and **Status**) available in the **Filter** area. By default, the **Filter** area is hidden. You can view the **Filter** area by clicking the **Filters** (▽) icon in the upper right corner of this zone.

You can change the layout of this zone. For more information on how to change the layout, see Changing the Layout on page 4410

Related Topics

For more information on...	See...
How to define a membership for a fully-insured group policy plan	Defining a Membership for a Fully-Insured Group Policy Plan on page 294

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Policy - Log

The **Log** tab contains the following zone:

- Policy Log on page 257

Policy Log

The **Policy Log** zone lists the complete trail of actions performed on the policy. It contains the following columns:

Column Name	Column Description
Creation Date Time	Displays the date and time when the action was performed on the policy.
Details	Displays the details about the action performed on the policy.
User	Indicates the user who has performed the action on the policy.
Log Type	Indicates the type of log.
Related Object	Indicates the object or entity which is created when the action is performed on the policy.
	Note: It contains a link. On clicking the link, the screen appears where you can view the details of the respective related object.
Status Reason	Indicates the reason why the status of the policy is changed.

Note: You can manually add a log entry for the policy by clicking the **Add Log Entry** link in the upper right corner of the **Policy Log** zone.

Related Topics

For more information on...	See...
How to view the log of a policy	Viewing the Log of a Policy on page 278
How to add a log entry for a policy	Adding a Log Entry for a Policy on page 278

Activating a Policy

Procedure

To activate a policy:

1. Search for the policy in the **Policy** screen.
2. In the **Search Results** section, click the link in the **Policy Information** column corresponding to the policy that you want to activate.
   The **Policy** screen appears.
3. Ensure that the **Main** tab is selected.
4. Click the **Activate** button in the **Policy** zone.
   The status of the policy is changed to **In Force/Active**.

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Note:

The **Activate** button appears only when a policy of the respective category is in either of the following status:

Policy Category	Status
Fully-Insured Group or Fully-Insured Individual	• Pending • Pending Termination
Self-Funded	• Pending

Related Topics

For more information on...	See...
How to search for a policy	Searching for a Policy on page 239
Policy screen	Policy (Used for Viewing) on page 247
Policy zone	Policy on page 247

Editing a Policy

Prerequisites

To edit a policy, you should have:

- Values defined for the **C1-SourceSystemLookup** extendable lookup

  Note: This prerequisite is applicable only when you want to define a fully-insured group policy.

- Values defined for the **RUNOUT_ADM_OPT_FLG** lookup field

  Note: This prerequisite is applicable when you want to define a self-funded policy.

Procedure

To edit a policy:

1. Search for the policy in the **Policy** screen.
2. In the **Search Results** section, click the link in the **Policy Information** column corresponding to the policy *w*hose details you want to edit.
   The **Policy** screen appears.
3. Ensure that the **Main** tab is selected.
4. Click the **Edit** button in the **Policy** zone.

   The **Policy** screen appears. It contains the following sections:

   - **Main** - Used to specify the basic details about the policy.
   - **Persons** - Used to associate persons with the policy.
   - **Characteristics** - Used to define the characteristics for the policy.

   The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Policy Information	Displays information about the policy.	Not applicable

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Field Name	Field Description	Mandatory (Yes or No)
Policy Type	Indicates the policy type using which the policy is defined.	Not applicable
Status	Indicates the status of the policy. The valid values are: • Pending • In Force/Active • Runout • Post Runout **Note:** This field appears when you are editing a policy which is created using a policy type where the policy category is set to **Self-Funded**.	Not applicable
Policy Number	Used to specify the policy number.	Yes
Description	Used to specify the description for the policy.	Yes
Source System	Used to indicate the external system from where the policy is originated. **Note:** This field appears when you are editing a policy which is created using a policy type where the policy category is set to **Fully-Insured Group** or **Fully-Insured Individual**.	Yes
Start Date	Used to specify the date from when the policy is effective. **Note:** The policy start date cannot be later than the policy end date. You cannot change the start date of a self-funded policy when it is in the **In Force/Active**, **Runout**, or **Post Runout** status.	Yes
End Date	Used to specify the date till when the policy is effective. **Note:** The policy end date cannot be earlier than the policy start date. You cannot change the end date when the self-funded policy is in the **Runout** status. You cannot set the end date of a self-funded policy to a date which is later than or equal to the start date of a pricing rule which is defined for the **Runout** status. You cannot change the end date when the policy is renewed.	Yes
Runout End Date	Used to specify the date when the runout period of the self-funded policy ends.	No

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Field Name	Field Description	Mandatory (Yes or No)
	Note: This field appears when you are editing a policy which is created using a policy type where the policy category is set to **Self-Funded**. The runout end date cannot be earlier than or equal to the policy end date. The runout end date cannot be earlier than or equal to the system date when the policy is in the **Runout** status. You cannot remove the runout end date when the policy is in the **Runout** or **Post Runout** status. You cannot set the runout end date to a date which is later than or equal to the start date of a pricing rule which is defined for the **Post Runout** status. You cannot set the runout end date to a date which is earlier than the end date of a pricing rule which is defined for the **Runout** status.	
Runout Administration Fees	Used to indicate whether the administration fees must be charged when the claim transaction for the self-funded policy is processed in the runout period. The valid values are: • None • Percentage of Claim **Note:** At present, this field is used only for the informational purposes and is not considered during the billable charge creation for the claim transactions which are received in the runout period of the policy. This field appears when you are editing a policy which is created using a policy type where the policy category is set to **Self-Funded**.	No
Advance Level Funding Eligibility	Indicates whether the self-funded policy is eligible for the advance billing feature of level funding. **Note:** This is a read-only field. By default, the value is set to **No**. You can edit the advance level funding eligibility only through a health care inbound message. This field appears when you are defining a policy using a policy type where the policy category is set to **Self-Funded**.	Not applicable
Advance Deposit Applicability	Used to indicate whether the advance deposit is applicable for the policy.	No

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Field Name	Field Description	Mandatory (Yes or No)
	Note: This field is required only when the advance deposit level of the respective policy holder (i.e., parent customer) is set to **POLI**. However, this field is not mandatory. This field appears only when you create a policy using a policy type where the policy category is set to **Fully-Insured Group**.	
Advance Deposit Amount	Used to specify the advance deposit amount.	Yes (Conditional)
	Note: You must specify a positive value in this field. This field appears only when you create a policy using a policy type where the policy category is set to **Fully-Insured Group** .	**Note:** This field is required when the **Advance Deposit Applicability** option is selected.
Advance Deposit Grace Days	Used to specify the grace days. The system then uses the grace days to derive the grace period within which the advance deposit should be received from the group customer for the policy. While calculating the grace period, the system considers the policy start date as the grace start date. Once the grace start date is derived, the system calculates the grace end date (i.e., grace start date + grace days). For example, if a parent customer is the policy holder of the P1 policy (01-Jan-2022 to 31-Dec-2022) and advance deposit grace days is set to 6 days, then the system considers 01-Jan-2022 as the grace start date and sets the grace end date to 07-Jan-2022.	Yes (Conditional)
	Note: You must specify an integer value in this field. This field appears only when you create a policy using a policy type where the policy category is set to **Fully-Insured Group**.	**Note:** This field is required when the **Advance Deposit Applicability** option is selected.
Advance Deposit Account	Used to indicate the account of the parent customer where the advance deposit is parked for the policy.	Yes (Conditional)

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Field Name	Field Description	Mandatory (Yes or No)
	Note: This field appears only when you create a policy using a policy type where the policy category is set to **Fully-Insured Group**. You must specify an account with the account relationship type that is specified in the **Advance Deposit Account Relationship Type** attribute of the delinquency process preference. The system considers the delinquency process preference which is specified in the **Delinquency Process Field Mapping** option type of the **DELINPROC** feature configuration. For more information about the feature configuration, see Setting the DELINPROC Feature Configuration on page 4442. The **Search** (🔍) icon appears corresponding to the **Advance Deposit Account** field. On clicking the **Search** icon, the **Account Search** window appears.	**Note:** This field is required when the **Advance Deposit Applicability** option is selected.

Note:

The **Edit** button appears when a policy of the respective category is in either of the following status:

Policy Category	Status
Fully-Insured Group or Fully-Insured Individual	• In Force/Active • Canceled • Pending Cancellation • Pending • Pending Reinstatement • Pending Termination • Terminated
Self-Funded	• In Force/Active • Pending • Runout

5. Modify the required details in the **Main** section.
6. Associate the persons with the policy, if required.

Note: While editing a policy, you must ensure that one person is associated as the main customer of the policy.

7. Define, edit, or remove characteristics of the policy, if required.
8. Click **Save**.
   The changes made to the policy are saved.

Related Topics

For more information on...	See...
How to search for a policy	Searching for a Policy on page 239
Policy screen	Policy (Used for Viewing) on page 247

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For more information on...	See...
Policy zone	Policy on page 247
How to associate a person with a policy	Associating a Person with a Policy on page 244
How to define a characteristic for a policy	Defining a Characteristic for a Policy on page 246

Initiating the Termination Process for a Fully-Insured Group Policy

Prerequisites

To initiate the termination process for a fully-insured group policy, you should have:

- Reasons defined for the **Terminated** status of the **C1-POLICY** business object in the **Status Reason** screen

Procedure

To initiate the termination process for a fully-insured group policy:

1. Search for the fully-insured group policy in the **Policy** screen.
2. In the **Search Results** section, click the link in the **Policy Information** column corresponding to the policy for *w*hich you want to initiate the termination process.
   The **Policy** screen appears.
3. Ensure that the **Main** tab is selected.
4. Click the **Initiate Termination** button in the **Policy** zone.

   The **Termination Information** window appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Terminate Reason	Used to indicate the reason why you want to initiate the termination process for the fully-insured group policy.	Yes
Terminate Date	Used to specify the date when you want to terminate the policy. **Note:** The terminate date cannot be earlier than the policy start date or later than the policy end date.	Yes

Note: The **Initiate Termination** button appears when the fully-insured group policy is in the **In Force/Active** status.

5. Enter the required details in the **Termination Information** window.
6. Click **Save**.
   The status of the fully-insured group policy is changed to **Pending Termination**.

Related Topics

For more information on...	See...
How to search for a fully-insured group policy	Searching for a Policy on page 239
Policy screen	Policy (Used for Viewing) on page 247
Policy zone	Policy on page 247

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Terminating a Fully-Insured Group Policy

Prerequisites

To terminate a fully-insured group policy, you should have:

- Reasons defined for the **Terminated** status of the **C1-POLICY** business object in the **Status Reason** screen

Procedure

To terminate a fully-insured group policy:

1. Search for the fully-insured group policy in the **Policy** screen.
2. In the **Search Results** section, click the link in the **Policy Information** column corresponding to the policy that you want to terminate.
   The **Policy** screen appears.
3. Ensure that the **Main** tab is selected.
4. Click the **Terminate** button in the **Policy** zone.

   The **Status Reason** window appears. It contains the following field:

Field Name	Field Description	Mandatory (Yes or No)
Terminate Reason	Used to indicate the reason why you want to terminate the fully-insured group policy.	No
Terminate Date	Used to specify the date to terminate the fully-insured group policy.	No

Note: The **Terminate** button appears when the fully-insured group policy is in the **In Force/Active**, **Pending Reinstatement**, or **Pending Termination** status.

5. Select the terminate reason from the respective field.
6. Click **Save**.
   The status of the policy is changed to **Terminated**.

Note: You cannot terminate a fully-insured group policy which is in the **Pending Termination** status when the terminate date is earlier than the system date.

Related Topics

For more information on...	See...
How to search for a fully-insured group policy	Searching for a Policy on page 239
Policy screen	Policy (Used for Viewing) on page 247
Policy zone	Policy on page 247

Initiating the Reinstatement Process for a Fully-Insured Group Policy

Prerequisites

To initiate the reinstatement process for a fully-insured group policy, you should have:

- Reasons defined for the **Reinstated** status of the **C1-POLICY** business object in the **Status Reason** screen

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Procedure

To initiate the reinstatement process for a fully-insured group policy:

1. Search for the fully-insured group policy in the **Policy** screen.
2. In the **Search Results** section, click the link in the **Policy Information** column corresponding to the policy for *w*hich you want to initiate the reinstatement process.
   The **Policy** screen appears.
3. Ensure that the **Main** tab is selected.
4. Click the **Initiate Reinstatement** button in the **Policy** zone.

   The **Reinstate Information** window appears. It contains the following field:

Field Name	Field Description	Mandatory (Yes or No)
Reinstate Reason	Used to indicate the reason why you want to initiate the reinstatement process for the fully-insured group policy.	Yes

Note: The **Initiate Reinstatement** button appears when the fully-insured group policy is in the **Terminated** status.

5. Select the reinstate reason from the respective field.
6. Click **Save**.
   The status of the fully-insured group policy is changed to **Pending Reinstatement**.

Related Topics

For more information on...	See...
How to search for a fully-insured group policy	Searching for a Policy on page 239
Policy screen	Policy (Used for Viewing) on page 247
Policy zone	Policy on page 247

Reinstating a Fully-Insured Group Policy

Prerequisites

To reinstate a fully-insured group policy, you should have:

- Reasons defined for the **Reinstated** status of the **C1-POLICY** business object in the **Status Reason** screen

Procedure

To reinstate a fully-insured group policy:

1. Search for the fully-insured group policy in the **Policy** screen.
2. In the **Search Results** section, click the link in the **Policy Information** column corresponding to the policy that *y*ou want to reinstate.
   The **Policy** screen appears.
3. Ensure that the **Main** tab is selected.
4. Click the **Reinstate** button in the **Policy** zone.

   The **Status Reason** window appears. It contains the following field:

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Field Name	Field Description	Mandatory (Yes or No)
Status Reason	Used to indicate the reason why you want to reinstate the fully-insured group policy.	Yes

Note: The **Reinstate** button appears when the fully-insured group policy is in the **Pending Reinstatement** or **Terminated** status.

5. Select the reinstatement reason from the respective field.
6. Click **Save**.
   The status of the policy is changed to **Reinstated**.

Related Topics

For more information on...	See...
How to search for a fully-insured group policy	Searching for a Policy on page 239
Policy screen	Policy (Used for Viewing) on page 247
Policy zone	Policy on page 247

Viewing the Plans of a Fully-Insured Group Policy

Procedure

To view the plans of a fully-insured group policy:

1. Search for the fully-insured group policy in the **Policy** screen.
2. In the **Search Results** section, click the link in the **Policy Information** column corresponding to the policy *w*hose details you want to view.
   The **Policy** screen appears.
3. Click the **Plan** tab.
   The **Plan** tab appears.
4. View the plans of the fully-insured group policy in the **Plans** zone.

Related Topics

For more information on...	See...
How to search for a fully-insured group policy	Searching for a Policy on page 239
Policy screen	Policy (Used for Viewing) on page 247
Plans zone	Plans on page 254

Viewing the Memberships of a Fully-Insured Group Policy Plan

Procedure

To view the memberships of a fully-insured group policy plan:

1. Search for the fully-insured group policy in the **Policy** screen.

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2. In the **Search Results** section, click the link in the **Policy Information** column corresponding to the policy *w*hose details you want to view.
   The **Policy** screen appears.
3. Click the **Plan** tab.
   The **Plan** tab appears.
4. In the **Plans** zone, click the **Broadcast** (📡) icon corresponding to the policy plan whose memberships you *w*ant to view.
   The **Memberships** zone appears.
5. View the memberships of the fully-insured group policy plan in the **Memberships** zone.

Related Topics

For more information on...	**See...**
How to search for a fully-insured group policy	Searching for a Policy on page 239
Policy screen	Policy (Used for Viewing) on page 247
Plans zone	Plans on page 254
Memberships zone	Memberships on page 256

Viewing the Fully-Insured Group Policy Plan Details

Procedure

To view the details of a fully-insured group policy plan:

1. Search for the fully-insured group policy in the **Policy** screen.
2. In the **Search Results** section, click the link in the **Policy Information** column corresponding to the policy *w*hose details you want to view.
   The **Policy** screen appears.
3. Click the **Plan** tab.
   The **Plan** tab appears.
4. In the **Plans** zone, click the link in the **Plan Information** column corresponding to the policy plan whose *d*etails you want to view.
   The **Policy Plan** screen appears.
5. View the basic details of the policy plan in the **Policy Plan** zone.
6. View the characteristics of the policy plan in the **Plan Characteristics** zone.
7. View the memberships of the policy plan in the **Memberships** zone.

Related Topics

For more information on...	**See...**
How to search for a fully-insured group policy	Searching for a Policy on page 239
Policy screen	Policy (Used for Viewing) on page 247
Plans zone	Plans on page 254
Policy Plan screen	Policy Plan (Used for Viewing) on page 279
Policy Plan zone	Policy Plan on page 279

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For more information on...	See...
Plan Characteristics zone	Plan Characteristics on page 281
Memberships zone	Memberships on page 256

Viewing the Membership Details of a Fully-Insured Group Policy Plan

Procedure

To view the details of a membership in a fully-insured group policy plan:

1. Search for the fully-insured group policy in the **Policy** screen.
2. In the **Search Results** section, click the link in the **Policy Information** column corresponding to the policy *w*hose details you want to view.
   The **Policy** screen appears.
3. Click the **Plan** tab.
   The **Plan** tab appears.
4. In the **Plans** zone, click the **Broadcast** (ᯤ) icon corresponding to the fully-insured group policy plan whose *m*embership details you want to view.
   The **Memberships** zone appears.
5. In the **Memberships** zone, click the link in the **Membership Information** column corresponding to the *m*embership whose details you want to view.
   The **Membership** screen appears.
6. Ensure that the **Main** tab is selected.
7. View the basic details of the membership in the **Membership** zone.
8. View the characteristics of the membership in the **Membership Characteristics** zone.
9. View the persons who are added to the membership in the **Member Persons** zone.
10. View the characteristics of the member person in the **Member Person Characteristics** zone.
11. View the additional memberships of the main subscriber in the **Other Plans of Main Subscriber** zone.

Related Topics

For more information on...	See...
How to search for a fully-insured group policy	Searching for a Policy on page 239
Policy screen	Policy (Used for Viewing) on page 247
Plans zone	Plans on page 254
Memberships zone	Memberships on page 256
Membership screen	Membership (Used for Viewing) on page 298
Membership zone	Membership on page 299
Membership Characteristics zone	Membership Characteristics on page 303
Member Persons zone	Member Persons on page 303
Member Person Characteristics zone	Member Person Characteristics on page 304
Other Plans of Main Subscriber zone	Other Plans of Main Subscriber on page 305

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Defining a Plan for a Fully-Insured Group Policy

Prerequisites

To define a plan for a fully-insured group policy, you should have:

- Policy plan business objects defined in the application
- Price items defined in the application

Procedure

To define a plan for a fully-insured group policy:

1. Search for the fully-insured group policy in the **Policy** screen.
2. In the **Search Results** section, click the link in the **Policy Information** column corresponding to the policy for *w*hich you want to define a plan.
   The **Policy** screen appears.
3. Click the **Plan** tab.
   The **Plan** tab appears.
4. Click the **Add** link in the upper right corner of the **Plans** zone.

   The **Select Business Object** screen appears. It contains the following field:

Field Name	Field Description	Mandatory (Yes or No)
Policy Plan Business Object	Used to indicate the business object using which you want to create a plan for a fully-insured group policy.	Yes

> **Tip:** Alternatively, you can access this screen by clicking the **Add** link in the upper right corner of the **Policy Plan** zone in the **Policy Plan** screen.

> **Note:** The **Select Business Object** screen appears when there are multiple policy plan business objects defined in the application. If there is only one policy plan business object defined in the application, the **Plan** screen appears.

5. Select the required policy plan business object from the respective field.
6. Click **OK**.

   The **Policy Plan** screen appears. It contains the following sections:

   - **Main** - Used to specify the basic details about the policy plan.
   - **Pricing Rule Types** - Used to associate the pricing rule types with the policy plan.
   - **Proration Rules** - Used to define the proration rules for the policy plan.
   - **Characteristics** - Used to define the characteristics for the policy plan.

   The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Policy Information	Indicates the fully-insured group policy for which you want to create the policy plan.	Not applicable
Price Item	Used to indicate the price item which you want to directly associate with the policy plan.	Yes (Conditional)

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The **Search** (🔍) icon appears corresponding to this field. On clicking the **Search** icon, the **Price Item Search** window appears. On specifying the price item, the description of the price item appears corresponding to the **Price Item** field.	**Note:** You must either specify the price item or associate at least one pricing rule type with the policy plan.
Plan Number	Used to specify the plan number.	Yes
Plan Name	Used to specify the description for the policy plan.	No
Benefit Type	Used to indicate the type of health insurance plan. The valid values are: • Commercial • Medicare Affiliated	No
Start Date	Used to specify the date from when the policy plan is effective. **Note:** The policy plan start date cannot be earlier than the policy start date and later than the policy end date. The policy plan start date cannot be later than the policy plan end date.	Yes
End Date	Used to specify the date till when the policy plan is effective. **Note:** The policy plan end date cannot be earlier than the policy start date and later than the policy end date. The policy plan end date cannot be earlier than the policy plan start date.	No

7. Enter the required details in the **Main** section.
8. Associate the pricing rule types with the fully-insured group policy plan, if required.

Note: You must associate at least one pricing rule type with the policy plan when the price item is not specified in the fully-insured group policy plan.

9. Define the proration rules for the fully-insured group policy plan, if required.
10. Define the characteristics for the fully-insured group policy plan, if required.
11. Click **Save**.
    The plan is defined for the fully-insured group policy.

Related Topics

For more information on...	See...
How to search for a fully-insured group policy	Searching for a Policy on page 239

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For more information on...	See...
Policy screen	Policy (Used for Viewing) on page 247
Plans zone	Plans on page 254
Policy Plan zone	Policy Plan on page 279
How to associate a pricing rule type with a fully-insured group policy plan	Associating a Pricing Rule Type with a Fully-Insured Group Policy Plan on page 273
How to define a proration rule for a fully-insured group policy plan	Defining a Proration Rule for a Fully-Insured Group Policy Plan on page 271
How to define a characteristic for a fully-insured group policy plan	Defining a Characteristic for a Fully-Insured Group Policy Plan on page 274

Defining a Proration Rule for a Fully-Insured Group Policy Plan

Procedure

To define a proration rule for a fully-insured group policy plan:

1. Ensure that the **Proration Rules** section is expanded when you are defining or editing a fully-insured group policy plan.

   The **Proration Rules** section contains the following fields in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Effective Date	Used to specify the date from when the proration rule is effective for the policy plan. **Note:** The system considers the latest proration rule and not the effective proration rule while prorating the membership premium. The effective date cannot be earlier than the plan start date and later than the plan end date.	Yes (Conditional) **Note:** This field is required when you are defining a proration rule for the policy plan.
Proration Event Type	Used to indicate the event when you want to prorate the membership premium. The valid values are: • **Enrollment** - Used when you want to prorate the membership premium on enrolling a member person. • **Termination** - Used when you want to prorate the membership premium on terminating a member person. • **New Born** - Used when you want to prorate the membership premium on enrolling a new born. • **Same Month Enrollment and Termination** - Used when you want to prorate the membership premium on enrolling and terminating a member person in the same month.	Yes (Conditional) **Note:** This field is required when you are defining a proration rule for the policy plan.
Proration Type	Used to indicate how you want to prorate the membership premium. The valid values are:	Yes (Conditional)

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Field Name	Field Description	Mandatory (Yes or No)
	• **Daily** - Used when you want to prorate the membership premium from the day the proration event has occurred. • **Mid-Month** - Used when you want to prorate the membership premium based on the proration date. The system calculates the proration date using the following formula: `Bill Period Start Date + Specified ' Number of Days` For example, if the bill period start date is 1st of every month and number of days is 15, then the proration date would be 15th of every month. If a member person is enrolled to the membership on or before the proration date, the system will charge the premium for the member person. However, if a member person is enrolled to the membership after the proration date, the system will not charge the premium for the member person. And, if a member person is terminated from the membership on or after the proration date, the system will charge the premium for the member person. However, if a member person is terminated from the membership before the proration date, the system will not charge the premium for the member person. • **Full Month** - Used when the premium for a member person should be charged when the member person is enrolled or terminated on the coverage start date or coverage end date, respectively. If a member person is enrolled or terminated within the coverage period, the system will not charge the premium for the member person.	**Note:** This field is required when you are defining a proration rule for the policy plan.
	• **Waiver** - Used when the premium for a member person should be waived off completely for the month when the member person is enrolled or terminated from the membership. • **Coverage Days** - Used when you want to prorate the premium for a member person based on the coverage days. If a member person is covered in the membership for a period less than the specified number of days, the system will not charge the premium for the member person. However, if a member person is covered in the membership for a period equal to or more than the specified number of days, the system will charge the premium for the member person. **Note:** You can use this proration type when the proration event is set to **Same Month Enrollment and Termination**.	
	• **Enrollment** - Used when you want to prorate the premium for a member person using the proration type of the enrollment event. **Note:** You can use this proration type when the proration event is set to **Same Month Enrollment and Termination**.	

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Field Name	Field Description	Mandatory (Yes or No)
	• **Termination** - Used when you want to prorate the premium for a member person using the proration type of the termination event. **Note:** You can use this proration type only when the proration event is set to **Same Month Enrollment and Termination**.	
Number of Days	Used to specify the number of days to determine the cutoff date.	Yes (Conditional) **Note:** This field is required when the proration type is set to **Mid-Month** or **Coverage Days**.

2. Enter the required details in the **Proration Rules** section.
3. If you want to define more than one proration rule for the fully-insured group policy plan, click the **Add** (+) icon and then *r*epeat step 2.

Note: However, if you want to remove a proration rule of the fully-insured group policy plan, click the **Delete** ( ) icon corresponding to the proration rule.

4. Click **Save**.
   The proration rules are defined for the fully-insured group policy plan.

Related Topics

For more information on...	See...
How to define a plan for a fully-insured group policy	Defining a Plan for a Fully-Insured Group Policy on page 269
How to edit a plan of a fully-insured group policy	Editing a Plan of a Fully-Insured Group Policy on page 275

Associating a Pricing Rule Type with a Fully-Insured Group Policy Plan

You can define a pricing rule using a pricing rule type for a fully-insured group policy plan when the pricing rule type is associated with the fully-insured group policy plan. You can associate a pricing rule type with a fully-insured group policy plan either from the user interface or through a health care inbound message.

Prerequisites

To associate a pricing rule type with a fully-insured group policy plan, you should have:

- Pricing rule types defined in the application (where the pricing rule type category is set to **Age Based**, **Tier Based**, or **Pass-Through Billable Charge**)

Procedure

To associate a pricing rule type with a fully-insured group policy plan:

1. Ensure that the **Pricing Rule Types** section is expanded when you are defining or editing a fully-insured group policy *p*lan.

   The **Pricing Rule Types** section contains the following field in a grid:

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Field Name	Field Description	Mandatory (Yes or No)
Pricing Rule Type	Used to indicate the pricing rule type that you want to associate with the fully-insured group policy plan. **Note:** The **Search** (🔍) icon appears corresponding to this field. On clicking the **Search** icon, the **Pricing Rule Type Search** window appears. On specifying the pricing rule type, the description of the pricing rule type appears corresponding to the **Pricing Rule Type** field. Here, you can only specify a pricing rule type where the pricing rule type category is set to **Age Based**, **Tier Based**, or **Pass-Through Billable Charge**.	Yes (Conditional) **Note:** You must either specify the price item or associate at least one pricing rule type with the policy plan.

2. Enter the required details in the **Pricing Rule Types** section.
3. If you want to associate more than one pricing rule type with the fully-insured group policy plan, click the **Add** (+) *i*con and then repeat step 2.

Note: However, if you want to dissociate a pricing rule type from the fully-insured group policy plan, click the **Delete** (🗑) icon corresponding to the pricing rule type.

4. Click **Save**.
   The pricing rule types are associated with the fully-insured group policy plan.

Related Topics

For more information on...	See...
How to define a plan for a fully-insured group policy	Defining a Plan for a Fully-Insured Group Policy on page 269
How to edit a plan of a fully-insured group policy	Editing a Plan of a Fully-Insured Group Policy on page 275

Defining a Characteristic for a Fully-Insured Group Policy Plan

Prerequisites

To define a characteristic for a fully-insured group policy plan, you should have:

- Characteristic types defined in the application (where the characteristic entity is set to **Policy Plan**).

Procedure

To define a characteristic for a fully-insured group policy plan:

1. Ensure that the **Characteristics** section is expanded when you are defining or editing a fully-insured group policy *p*lan.

   The **Characteristics** section contains the following fields in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Effective Date	Used to specify the date from when the characteristic is effective for the fully-insured group policy plan.	Yes (Conditional)

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The effective date cannot be earlier than the policy plan start date and later than the policy plan end date.	**Note:** This field is required when you are defining a characteristic for the fully-insured group policy plan.
Characteristic Type	Used to indicate the characteristic type.	Yes (Conditional)
	Note: The list includes only those characteristic types where the characteristic entity is set to **Policy Plan**.	**Note:** This field is required when you are defining a characteristic for the fully-insured group policy plan.
Characteristic Value	Used to specify the value for the characteristic type.	Yes (Conditional)
	Note: If you select a predefined characteristic type, the **Search** (🔍) icon appears corresponding to the **Characteristic Value** field. On clicking the **Search** icon, the **Predefined Characteristic Search** window appears. On specifying the value for a predefined characteristic type, the description of the characteristic value appears corresponding to the **Characteristic Value** field.	**Note:** This field is required when you are defining a characteristic for the fully-insured group policy plan.

2. Enter the required details in the **Characteristics** section.
3. If you want to define more than one characteristic for the fully-insured group policy plan, click the **Add** (+) icon and *t*hen repeat step 2.

Note: However, if you want to remove a characteristic from the fully-insured group policy plan, click the **Delete** (🗑) icon corresponding to the characteristic.

4. Click **Save**.
   The characteristics are defined for the fully-insured group policy plan.

Related Topics

For more information on...	See...
How to define a plan for a fully-insured group policy	Defining a Plan for a Fully-Insured Group Policy on page 269
How to edit a plan of a fully-insured group policy	Editing a Plan of a Fully-Insured Group Policy on page 275

Editing a Plan of a Fully-Insured Group Policy

Prerequisites

To edit a plan of a fully-insured group policy, you should have:

- Price items defined in the application

Procedure

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To edit a plan of a fully-insured group policy:

1. Search for the fully-insured group policy in the **Policy** screen.
2. In the **Search Results** section, click the link in the **Policy Information** column corresponding to the policy *w*hose details you want to edit.
   The **Policy** screen appears.
3. Click the **Plan** tab.
   The **Plan** tab appears.
4. In the **Plans** zone, click the **Edit** (✎) icon in the **Edit** column corresponding to the policy plan whose details *y*ou want to edit.

   The **Policy Plan** screen appears. It contains the following sections:

   - **Main** - Used to specify the basic details about the fully-insured group policy plan.
   - **Pricing Rule Types** - Used to associate the pricing rule types with the fully-insured group policy plan.
   - **Proration Rules** - Used to define the proration rules for the fully-insured group policy plan.
   - **Characteristics** - Used to define the characteristics for the fully-insured group policy plan.

   The **Main** section contains the following fields:

Field Name	**Field Description**	**Mandatory (Yes or No)**
Plan Information	Displays information about the fully-insured group policy plan.	Not applicable
Policy Information	Indicates the fully-insured group policy for which the policy plan is created.	Not applicable
Price Item	Used to indicate the price item which you want to directly associate with the fully-insured group policy plan. **Note:** The **Search** (🔍) icon appears corresponding to this field. On clicking the **Search** icon, the **Price Item Search** window appears. On specifying the price item, the description of the price item appears corresponding to the **Price Item** field.	Yes (Conditional) **Note:** You must either specify the price item or associate at least one pricing rule type with the policy plan.
Plan Number	Used to specify the plan number.	Yes
Plan Name	Used to specify the description for the fully-insured group policy plan.	No
Benefit Type	Used to indicate the type of health insurance plan. The valid values are: • Commercial • Medicare Affiliated	No
Start Date	Used to specify the date from when the fully-insured group policy plan is effective.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The fully-insured group policy plan start date cannot be earlier than the policy start date and later than the policy end date. The fully-insured group policy plan start date cannot be later than the policy plan end date.	
End Date	Used to specify the date till when the fully-insured group policy plan is effective.	No
	Note: The fully-insured group policy plan end date cannot be earlier than the policy start date and later than the policy end date. The fully-insured group policy plan end date cannot be earlier than the policy plan start date.	

Tip: Alternatively, you can edit the details of a fully-insured group policy plan by clicking the **Edit** button in the **Policy Plan** zone of the **Policy Plan** screen.

5. Modify the required details in the **Main** section.
6. Associate the pricing rule types with the fully-insured group policy plan, if required.

Note: You must associate at least one pricing rule type with the policy plan when the price item is not specified in the fully-insured group policy plan.

7. Define, edit, or remove the proration rules of the fully-insured group policy plan, if required.
8. Define, edit, or remove characteristics of the fully-insured group policy plan, if required.
9. Click **Save**.
   The changes made to the fully-insured group policy plan are saved.

Related Topics

For more information on...	See...
How to search for a fully-insured group policy	Searching for a Policy on page 239
Policy screen	Policy (Used for Viewing) on page 247
Plans zone	Plans on page 254
Policy Plan screen	Policy Plan (Used for Viewing) on page 279
Policy Plan zone	Policy Plan on page 279
How to associate a pricing rule type with a fully-insured group policy plan	Associating a Pricing Rule Type with a Fully-Insured Group Policy Plan on page 273
How to define a proration rule for a fully-insured group policy plan	Defining a Proration Rule for a Fully-Insured Group Policy Plan on page 271

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For more information on...	See...
How to define a characteristic for a fully-insured group policy plan	Defining a Characteristic for a Fully-Insured Group Policy Plan on page 274

Viewing the Log of a Policy

Procedure

To view the log of a policy:

1. Search for the policy in the **Policy** screen.
2. In the **Search Results** section, click the link in the **Policy Information** column corresponding to the policy *w*hose details you want to view.
   The **Policy** screen appears.
3. Click the **Log** tab.
   The **Log** tab appears.
4. View the complete trail of actions performed on the policy in the **Policy Log** zone.

Related Topics

For more information on...	See...
How to search for a policy	Searching for a Policy on page 239
Policy screen	Policy (Used for Viewing) on page 247
Policy Log zone	Policy Log on page 257
How to add a log entry for a policy	Adding a Log Entry for a Policy on page 278

Adding a Log Entry for a Policy

Procedure

To add a log entry for a policy:

1. Search for the policy in the **Policy** screen.
2. In the **Search Results** section, click the link in the **Policy Information** column corresponding to the policy for *w*hich you want to add a log entry.
   The **Policy** screen appears.
3. Click the **Log** tab.
   The **Log** tab appears.
4. Click the **Add Log Entry** link in the upper right corner of the **Policy Log** zone.

   The **Add Policy Log** window appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Policy Information	Displays information about the policy.	Not applicable
Log Details	Used to specify additional comments for the policy.	Yes

5. Enter the comments in the **Log Details** field.
6. Click **Save**.

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The log entry is added in the **Policy Log** zone.

Related Topics

For more information on...	See...
How to search for a policy	Searching for a Policy on page 239
Policy screen	Policy (Used for Viewing) on page 247
Policy Log zone	Policy Log on page 257

Policy Plan (Used for Viewing)

The **Policy Plan** screen allows you to:

- View the details of a fully-insured group policy plan
- View the characteristics of a fully-insured group policy plan
- Add and edit a fully-insured group policy plan
- Add a membership to a fully-insured group policy plan

It contains the following zones:

- Policy Plan on page 279
- Plan Characteristics on page 281
- Memberships on page 256

Policy Plan

The **Policy Plan** zone displays the details of the policy plan. It contains the following sections:

- **Main** - Displays the basic information about the policy plan. It contains the following fields:

Field Name	Field Description
Plan Information	Displays information about the policy plan.
Policy Information	Displays information about the policy. **Note:** It has a link. On clicking the link, the **Policy** screen appears where you can view the details of the respective policy.
Price Item Information	Indicates the price item to which the policy plan is directly associated. **Note:** It has a link. On clicking the link, the **Price Item** screen appears where you can view the details of the respective price item.
Plan Number	Displays the plan number.
Plan Name	Displays the description of the policy plan.
Benefit Type	Indicates the type of health insurance plan. The valid values are: • Commercial • Medicare Affiliated

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Field Name	Field Description
	Note: This field appears when the benefit type is set to **COBRA** or **Medicare Affiliated**.
Start Date	Displays the date from when the policy plan is effective.
End Date	Displays the date till when the policy plan is effective.

- **Pricing Rule Types** - Lists the pricing rule types which are associated with the policy plan. It contains the following column:

Column Name	Column Description
Pricing Rule Type	Indicates the pricing rule type which is associated with the policy plan.
	Note: It has a link. On clicking the link, the **Pricing Rule Type** screen appears where you can view the details of the respective pricing rule type.

- **Record Actions** - This section contains the following buttons:

Button Name	Button Description
Edit	Used to edit the details of the policy plan.

- **Record Information** - This section contains the following field:

Field Name	Field Description
Business Object	Indicates the business object using which the policy plan is created. In addition, a context menu appears corresponding to this field which helps in navigating to other screens in the application.
	Note: It has a link. On clicking the link, the **Business Object** screen appears where you can view the details of the respective business object.

- **Proration Rules** - Lists the proration rules defined for the policy plan. It contains the following columns:

Column Name	Column Description
Effective Date	Displays the date from when the proration rule is effective for the policy plan.
Proration Event Type	Indicates the event when the membership premium should be prorated. The valid values are: • Enrollment • Termination • New Born • Same Month Enrollment and Termination
Proration Type	Indicates how the membership premium should be prorated. The valid values are: • Daily • Mid-Month • Full Month • Waiver • Coverage Days • Enrollment • Termination

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Column Name	Column Description
Number of Days	Displays the number of days using which the cutoff date is calculated. **Note:** The data appears in this column when the proration type is set to **Mid-Month** or **Coverage Days**.
Membership Type	Indicates the type of membership. The valid values are: • COBRA • Medicare • Retiree

You can define a new policy plan by clicking the **Add** link in the upper right corner of this zone.

Related Topics

For more information on...	See...
How to define a plan for a fully-insured group policy	Defining a Plan for a Fully-Insured Group Policy on page 269
How to edit a plan of a fully-insured group policy	Editing a Plan of a Fully-Insured Group Policy on page 275

Plan Characteristics

The **Plan Characteristics** zone lists the characteristics of the fully-insured group policy plan. It contains the following columns:

Column Name	Column Description
Effective Date	Displays the date from when the characteristic is effective for the policy plan.
Characteristic Type	Indicates the characteristic type.
Characteristic Value	Displays the value of the characteristic type.
Description	Displays the description of the characteristic value. **Note:** The data appears in this column when the type of characteristic value is set to **Predefined Value**.

You can filter the list using the **Effective Date** field available in the **Filter** area. By default, the **Filter** area is hidden. You can view the **Filter** area by clicking the **Filters** (▽) icon in the upper right corner of this zone.

Memberships

The **Memberships** zone lists the memberships which are defined for the policy plan. It contains the following columns:

Column Name	Column Description
Start Date	Displays the date from when the membership is effective.
End Date	Displays the date till when the membership is effective.

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Column Name	Column Description
Membership Information	Displays information about the membership. **Note:** It has a link. On clicking the link, the **Membership** screen appears where you can view the details of the respective membership.
Enrolled Members	Displays the number of members who have enrolled in the policy plan.
Status	Indicates the status of the membership. The valid values are: • Active • Inactive • Terminated
Membership Type	Indicates the type of membership. The valid values are: • COBRA • Medicare • Retiree
Benefits	On clicking the **Benefits** (🔗) icon, the **Benefit** screen appears where you can view the Membership benefits of the member persons who belong to the membership. **Note:** The **Benefits** icon appears when a Membership benefit is defined for a member person who belongs to the membership.
Membership ID	Displays the membership ID.

Note: Pagination is used to display limited number of records in this zone. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

You can define a new membership by clicking the **Add** link in the upper right corner of this zone.

By default, the **Memberships** zone does not appear in the **Plan** tab. It appears when you click the **Broadcast** (📡) icon corresponding to the policy plan in the **Plans** zone.

You can filter the list using various search criteria (such as, **External Membership ID**, **Effective From**, **Person Name**, **Effective Till**, and **Status**) available in the **Filter** area. By default, the **Filter** area is hidden. You can view the **Filter** area by clicking the **Filters** (▽) icon in the upper right corner of this zone.

You can change the layout of this zone. For more information on how to change the layout, see Changing the Layout on page 4410

Related Topics

For more information on...	See...
How to define a membership for a fully-insured group policy plan	Defining a Membership for a Fully-Insured Group Policy Plan on page 294

Charges

The **Charges** tab lists the charges defined for the billable charges and bill segment details defined for each policy plan. It contains the following zones:

- Policy Plan Billable Charges on page 283
- Policy Plan Bill Segment Details on page 284

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Policy Plan Billable Charges

The **Billable Charges** zone lists the one-time or recurring billable charges which are created for the policy plan. It contains the following columns:

Column Name	Column Description
Start Date	Displays the start date of the billable charge.
End Date	Displays the end date of the billable charge.
Bill Period	Indicates the intervals at which the recurring bill segments must be created for the billable charge.
Price Item Information	Indicates the price item for which the billable charge is created. **Note:** It has a link. On clicking the link, the **Price Item** screen appears where you can view the details of the respective price item.
Account ID	Indicates the account for which the billable charge is created. **Note:** It has a link. On clicking the link, the **Account** screen appears where you can view the details of the respective account.
Contract ID	Indicates the contract against which the billable charge is created. **Note:** It has a link. On clicking the link, the **Contract** screen appears where you can view the details of the respective contract.
Billable Charge Information	Displays information about the billable charge. **Note:** It has a link. On clicking the link, the **Billable Charge** screen appears where you can view the details of the respective billable charge.
Amount	Displays the billable charge amount.
Status	Indicates the status of the billable charge. The valid values are: • Billable • Cancelled
Last Billed Coverage	Indicates the last bill segment generated for the billable charge which is in the **Frozen** status. In addition, a context menu appears corresponding to this column which helps in navigating to other screens in application. **Note:** It has a link. On clicking the link, the **Bill Segment** screen appears where you can view the details of the respective bill segment.

Note: Pagination is used to display limited number of records in this zone. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

On clicking the **Broadcast** (📡) icon corresponding to a billable charge, the **Bill Segment Details**zone appears.

You can filter the list using various search criteria (such as, **Price Item**, **Start Date**, **Contract ID**, **End Date**, and **Status**) available in the **Filter** area. By default, the **Filter** area is hidden. You can view the **Filter** area by clicking the **Filters** (▽) icon in the upper right corner of this zone.

Related Topics

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For more information on...	See...
How to view the billable charges created for a policy plan	Viewing the Billable Charges Created for a Policy Plan on page 285
Policy Plan Bill Segment Details zone	Policy Plan Bill Segment Details on page 284

Policy Plan Bill Segment Details

The **Bill Segment Details** zone lists all bill segments which are generated for the policy plan. It contains the following columns:

Column Name	Column Description
Start Date	Displays the start date of the bill segment.
End Date	Displays the end date of the bill segment.
Bill Segment Information	Displays information about the bill segment. In addition, this column has a context menu which helps in navigating to other screens in the application. **Note:** It has a link. On clicking the link, the **Billable Segment** screen appears where you can view the details of the respective bill segment.
Billed Amount	Displays the bill segment amount.
Status	Indicates the status of the bill segment. The valid values are: • Incomplete • Error • Freezable • Pending Cancel • Canceled • Frozen
Bill Information	Indicates the bill in which the bill segment is created. In addition, this column has a context menu which helps in navigating to other screens in the application. **Note:** It has a link. On clicking the link, the **Bill** screen appears where you can view the details of the respective bill.

Note: Pagination is used to display limited number of records in this zone. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

By default, the **Bill Segment Details** zone does not appear in the **Charges** tab of the **Policy Plan** screen. It appears when you click the **Broadcast** (📡) icon corresponding to a billable charge in the **Billable Charges** zone.

You can filter the list using various search criteria (such as, **Start Date**, **Status**, and **End Date**) available in the **Filter** area. By default, the **Filter** area is hidden. You can view the **Filter** area by clicking the **Filters** (▽) icon in the upper right corner of this zone.

Related Topics

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For more information on...	See...
How to view the billable segments generated for a Policy Plan Level Billable Charge	Viewing the Bill Segments Generated for a Policy Plan Level Billable Charge on page 285
Policy Plan Billable Charges zone	Policy Plan Billable Charges on page 283

Viewing the Billable Charges Created for a Policy Plan

Procedure

To view the billable charges created for a policy plan:

1. Search for the policy in the **Policy** screen.
2. In the **Search Results** section, click the link in the **Policy Information** column corresponding to the *p*olicy whose details you want to view.
   The **Policy** screen appears.
3. Click the **Plan** tab.
   The **Plan** tab appears.
4. In the **Search Results** section, click the link in the **Plan Information** column corresponding to the *p*lans whose details you want to view.
   The **Policy Plan** screen appears.
5. Click the **Charges** tab.
   The **Charges** tab appears.
6. View the billable charges created for the policy plan in the **Billable Charges** zone.

Related Topics

For more information on...	
Policy Plan Billable Charges zone	Policy Plan Billable Charges on page 283

Viewing the Bill Segments Generated for a Policy Plan Level Billable Charge

Procedure

To view the bill segments generated for a Policy Plan Level billable charge:

1. Search for the policy in the **Policy** screen.
2. In the **Search Results** section, click the link in the **Policy Information** column corresponding to the *p*olicy whose details you want to view.
   The **Policy** screen appears.
3. Click the **Plan** tab.
   The **Plan** tab appears.
4. In the **Search Results** section, click the link in the **Plan Information** column corresponding to the *p*lans whose details you want to view.
   The **Policy Plan** screen appears.
5. Click the **Charges** tab.
   The **Charges** tab appears.
6. In the **Billable Charges** zone, click the **Broadcast** (📡) icon corresponding to the billable charge whose bill *s*egments you want to view.

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The **Bill Segment Details**zone appears.

7. View the bill segments generated for the billable charge in the **Bill Segment Details** zone.

Related Topics

For more information on...	
Policy Plan Charges screen	Charges on page 282
Policy Plan Billable Charges zone	Policy Plan Billable Charges on page 283
Policy Plan Bill Segment Details zone	Policy Plan Bill Segment Details on page 284

Membership (Used for Searching)

The **Membership** screen allows you to search for an individual or group membership using various search criteria. It also allows you to define an individual or group membership. It contains the following zone:

- Search Membership on page 286

Through this screen, you can navigate to the following screen:

- Membership (Used for Viewing) on page 298

Search Membership

The **Search Membership** zone allows you to search for a fully-insured individual or group membership using various search criteria. It contains the following two sections:

- **Search Criteria** - The **Search Criteria** section contains the following fields:

Field Name	**Field Description**	**Mandatory (Yes or No)**
Search By	Used to indicate whether you want to search for a membership using the membership, policy plan, member person, or health plan details. The valid values are: • Membership Details • Policy Plan Details • Person Details • Health Plan Details **Note:** By default, **Membership Details** option is selected.	No
Membership ID	Used to search a particular membership. **Note:** This field appears when the **Membership Details** option is selected from the **Search By** list.	No
External Membership ID	Used to search a membership with a particular external membership ID. **Note:** This field appears when the **Membership Details** option is selected from the **Search By** list.	No

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Field Name	Field Description	Mandatory (Yes or No)
Start Date	Used to search memberships which are effective from a particular date onwards. **Note:** This field appears when the **Membership Details** option is selected from the **Search By** list.	No
End Date	Used to search memberships which are effective till a particular date. **Note:** This field appears when the **Membership Details** option is selected from the **Search By** list.	No
Status	Used to search memberships with a particular status. The valid values are: • Active • Canceled • Draft • Pending Effectuation • Terminated **Note:** This field appears when the **Membership Details** option is selected from the **Search By** list.	No
Membership Type	Used to search memberships of a particular type. The valid values are: • COBRA • Medicare • Retiree **Note:** If you want to search for an active employee coverage membership, you must leave this field blank. This field appears when the **Membership Details** or **Policy Plan Details** or **Person Details**, or **Health Plan Details** option is selected from the **Search By** list.	No
Benefit Type	Used to search memberships where a member person has availed for a particular type of benefit. The valid values are: • Commercial • Medicare Affiliated **Note:** This field appears when the **Membership Details** or **Person Details** option is selected from the **Search By** list.	No
Benefit Sub Type	Used to search memberships where a member person has availed for a particular membership benefit.	No

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Field Name	Field Description	Mandatory (Yes or No)
	Note: This field appears when the **Membership Details** or **Person Details** option is selected from the **Search By** list. The list includes only those benefit types which are defined through the **Benefit Sub Type** screen.	
Membership Identifier Type	Used to search memberships which are associated with a membership identifier type. **Note:** This field appears when the **Membership Details** option is selected from the **Search By** list. You can only search individual memberships, if you are specifying the membership identifier type.	Yes (Conditional) **Note:** This field is required when you are searching for a membership using a membership identifier type.
Membership Identifier	Used to search memberships with a particular identifier. **Note:** This field appears when the **Membership Details** option is selected from the **Search By** list. You can only search individual memberships, if you are specifying the membership identifier.	Yes (Conditional) **Note:** This field is required when you are searching for a membership using a membership identifier.
Rate Guarantee Start Date	Used to specify the date from when the rate guarantee is available for the individual membership. **Note:** This field appears when the **Membership Details** or **Health Plan Details** option is selected from the **Search By** list.	Yes
Rate Guarantee End Date	Used to specify the date till when the rate guarantee is available for the individual membership. **Note:** This field appears when the **Membership Details** or **Health Plan Details** option is selected from the **Search By** list.	Yes (Conditional) **Note:** This data is required if you have specified the rate guarantee start date while defining the individual membership.
Late Setup	Used to indicate whether the member person details should be included in an individual or group membership once the membership is created. **Note:** This field appears when the **Membership Details** or **Policy Plan Details** or **Health Plan Details** option is selected from the **Search By** list.	Yes (Conditional) **Note:** This field is required to provide premium waiver to the member person if required.

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Field Name	Field Description	Mandatory (Yes or No)
Characteristic Type	Used to search memberships for which a particular characteristic type is defined. **Note:** This field appears when the **Membership Details** or **Person Details** option is selected from the **Search By** list. The list includes only those characteristic types where the characteristic entity is set to **Membership**.	Yes (Conditional) **Note:** This field is required when you are searching for a membership using a characteristic.
Characteristic Value	Used to search memberships with a particular characteristic value. **Note:** This field appears when the characteristic type is selected. If you select a predefined characteristic type, the **Search** (🔍) icon appears corresponding to the **Characteristic Value** field. On clicking the **Search** icon, the **Predefined Characteristic Search** window appears. On specifying the value for a predefined characteristic type, the description of the characteristic value appears corresponding to the **Characteristic Value** field.	Yes (Conditional) **Note:** This field is required when you are searching for a membership using a characteristic.
Policy ID	Used to search memberships which belong to the plans of a particular policy. **Note:** The **Search**(🔍) icon appears corresponding to this field. On clicking the **Search** icon, the **Policy Search** window appears. This field appears when the **Policy Plan Details** option is selected from the **Search By** list.	No
Price Item	Used to search memberships of a particular plan which is directly associated with price item. **Note:** The **Search** (🔍) icon appears corresponding to this field. On clicking the **Search** icon, the **Price Item Search** window appears. This field appears when the **Policy Plan Details** option is selected from the **Search By** list.	No
Plan ID	Used to search memberships of a particular plan.	No

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The **Search** (🔍) icon appears corresponding to this field. On clicking the **Search** icon, the **Policy Plan Search** window appears. This field appears when the **Policy Plan Details** option is selected from the **Search By** list.	
Person Name	Used to search memberships with a particular member person. **Note:** This field appears when the **Person Details** option is selected from the **Search By** list.	No
Relationship Type	Used to search memberships where the member person is related to the main subscriber. **Note:** This field appears only when the **Person Details** option is selected from the **Search By** list. The list includes only those contract relationship types which are already defined in the system.	No
Person Identifier Type	Used to search memberships which are associated with a person identifier type. **Note:** This field appears when the **Person Details** option is selected from the **Search By** list.	No
Person Identifier	Used to search memberships with a particular person identifier. **Note:** This field appears when the **Person Details** option is selected from the **Search By** list.	No
Health Plan	Used to search memberships associated with a particular health plan. **Note:** The **Search** (🔍) icon appears corresponding to this field. On clicking the **Search** icon, the **Health Plan Search** window appears. This field appears when the **Health Plan Details** option is selected from the **Search By** list. You can only search the individual memberships, if you are specifying a health plan.	No

Note: You must specify at least one search criteria while searching for a membership.

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- **Search Results** - On clicking the **Search** button, the search results appear based on the specified search criteria. The **Search Results** section contains the following columns:

Column Name	Column Description
Membership Information	Displays information about the membership.
	Note: It has a link. On clicking the link, the **Membership Information** screen appears where you can view the details of the respective membership.
Policy Information	Indicates the policy of the plan to which the membership is added.
	Note: It has a link. On clicking the link, the **Policy** screen appears where you can view the details of the respective policy. This column appears when the **Membership Details** or **Policy Plan Details**, or **Person Details** option is selected from the **Search By** list.
Price Item Information	Indicates the price item which is directly associated with the plan to which the membership belongs.
	Note: It has a link. On clicking the link, the **Price Item** screen appears where you can view the details of the respective price item. This column appears when the **Membership Details** or **Policy Plan Details**, or **Person Details** option is selected from the **Search By** list.
Health Plan	Indicates the health plan to which the membership is associated.
	Note: This column appears when the **Membership Details** or **Person Details**, or **Health Plan Details** option is selected from the **Search By** list. This column appears only when you are searching for an individual membership.
Start Date	Displays the date from when the membership is effective.
End Date	Displays the date till when the membership is effective.
Status	Indicates the status of the membership. The valid values are: • Active • Inactive • Terminated
Person Information	Indicates the person who is added to the membership. In addition, this column has a context menu which helps in navigating to other screens in the application.

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<table>
<tr><th>Column Name</th><th>Column Description</th></tr>
<tr><td></td><td>Note:
It has a link. On clicking the link, the Person screen appears where you can view the details of the respective person.
This column appears when the Person Details option is selected from the Search By list.</td></tr>
<tr><td>Main Subscriber</td><td>This column displays different data depending on whether you search for a membership using the policy plan, membership, or person details. The following table describes this column:
<table>
<tr><th>If you search for a membership using...</th><th>Then...</th></tr>
<tr><td rowspan="2">The Policy Plan Details or Membership Details option</td><td>The Main Subscriber column displays the information about the person who is the main subscriber of the membership. In addition, this column has a context menu which helps in navigating to other screens in the application.</td></tr>
<tr><td>Note: It has a link. On clicking the link, the Person screen appears where you can view the details of the respective person.</td></tr>
<tr><td>The Person Details option</td><td>The Main Subscriber column indicates whether the person is the main subscriber of the membership. The valid values are:
• Yes
• No</td></tr>
</table></td></tr>
<tr><td>Membership Type</td><td>Indicates the type of membership. The valid values are:
• COBRA
• Medicare
• Retiree</td></tr>
<tr><td>Benefit</td><td>On clicking the Benefit (🔗) icon, the Benefit screen appears where you can view the membership benefit of the member person who belong to the membership.
Note: The Benefit icon appears when a membership benefit is defined for a member person who belongs to the membership.</td></tr>
</table>

Note: Pagination is used to display limited number of records in the **Search Results** section. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

Related Topics

For more information on...	See...
How to search for a membership	Searching for a Membership on page 293

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For more information on...	See...
How to view the details of a membership	Viewing the Membership Details on page 293

Searching for a Membership

Prerequisites

To search for a membership, you should have:

- Membership types, membership identifier, and membership identifier types defined in the application
- Health plan defined in the application

> **Note:** You must define a health plan only when you want to search individual memberships.

- Benefit types and benefit sub types defined in the application
- Person, person identifier, and person identifier types defined in the application
- Price item, policy, and policy plan defined in the application
- Contract relationship types defined in the application
- Characteristic types defined in the application (where the characteristic entity is set to **Membership**)

Procedure

To search for a membership:

1. Click the **Menu** link in the **Application** toolbar.
   A list appears.
2. From the **Main** menu, select **Customer Management** and then click **Membership**.
   A sub-menu appears.
3. Click the **Search** option from the **Membership** sub-menu
   The **Membership** screen appears.
4. Enter the search criteria in the **Search Membership** zone.

> **Note:** ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.

5. Click **Search**.
   A list of memberships that meet the search criteria appears in the **Search Results** section.

Related Topics

For more information on...	See...
Membership screen	Membership (Used for Searching) on page 286
Search Membership zone	Search Membership on page 286

Viewing the Membership Details

Procedure

To view the details of a membership:

1. Search for the membership in the **Membership** screen.

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2. In the **Search Results** section, click the link in the **Membership Information** column corresponding to the *m*embership whose details you want to view.
   The **Membership** screen appears.
3. Ensure that the **Main** tab is selected.
4. View the details of the membership in the **Membership** zone.

Related Topics

For more information on...	
How to search for a membership	Searching for a Membership on page 293
Membership screen	Membership (Used for Viewing) on page 298
Membership zone	Membership on page 299

Defining a Membership for a Fully-Insured Group Policy Plan

Prerequisites

To define a membership for a fully-insured group policy plan, you should have:

- Policy and policy plan defined in the application.
- Person, person identifier, and person identifier types defined in the application.
- Characteristic types where the characteristic entity is set to **Policy Plan** and **Membership Person**.
- Membership and membership identifier types defined in the application.
- Values defined for the **MEMBERSHIP_TYPE_FLG** lookup field.
- Contract relationship types defined in the application.

Procedure

To define a membership for a fully-insured group policy plan:

1. Do either of the following:

If you want to...	**Then...**
Define a membership for a fully-insured group policy plan from the Policy screen	**a.** Search for the fully-insured group policy in the **Policy** screen. **b.** In the **Search Results** section, click the link in the **Policy Information** column corresponding to the policy *w*hose details you want to edit. The **Policy** screen appears. **c.** Click the **Plan** tab. The **Plan** tab appears. **d.** In the **Plans** zone, click the **Broadcast** (ᯤ) icon corresponding to the policy plan for which you want to define a membership. The **Memberships** zone appears. **e.** Click the **Add** link in the upper right corner of the **Memberships** zone.
Define a membership for a fully-insured group policy plan from the Membership screen	**a.** Click the **Menu** link in the **Application** toolbar. A list appears. **b.** From the **Main** menu, select **Customer Management** and then click **Membership**. A sub menu appears. **c.** Click the **Add** option from the **Membership** sub-menu.

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The **Select Business Object** screen appears. It contains the following field:

Field Name	Field Description	Mandatory (Yes or No)
Membership Business Object	Used to indicate the business object using which you want to create a fully-insured individual membership or fully-insured group membership.	Yes

Note: The **Select Business Object** screen appears when there are multiple membership business objects defined in the application. If there is only one membership business object defined in the application, the **Membership** screen appears.

The **Membership** screen appears. It contains the following sections:

- **Main** - Used to specify the basic details about the membership.
- **Membership Identifiers** - Used to define the identifiers for the membership.
- **Characteristics** - Used to define the characteristics for the membership.

The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Plan Information	Used to indicate the fully-insured group policy plan for which you want to create the membership. **Note:** The **Search**(🔍) icon appears corresponding to this field. On clicking the **Search** icon, the **Policy Plan Search** window appears. On specifying the policy plan, the description of the policy plan appears corresponding to the **Plan Information** field. If you are defining a membership for a fully-insured group policy plan through the **Plan** tab, then the respective plan ID associated with the fully-insured group policy appears in the **Plan Information** field.	Yes
Start Date	Used to specify the date from when the membership is effective for a fully-insured group policy plan. **Note:** The membership start date cannot be later than the membership end date. The membership start date cannot be earlier than the policy plan start date or later than policy plan end date.	Yes
End Date	Used to specify the date till when the membership is effective for a fully-insured group policy plan.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The membership end date cannot be earlier than the membership start date. The membership end date cannot be earlier than the policy plan start date or later than policy plan end date.	
Membership Type	Used to indicate the type of membership. The valid values are: • COBRA • Medicare • Retiree **Note:** If you want to define an active employee coverage membership, you must leave this field blank.	No
Main Subscriber	Used to indicate the person who is the main subscriber of the membership. **Note:** The **Search**(🔍) icon appears corresponding to this field. On clicking the **Search** icon, the **Person Search** window appears. On specifying the person, the description of the person appears corresponding to the **Main Subscriber** field.	Yes
Relationship Type	Used to indicate how the main subscriber is related to the membership.	No
External Membership ID	Used to specify the external membership ID. **Note:** Here, you need to specify a membership ID which is maintained in the external source system.	No

Tip: Alternatively, you can access this screen by clicking the **Add** button in the **Page Title** area of the **Membership** screen.

2. Enter the required details in the **Main** section.
3. Define characteristics for the membership, if required.
4. Click the **Save**.
   The membership is defined for the fully-insured group policy plan. The status of the membership and the main subscriber is set to **Active**.

Related Topics

For more information on...	See...
How to search for a fully-insured group policy	Searching for a Policy on page 239
Policy screen	Policy (Used for Viewing) on page 247
Plans zone	Plans on page 254

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For more information on...	See...
Memberships zone	Memberships on page 256
Membership screen	Membership (Used for Searching) on page 286
How to define a characteristic for a membership	Defining a Characteristic for a Membership on page 297
How to define a membership identifier type for a membership	Defining a Membership Identifier Type on page 44

Defining a Characteristic for a Membership

Prerequisites

To define a characteristic for a membership, you should have:

- Characteristic types defined in the application (where the characteristic entity is set to **Membership**)

Procedure

To define a characteristic for a membership:

1. Ensure that the **Characteristics** section is expanded when you are defining or editing a membership.

   The **Characteristics** section contains the following fields in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Effective Date	Used to specify the date from when the characteristic is effective for the membership. **Note:** The effective date cannot be earlier than the membership start date and later than the membership end date.	Yes (Conditional) **Note:** This field is required when you are defining a characteristic for the membership.
Characteristic Type	Used to indicate the characteristic type. **Note:** The list includes only those characteristic types where the characteristic entity is set to **Membership**	Yes (Conditional) **Note:** This field is required when you are defining a characteristic for the membership.
Characteristic Value	Used to specify the value for the characteristic type. **Note:** If you select a predefined characteristic type, the **Search** (🔍) icon appears corresponding to the **Characteristic Value** field. On clicking the **Search** icon, the **Predefined Characteristic Search** window appears. On specifying the value for a predefined characteristic type, the description of the characteristic value appears corresponding to the **Characteristic Value** field.	Yes (Conditional) **Note:** This field is required when you are defining a characteristic for the membership.

2. Enter the required details in the **Characteristics** section.
3. If you want to define more than one characteristic for the membership, click the **Add** (+) icon and then *r*epeat step 2.

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> **Note:** However, if you want to remove a characteristic from the membership, click the **Delete** (🗑) icon corresponding to the characteristic.

4. Click **Save**.
   The characteristics are defined for the membership.

Related Topics

For more information on...	See...
How to define a membership for a fully-insured group policy plan	Defining a Membership for a Fully-Insured Group Policy Plan on page 294
How to edit a membership of a fully-insured group policy plan	Editing a Membership of a Fully-Insured Group Policy Plan on page 317

Membership (Used for Viewing)

The **Membership** screen allows you to:

- View the details of a membership
- Edit the details of a membership
- Inactivate a membership
- Inactivate a member person
- Add or remove a person from a membership
- View the other plans of the main subscriber
- Associate or disassociate a contract from a membership
- View the billable charges created for a membership
- View the bill segments generated for a membership billable charge
- View the timeline details of a membership billable charge
- Viewing the pricing calculation details of a timeline
- View the log of a membership
- Add a log entry for a membership

It consists of the following tabs:

- Membership - Main on page 298
- Membership - Charges on page 305
- Membership - Log on page 316

Membership - Main

The **Main** tab displays information about the membership. It also lists the persons which are included in the membership and other plans (within or across policies) where the main subscriber is associated. It contains the following zones:

- Membership on page 299
- Membership Characteristics on page 303
- Member Persons on page 303
- Member Person Characteristics on page 304
- Other Plans of Main Subscriber on page 305

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Membership

The **Membership** zone displays the details of the membership. It contains the following sections:

- **Main** - Displays basic information about the membership. It contains the following fields:

Field Name	Field Description
Membership	Displays information about the membership.
Health Plan	Displays the health plan for which the main subscriber has enrolled.
	Note: It has a link. On clicking the link, the **Health Plan 360° Information** screen appears where you can view the details of the respective health plan. This field appears only when a membership is created using the **Individual Membership (C1-IndividualMembership)** business object.
Policy Information	Displays information about the policy.
	Note: It has a link. On clicking the link, the **Policy** screen appears where you can view the details of the respective policy.
Plan Information	Displays the policy plan for which the membership is defined.
	Note: It has a link. On clicking the link, the **Policy Plan** screen appears where you can view the details of the respective policy plan.
Status	Indicates the status of the membership. The valid values are: • Active • Canceled • Draft • Pending Effectuation • Terminated
Start Date	Displays the date from when the membership is effective.
End Date	Displays the date till when the membership is effective.
Membership Type	Indicates the type of membership. The valid values are: • COBRA • Medicare • Retiree
External Membership ID	Displays the corresponding membership ID which is maintained in the external source system.
Paid Through Date	Indicates the term end date of the last fully or partially paid term. The system considers the term to be fully paid when the threshold limit is met.

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<table>
<tr><th>Field Name</th><th>Field Description</th></tr>
<tr><td></td><td>
Note:
This field appears when the paid through date is calculated at the membership level.
The paid through date is calculated while freezing or canceling a payment or adjustment depending on whether the required algorithm is attached to the respective system event:
<table>
<tr><th>Entity</th><th>System Event</th><th>Algorithm</th></tr>
<tr><td>Customer Class</td><td>Payment Freeze</td><td>C1-PSPTDCAL</td></tr>
<tr><td>Customer Class</td><td>Payment Cancellation</td><td>C1-PXPTDCAL</td></tr>
<tr><td>Adjustment Type</td><td>Adjustment Freeze</td><td>C1-ADPTDCAL</td></tr>
<tr><td>Adjustment Type</td><td>Adjustment Cancellation</td><td>C1-AXPTDCAL</td></tr>
</table>
The following table indicates when the paid through date is calculated at the policy and/or membership level:
<table>
<tr><th>If the Paid Through Date Calculation Level parameter is set to…</th><th>If the following characteristics are defined for the bill charge or adjustment…</th><th>Then…</th></tr>
<tr><td>P</td><td>C1-POLID</td><td>Paid through date is calculated at the policy level</td></tr>
<tr><td>P</td><td>C1-MPID</td><td>Paid through date is calculated at the policy level</td></tr>
<tr><td>P</td><td>C1-POLID and C1-MPID</td><td>Paid through date is calculated at the policy level</td></tr>
<tr><td>M</td><td>C1-POLID</td><td>Paid through date is not calculated at the membership level</td></tr>
<tr><td>M</td><td>C1-MPID</td><td>Paid through date is calculated at the membership level</td></tr>
<tr><td>M</td><td>C1-POLID and C1-MPID</td><td>Paid through date is calculated at the membership level</td></tr>
<tr><td>P, M</td><td>C1-POLID</td><td>Paid through date is calculated at the policy level</td></tr>
<tr><td>P, M</td><td>C1-MPID</td><td>Paid through date is calculated at both the policy and membership levels</td></tr>
<tr><td>P, M</td><td>C1-POLID and C1-MPID</td><td>Paid through date is calculated at both the policy and membership levels</td></tr>
</table>
</td></tr>
</table>

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Field Name	Field Description
Automatic Renewal	Indicates whether the individual membership should be automatically renewed or not. **Note:** This field appears only when a membership is created using the **Individual Membership (C1-IndividualMembership)** business object.
Exchange	Indicates whether the individual membership is purchased from the exchange. The valid values are • On • Off **Note:** This field appears only when a membership is created using the **Individual Membership (C1-IndividualMembership)** business object.
Exchange ID	Displays the identification number of the exchange from where the individual membership is purchased. **Note:** This field appears only when a membership is created using the **Individual Membership (C1-IndividualMembership)** business object.
Renewal Period	Displays the period (i.e. number of months) for which you want to automatically renew the individual membership. **Note:** This field appears only when a membership is created using the **Individual Membership (C1-IndividualMembership)** business object.
Reprice After Date	Displays the date after which repricing must take place for the individual membership. **Note:** This field appears only when a membership is created using the **Individual Membership (C1-IndividualMembership)** business object.
Status Reason	Indicates the reason why the status of the individual membership is changed. **Note:** This field appears only when a membership is created using the **Individual Membership (C1-IndividualMembership)** business object.

- **Record Actions** - This section contains the following buttons:

Button Name	Button Description
Edit	Used to edit the details of the membership. **Note:** The **Edit** button appears when the membership is in the **Active**, **Canceled**, or **Terminated** status.
Inactivate	Used to inactivate the membership.

- **Record Information** - This section contains the following fields:

Field Name	Field Description
Business Object	Indicates the business object using which the membership is created. In addition, this column has a context menu which helps in navigating to other screens in the application.

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Field Name	Field Description
	Note: It has a link. On clicking the link, the **Business Object** screen appears where you can view the details of the respective business object.
Status Date/Time	Displays the date and time when the membership status is updated
Create Date/Time	Displays the date and time when the membership is created.

- **Associated Membership** - This section displays the another individual membership that is associated with the individual membership for the add-on health insurance plan. This section contains the following fields:

Field Name	Field Description
Membership Identifier Type	Displays the membership identifier type of the associated individual membership.
Membership Identifier	Displays the membership identifier value of the associated individual membership.

Note: This section appears when you are viewing the details of an individual membership.

- **Binder Payment Details** - This section displays the binder payment details for an individual membership. This section contains the following fields:

Field Name	Field Description
Binder Payment Applicability	Indicates whether the binder payment is received or not before activating the individual membership.
Grace Days	Displays the grace date that is calculated for the individual membership.
Threshold Percentage	Displays the threshold percentage using which the threshold amount is calculated.
Binder Liability Amount	Displays the binder liability amount.
Threshold Amount	Displays the amount which is calculated for the binder payment using the binder liability amount and threshold percentage.
Hold Billing	Indicates whether you want to hold the bill generation process for the individual membership until the binder payment is received.

Note: This section appears when you are viewing the details of an individual membership.

- **Membership Identifiers** - This section contains the following fields:

Column Name	Column Description
Membership Identifier Type	Displays the membership identifier type.
Membership Identifier	Displays the value of the membership identifier.

Related Topics

For more information on...	See...
How to edit a membership of a fully-insured group policy plan	Editing a Membership of a Fully-Insured Group Policy Plan on page 317
How to inactivate a membership	Inactivating a Membership

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Membership Characteristics

The **Membership Characteristics** zone lists the characteristics of the membership. It contains the following columns:

Column Name	Column Description
Effective Date	Displays the date from when the characteristic is effective for the membership.
Characteristic Type	Indicates the characteristic type.
Characteristic Value	Displays the value of the characteristic type.
Description	Displays the description of the characteristic value. **Note:** The data appears in this column when the type of characteristic value is set to **Predefined Value**.

You can filter the list using the **Effective Date** field available in the **Filter** area. By default, the **Filter** area is hidden. You can view the **Filter** area by clicking the **Filters** (▽) icon in the upper right corner of this zone.

Member Persons

The **Member Persons** zone lists the persons who are added to the membership. It contains the following columns:

Column Name	Column Description
Start Date	Displays the date from when the person is added to the membership.
End Date	Displays the date till when the person is added to the membership.
Person	Indicates the person who is added to the membership. In addition, it has the context menu which helps in navigating to other screens in the application. **Note:** It has a link. On clicking the link, the **Person** screen appears where you can view the details of the respective person.
Relationship Type	Indicates how the person is related to the main subscriber.
Main Subscriber	Indicates whether the person is the main subscriber of the membership. The valid values are: • Yes • No
Financially Responsible	Indicates whether the person is financially responsible for the membership. The valid values are: • Yes • No
Status	Indicates the status of the person in the membership. The valid values are: • Active • Inactive • Canceled • Pending Effectuation
Status Reason	Indicates the reason why the status of the member person is changed.

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Column Name	Column Description
	Note: This field appears only when a membership is created using the **Individual Membership** (i.e.,**C1-IndividualMembership**) business object.
Member	Indicates the identity of the person in the membership. The valid values are: • Yes • No
External Medicare Beneficiary ID	Displays the medicare beneficiary identifier of the person who has availed the membership benefit.
Date of Birth	Displays the date when the person was born.
Edit	On clicking the **Edit** (✎) icon, the **Member Person** screen appears where you can edit the membership details of the respective person.

Note:

By default, the **Member Persons** zone displays those member persons which are in **Active** status.

You can add a person to the membership by clicking the **Add Person** link in the upper right corner of this zone.

On clicking the **Broadcast** (📡) icon corresponding to a member person, the **Member Person Characteristics** zone appears where you can view the characteristics of the respective member person.

You can filter the list using various search criteria (such as, **Status** and **Status Reason**) available in the Filter area. By default, the **Filter** area is hidden. You can view the **Filter** area by clicking the **Filters** (▽) icon in the upper right corner of this zone.

You can change the layout of this zone. For more information on how to change the layout, see Changing the Layout on page 4410.

Related Topics

For more information on...	See...
How to add a person to a membership	Adding a Person to a Membership on page 318
How to edit the membership details of a person	Editing the Membership Details of a Person on page 322
How to inactivate a member person of a membership	Inactivating a Member Person on page 321
How to view the characteristics of a member person	Viewing the Characteristics of a Member Person on page 328
Member Person Characteristics zone	Member Person Characteristics on page 304

Member Person Characteristics

The **Member Person Characteristics** zone lists the characteristics of the member person who is added to the membership. It contains the following columns:

Column Name	Column Description
Effective Date	Displays the date from when the characteristic is effective for the member person.
Characteristic Type	Indicates the characteristic type.

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Column Name	Column Description
Characteristic Value	Displays the value of the characteristic type.
Description	Displays the description of the characteristic value.
	Note: The data appears in this column when the type of characteristic value is set to **Predefined Value**.

By default, the **Member Person Characteristics** zone does not appear in the **Main** tab. It appears when you click the **Broadcast** ( ) icon corresponding to the member person in the **Member Persons** zone.

You can change the layout of this zone. For more information on how to change the layout, see Changing the Layout on page 4410.

Other Plans of Main Subscriber

The **Other Plans of Main Subscriber** zone lists the additional memberships of the main subscriber. These memberships may belong to different plans within or across the policies. It contains the following columns:

Column Name	Column Description
Start Date	Displays the date from when the main subscriber is added to the membership.
End Date	Displays the date till when the main subscriber is added to the membership.
Policy Plan Number	Displays the fully-insured group policy plan for which the membership is created.
Health Plan Description	Displays the description of the health plan associated with the membership.
Membership	Displays information about the membership.
	Note: It has a link. On clicking the link, the **Membership** screen appears where you can view the details of the respective membership.
Last Billed Coverage	Indicates the last bill segment generated for the membership which is in the **Frozen** status. In addition, a context menu appears corresponding to this column which helps in navigating to other screens in application.

Related Topics

For more information on...	See...
How to add a person to a membership	Adding a Person to a Membership on page 318
How to edit the membership details of a person	Editing the Membership Details of a Person on page 322
How to remove a person from a membership	Removing a Person from a Membership on page 324
How to inactivate a member person of a membership	Inactivating a Member Person on page 321

Membership - Charges

The **Charges** tab lists the following:

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- Contracts associated with the membership
- Billable charges created for the membership
- Bill segments generated for each billable charge
- Timeline generated for each billable charge
- Premium calculated for each eligible member person when an age based pricing is used during the membership premium calculation
- Premium calculated for the membership when a tier based pricing is used during the membership premium calculation
- Sponsor Billable Charges created for the membership
- Sponsor Bill Segment Details generated for each sponsor billable charge
- Timeline Details generated for each Sponsor Billable Charge
- Premium calculated for each member based on sponsor pricing details

It contains the following zones:

- Membership Contracts on page 306
- Billable Charges on page 307
- Bill Segment Details on page 308
- Billable Charge Timeline Details on page 309
- Pricing Calculation Details on page 310

Membership Contracts

The **Membership Contracts** zone lists the contracts which are associated with the membership. It contains the following columns:

Column Name	Column Description
Start Date	Displays the date from when the contract is associated with the membership.
End Date	Displays the date till when the contract is associated with the membership.
Bill To	Indicates the entity against whom the corresponding charges are billed. The valid values are: • Federal • State • Group • Individual
Contract ID	Displays the contract ID. **Note:** It has a link. On clicking the link, the **Contract** screen appears where you can view the details of the respective contract.
Account Information	Indicates the account for which the contract is created. In addition, this column has a context menu which helps in navigating to other screens in the application. **Note:** It has a link. On clicking the link, the **Account** screen appears where you can view the details of the respective account.
Delete	On clicking the **Delete** (🗑) icon, you can disassociate the contract from the membership.
Edit	On clicking the **Edit** (✎) icon, the **Associate Contract with Membership** screen appears where you can edit the contract association details of the membership.

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Note: Pagination is used to display limited number of records in this zone. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

You can associate a contract with the membership by clicking the **Add Contract** link in the upper-right corner of this zone.

You can filter the list using the **Bill To** field available in the **Filter** area. By default, the **Filter** area is hidden. You can view the **Filter** area by clicking the **Filters** (▽) icon in the upper-right corner of this zone.

Related Topics

For more information on...	See...
How to associate a contract with a membership	Associating a Contract with a Membership on page 325
How to edit the contract association details of a membership	Editing the Contract Association Details of a Membership on page 327
How to disassociate a contract from a membership	Disassociating a Contract from a Membership on page 326

Billable Charges

The **Billable Charges** zone lists the one-time or recurring billable charges which are created for the membership. It contains the following columns:

Column Name	Column Description
Start Date	Displays the start date of the billable charge.
End Date	Displays the end date of the billable charge.
Bill Period	Indicates the intervals at which the recurring bill segments must be created for the billable charge.
Price Item Information	Indicates the price item for which the billable charge is created. **Note:** It has a link. On clicking the link, the **Price Item** screen appears where you can view the details of the respective price item.
Account ID	Indicates the account for which the billable charge is created. **Note:** It has a link. On clicking the link, the **Account** screen appears where you can view the details of the respective account.
Contract ID	Indicates the contract against which the billable charge is created. **Note:** It has a link. On clicking the link, the **Contract** screen appears where you can view the details of the respective contract.
Billable Charge Information	Displays information about the billable charge. **Note:** It has a link. On clicking the link, the **Billable Charge** screen appears where you can view the details of the respective billable charge.
Amount	Displays the billable charge amount.
Status	Indicates the status of the billable charge. The valid values are: • Billable

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Column Name	Column Description
	• Cancelled
Last Billed Coverage	Indicates the last bill segment generated for the billable charge which is in the **Frozen** status. In addition, a context menu appears corresponding to this column which helps in navigating to other screens in application.
	Note: It has a link. On clicking the link, the **Bill Segment** screen appears where you can view the details of the respective bill segment.

Note: Pagination is used to display limited number of records in this zone. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

On clicking the **Broadcast** (📡) icon corresponding to a billable charge, the **Bill Segment Details** and **Billable Charge Timeline Details** zones appear.

Note: On clicking the **Broadcast** (📡) icon, the **Billable Charge Timeline Details** zone appears when the timeline details are available for the respective billable charge.

You can filter the list using various search criteria (such as, **Price Item**, **Start Date**, **Contract ID**, **End Date** and **Status**) available in the **Filter** area. By default, the **Filter** area is hidden. You can view the **Filter** area by clicking the **Filters** (▽) icon in the upper right corner of this zone.

Related Topics

For more information on...	See...
How to view the billable charges created for a membership	Viewing the Billable Charges Created for a Membership on page 329
Bill Segment Details zone	Bill Segment Details on page 308
Billable Charge Timeline Details zone	Billable Charge Timeline Details on page 309

Bill Segment Details

The **Bill Segment Details** zone lists all bill segments which are generated for the billable charge. It contains the following columns:

Column Name	Column Description
Start Date	Displays the start date of the bill segment.
End Date	Displays the end date of the bill segment.
Bill Segment Information	Displays information about the bill segment. In addition, this column has a context menu which helps in navigating to other screens in the application.
	Note: It has a link. On clicking the link, the **Billable Segment** screen appears where you can view the details of the respective bill segment.
Billed Amount	Displays the bill segment amount.
Status	Indicates the status of the bill segment. The valid values are: • Canceled • Freezable • Frozen • Incomplete

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Column Name	Column Description
	• Error • Pending Cancel
Bill Information	Indicates the bill in which the bill segment is created. In addition, this column has a context menu which helps in navigating to other screens in the application.
	Note: It has a link. On clicking the link, the **Bill** screen appears where you can view the details of the respective bill.

Note: Pagination is used to display limited number of records in this zone. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

By default, the **Bill Segment Details** zone does not appear in the **Charges** tab of the **Membership** screen. It appears when you click the **Broadcast** (ᯤ) icon corresponding to a billable charge in the **Billable Charges** zone.

You can filter the list using various search criteria (such as, **Start Date**, **Status**, and **End Date**) available in the **Filter** area. By default, the **Filter** area is hidden. You can view the **Filter** area by clicking the **Filters** (⧩) icon in the upper right corner of this zone.

Related Topics

For more information on...	See...
How to view the billable segments generated for a billable charge	Viewing the Bill Segments Generated for a Membership Billable Charge on page 329
Billable Charges zone	Billable Charges on page 307

Billable Charge Timeline Details

The **Billable Charge Timeline Details** zone lists the timelines which are derived during the membership premium calculation. It appears when the timeline details are available for the billable charge. It contains the following columns:

Column Name	Column Description
Start Date	Displays the start date of the timeline.
End Date	Displays the end date of the timeline.
Amount	Displays the premium amount calculated for the timeline.
Pricing Rule Information	Indicates the pricing rule using which the premium amount is calculated.
	Note: It has a link. On clicking the link, the **Pricing Rule** screen appears where you can view the details of the respective pricing rule.
Pricing Rule Type	Indicates the pricing rule type using which the pricing rule is created.
	Note: It has a link. On clicking the link, the **Pricing Rule Type** screen appears where you can view the details of the respective pricing rule type.

Note: Pagination is used to display limited number of records in this zone. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

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By default, the **Billable Charge Timeline Details** zone does not appear in the **Contracts and Charges** tab of the **Membership** screen. It appears when you click the **Broadcast** (ᯤ) icon corresponding to a billable charge in the **Billable Charges** zone.

On clicking the **Broadcast** (ᯤ) icon corresponding to a timeline, the **Pricing Calculation Details** zone appears.

You can filter the list using various search criteria (such as, **Start Date** and **End Date**) available in the **Filter** area. By default, the **Filter** area is hidden. You can view the **Filter** area by clicking the **Filters** (⧩) icon in the upper right corner of this zone.

Related Topics

For more information on...	See...
How to view the timeline details of a membership billable charge	Viewing the Timeline Details of a Membership Billable Charge on page 330
Billable Charges zone	Billable Charges on page 307
Pricing Calculation Details zone	Pricing Calculation Details on page 310
How the timeline is derived during the membership premium calculation	Membership Premium Calculation on page 3484

Pricing Calculation Details

The **Pricing Calculation Details** zone indicates how the amount is calculated for the timeline. If the age based pricing is used during the membership premium calculation, this zone lists the premium calculated for each eligible member of the membership. It also displays the base fee and modifier fee which are applicable for each eligible member. However, if the tier based pricing is used during the membership premium calculation, this zone lists the premium calculated at the membership level. It contains the following columns:

Column Name	Column Description
Entity Information	If the age based pricing is used during the membership premium calculation, this column indicates the eligible member for whom the premium amount is calculated. However, if the tier based pricing is used during the membership premium calculation, this column indicates the main subscriber of the membership.
Description on Bill	Displays the description of the rate component for which the price component is created in the age based or tier based pricing.
Pricing Parameter	Indicates the pricing eligibility criteria which is satisfied while deriving the base fee.
Amount	Displays the base fee or applicable modifier fee.
Proration Factor	Indicates the proration factor which is derived using the proration rules defined for the fully-insured group policy plan. **Note:** The data appears in this column when the proration rule for the respective event is defined for the fully-insured group policy plan.
Distributed Amount	Displays the premium amount which is calculated for the non-skip billing periods.

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Column Name	Column Description
	Note: The data appears in this column when the **9/10 Billing (Skip Months)** feature is enabled for the account. If the age based pricing is used during the membership premium calculation, this column displays the distributed amount for the eligible member. However, if the tier based pricing is used during the membership premium calculation, this column displays the distributed amount for the membership.
No. of Billing Periods	Indicates the number of the non-skip billing periods of the account.
	Note: The data appears in this column when the **9/10 Billing (Skip Months)** feature is enabled for the account.
Total Contract Period Amount	Displays the premium which should be paid for the entire contract period (in other words, total premium for the skip and non-skip billing periods).
	Note: The data appears in this column when the **9/10 Billing (Skip Months)** feature is enabled for the account. If the age based pricing is used during the membership premium calculation, this column displays the total contract period amount for the eligible member. However, if the tier based pricing is used during the membership premium calculation, this column displays the total contract period amount for the membership.
Comments	Displays additional information about the premium calculation for an eligible member.
Total Amount	If the age based pricing is used during the membership premium calculation, this column displays the sum total of the base fee and modifier fee (if any) for the eligible member. However, if the tier based pricing is used during the membership premium calculation, this column displays the base fee applicable for the membership.

By default, the **Pricing Calculation Details** zone does not appear in the **Charges** tab of the **Membership** screen. It appears when you click the **Broadcast** (📡) icon corresponding to a timeline in the **Billable Charge Timeline Details** zone.

Related Topics

For more information on...	See...
How to view the pricing calculation details of a timeline	Viewing the Membership Pricing Calculation Details of a Timeline on page 330
Premium Proration Rules	Premium Proration Rules on page 3480

Sponsor Billable Charges

The **Sponsor Billable Charges** zone lists the one-time or recurring membership benefit billable charges which are created for the sponsor account. It contains the following columns:

Column Name	Column Description
Start Date	Displays the start date of the billable charge.

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Column Name	Column Description
End Date	Displays the end date of the billable charge.
Bill Period	Indicates the intervals at which the recurring bill segments must be created for the billable charge.
Price Item Information	Indicates the price item for which the billable charge is created. **Note:** It has a link. On clicking the link, the **Price Item** screen appears where you can view the details of the respective price item.
Account ID	Indicates the account for which the billable charge is created. **Note:** It has a link. On clicking the link, the **Account** screen appears where you can view the details of the respective account.
Person Name	Displays the person name for whom the billable charge is created.
Contract ID	Indicates the contract against which the billable charge is created. **Note:** It has a link. On clicking the link, the **Contract** screen appears where you can view the details of the respective contract.
Billable Charge Information	Displays information about the billable charge. **Note:** It has a link. On clicking the link, the **Billable Charge** screen appears where you can view the details of the respective billable charge.
Amount	Displays the billable charge amount.
Status	Indicates the status of the billable charge. The valid values are: • Billable • Cancelled
Last Billed Coverage	Indicates the last bill segment generated for the billable charge which is in the **Frozen** status. In addition, a context menu appears corresponding to this column which helps in navigating to other screens in application. **Note:** It has a link. On clicking the link, the **Bill Segment** screen appears where you can view the details of the respective bill segment.

Note: Pagination is used to display limited number of records in this zone. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

On clicking the **Broadcast** (📡) icon corresponding to a sponsor billable charge, the **Sponsor Bill Segment Details** and **Sponsor Billable Charge Timeline Details** zone appears.

Note: On clicking the **Broadcast** (📡) icon in the**Sponsor Billable Charges** zone, the**Sponsor Billable Charge Timeline Details** zone appears only when the timeline details are available for the respective sponsor billable charge.

You can filter the list using various search criteria (such as,**Price Item**, **Start Date**, **Contract ID**, **End Date**, and **Status**) available in the **Filter** area. By default, the **Filter** area is hidden. You can view the **Filter** area by clicking the **Filters** (🔽) icon in the upper right corner of this zone.

Related Topics

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For more information on...	See...
How to view the billable charges created for a membership benefit sponsor	Viewing the Billable Charges Created for a Membership Benefit Sponsor on page 331
Sponsor Bill Segment Details zone	Sponsor Bill Segment Details on page 313
Sponsor Billable Charge Timeline Details zone	Sponsor Billable Charge Timeline Details on page 314

Sponsor Bill Segment Details

The **Sponsor Bill Segment Details** zone lists all bill segments which are generated for the sponsor billable charge. It contains the following columns:

Column Name	Column Description
Start Date	Displays the start date of the bill segment.
End Date	Displays the end date of the bill segment.
Bill Segment	Displays information about the bill segment. In addition, this column has a context menu which helps in navigating to other screens in the application. **Note:** It has a link. On clicking the link, the **Bill Segment** screen appears where you can view the details of the respective bill segment.
Billed Amount	Displays the billed segment amount.
Status	Indicates the status of the bill segment. The valid values are: • Canceled • Freezable • Frozen
Bill Information	Indicates the bill in which the bill segment is created. In addition, this column has a context menu which helps in navigating to other screens in the application. **Note:** It has a link. On clicking the link, the **Bill** screen appears where you can view the details of the respective bill.

Note: Pagination is used to display limited number of records in this zone. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

By default, the **Sponsor Bill Segment Details** zone does not appear in the **Charges** tab of the **Membership** screen. It appears when you click the **Broadcast** (📡) icon corresponding to a sponsor billable charge in the **Sponsor Billable Charges** zone.

You can filter the list using various search criteria (such as, **Start Date**, **Status**, and **End Date**) available in the **Filter** area. By default, the **Filter** area is hidden. You can view the **Filter** area by clicking the **Filters** (▽) icon in the upper right corner of this zone.

Related Topics

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For more information on...	See...
How to view the bill segments generated for a membership benefit sponsor	Viewing the Bill Segments Generated for a Membership Benefit Sponsor on page 331
Sponsor Billable Charges zone	Sponsor Billable Charges on page 311

Sponsor Billable Charge Timeline Details

The **Sponsor Billable Charge Timeline Details** zone lists the timelines which are derived during the membership premium calculation. It appears when the timeline details are available for the sponsor billable charge. It contains the following columns:

Column Name	Column Description
Start Date	Displays the start date of the timeline.
End Date	Displays the end date of the timeline.
Amount	Displays the premium amount calculated for the timeline.
Pricing Rule Information	Indicates the pricing rule using which the premium amount is calculated.
	Note: It has a link. On clicking the link, the **Pricing Rule** screen appears where you can view the details of the respective pricing rule.
Pricing Rule Type	Indicates the pricing rule type using which the pricing rule is created.
	Note: It has a link. On clicking the link, the **Pricing Rule Type** screen appears where you can view the details of the respective pricing rule type.

Note: Pagination is used to display limited number of records in this zone. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

By default, the **Sponsor Billable Charge Timeline Details** zone does not appear in the **Charges** tab of the **Membership** screen. It appears when you click the **Broadcast** (ᯤ) icon corresponding to a sponsor billable charge in the **Sponsor Billable Charges** zone.

On clicking the **Broadcast** (ᯤ) icon corresponding to a timeline, the **Sponsor Pricing Calculation Details** zone appears.

You can filter the list using various search criteria (such as, **Start Date** and **End Date**) available in the **Filter** area. By default, the **Filter** area is hidden. You can view the **Filter** area by clicking the **Filters** (▽) icon in the upper right corner of this zone.

Related Topics

For more information on...	See...
How to view the timeline details of a sponsor billable charge	Viewing the Timeline Details of a Sponsor Billable Charge on page 332
Sponsor Billable Charges zone	Sponsor Billable Charges on page 311
Sponsor Pricing Calculation Details zone	Sponsor Pricing Calculation Details on page 315
How the timeline is derived during the membership premium calculation	Membership Premium Calculation on page 3484

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Sponsor Pricing Calculation Details

The **Sponsor Pricing Calculation Details** zone indicates how the amount is calculated for the timeline. If the age based pricing is used during the membership premium calculation, this zone lists the premium calculated for each eligible member of the membership. It also displays the base fee and modifier fee which are applicable for each eligible member. However, if the tier based pricing is used during the membership premium calculation, this zone lists the premium calculated at the membership level. It contains the following columns:

Column Name	Column Description
Entity Information	If the age based pricing is used during the membership premium calculation, this column indicates the eligible member for whom the premium amount is calculated. However, if the tier based pricing is used during the membership premium calculation, this column indicates the main subscriber of the membership.
Description on Bill	Displays the description of the rate component for which the price component is created in the age based or tier based pricing.
Pricing Parameter	Indicates the pricing eligibility criteria which is satisfied while deriving the base fee.
Amount	Displays the base fee or applicable modifier fee.
Proration Factor	Indicates the proration factor which is derived using the proration rules defined for the fully-insured group policy plan. **Note:** The data appears in this column when the proration rule for the respective event is defined for the fully-insured group policy plan.
Distributed Amount	Displays the premium amount which is calculated for the non-skip billing periods. **Note:** The data appears in this column when the **9/10 Billing (Skip Months)** feature is enabled for the account. If the age based pricing is used during the membership premium calculation, this column displays the distributed amount for the eligible member. However, if the tier based pricing is used during the membership premium calculation, this column displays the distributed amount for the membership.
No. of Billing Periods	Indicates the number of the non-skip billing periods of the account. **Note:** The data appears in this column when the **9/10 Billing (Skip Months)** feature is enabled for the account.
Total Contract Period Amount	Displays the premium which should be paid for the entire contract period (in other words, total premium for the skip and non-skip billing periods). **Note:** The data appears in this column when the **9/10 Billing (Skip Months)** feature is enabled for the account. If the age based pricing is used during the membership premium calculation, this column displays the total contract period amount for the eligible member. However, if the tier based pricing is used during the membership premium calculation, this column displays the total contract period amount for the membership.
Comments	Used to specify additional information about the sponsor account.

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Column Name	Column Description
Total Amount	If the age based pricing is used during the membership premium calculation, this column displays the sum total of the base fee and modifier fee (if any) for the eligible member. However, if the tier based pricing is used during the membership premium calculation, this column displays the base fee applicable for the membership.

By default, the **Sponsor Pricing Calculation Details** zone does not appear in the **Charges** tab of the **Membership** screen. It appears when you click the **Broadcast** (ᯤ) icon corresponding to a timeline in the **Sponsor Billable Charge Timeline Details** zone.

Related Topics

For more information on...	See...
How to view the sponsor pricing calculation details of a timeline	Viewing the Sponsor Pricing Calculation Details of a Timeline on page 332
Premium Proration Rules	Premium Proration Rules on page 3480

Membership - Log

The **Log** tab contains the following zone:

- Membership Log on page 316

Membership Log

The **Membership Log** zone lists the complete trail of actions performed on the membership. It contains the following columns:

Column Name	Column Description
Creation Date Time	Displays the date and time when the action was performed on the membership.
Details	Displays the details about the action performed on the membership.
User	Indicates the user who has performed the action on the membership.
Log Type	Indicates the type of log.
Related Object	Indicates the object or entity which is generated when the action is performed on the membership. **Note:** It contains a link. On clicking the link, the screen appears where you can view the details of the respective related object.
Status Reason	Indicates the reason why the status of the membership is changed. **Note:** At present, no data appears in this column. The implementation team can build the custom logic to meet the business requirements.

Note: You can manually add a log entry for the membership by clicking the **Add Log Entry** link in the upper right corner of the **Membership Log** zone.

Related Topics

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For more information on...	See...
How to view the log of a membership	Viewing the Log of a Membership on page 333
How to add a log entry for a membership	Adding a Log Entry for a Membership on page 334

Editing a Membership of a Fully-Insured Group Policy Plan

Procedure

To edit a membership of a fully-insured group policy plan:

1. Search for the membership in the **Membership** screen.
2. In the **Search Results** section, click the link in the **Membership Information** column corresponding to the *m*embership whose details you want to edit.
   The **Membership** screen appears.
3. Ensure that the **Main** tab is selected.
4. Click the **Edit** button in the **Membership** zone.

   The **Membership** screen appears. It contains the following sections:

   - **Main** - Used to specify the basic details about the membership.
   - **Characteristics** - Used to define the characteristics for the membership.

   The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Membership Information	Displays information about the membership.	Not applicable
Policy Information	Displays information about the policy.	Not applicable
Plan Information	Indicates the policy plan for which the membership is defined.	Not applicable
Start Date	Used to specify the date from when the membership is effective for a fully-insured group policy plan. **Note:** The membership start date cannot be later than the membership end date. The membership start date cannot be earlier than the policy plan start date or later than policy plan end date.	Yes
End Date	Used to specify the date till when the membership is effective for a fully-insured group policy plan. **Note:** The membership end date cannot be earlier than the membership start date. The membership end date cannot be earlier than the policy plan start date or later than policy plan end date.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
Membership Type	Used to indicate the type of membership. The valid values are: • COBRA • Medicare • Retiree	No
External Membership ID	Used to specify the external membership ID. **Note:** Here, you need to specify a membership ID which is maintained in the external source system.	No

5. Modify the required details in the **Main** section.
6. Define, edit, or remove characteristics of the membership, if required.
7. Click **Save**.
   The changes made to the membership are saved.

Related Topics

For more information on...	See...
How to search for a membership	Searching for a Membership on page 293
Membership screen	Membership (Used for Viewing) on page 298
Membership zone	Membership on page 299
How to define a characteristic for a membership	Defining a Characteristic for a Membership on page 297

Adding a Person to a Membership

The system enables you to add a member person to a membership when the membership is in the **Active** status. However, you can only add a member person in the **Active** status and not in the **Inactive** status.

Prerequisites

To add a person to a membership, you should have:

- Required persons defined in the application
- Contract relationship types defined in the application

Procedure

To add a person to a membership:

1. Search for the membership in the **Membership** screen.
2. In the **Search Results** section, click the link in the **Membership Information** column corresponding to the *m*embership to which you want to add a person.
   The **Membership** screen appears.
3. Ensure that the **Main** tab is selected.
4. Click the **Add Person** link in the upper right corner of the **Member Persons** zone.

   The **Member Person** screen appears. It contains the following sections:

   - **Main** - Used to specify the basic membership details of the person.
   - **Characteristics** - Used to define the characteristics for the member person.

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The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Membership Information	Indicates the membership to which you want to add a person.	Not applicable
Person ID	Used to indicate the person whom you want to add to the membership. **Note:** The **Search** (🔍) icon appears corresponding to this field. On clicking the **Search** icon, the **Person Search** window appears.	Yes
Relationship Type	Used to indicate how the person is related to the main subscriber. **Note:** The list includes only those contract relationship types which are already defined in the system.	Yes
Financially Responsible	Used to indicate whether the person is financially responsible for the membership.	No
Main Subscriber	Used to indicate whether the person is the main subscriber of the membership.	No
Member	Used to indicate whether the person is a member or a non-member in the membership.	No
Start Date	Used to specify the date from when you want to add the person to the membership. **Note:** The member person start date cannot be later than the member person end date. The member person start date cannot be earlier than the membership start date or later than the membership end date.	Yes
End Date	Used to specify the date till when you want to add the person to the membership. **Note:** The member person end date cannot be earlier than the member person start date. The member person end date cannot be earlier than the membership start date or later than the membership end date.	No
External Medicare Beneficiary ID	Used to specify the medicare beneficiary identifier of the person who has availed the medicare benefit.	No
Member Person Status	Used to indicate the status of the person in the membership. The valid values are: • Active • Inactive • Canceled	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	• Pending Effectuation **Note:** By default, the **Active** option is selected.	

5. Enter the required details in the **Main** section.
6. Define the characteristics for the member person, if required.
7. Click **Save**.
   The person is added to the membership.

Related Topics

For more information on...	See...
How to search for a membership	Searching for a Membership on page 293
Membership screen	Membership (Used for Viewing) on page 298
Member Persons zone	Member Persons on page 303
How to define a characteristic for a member person	Defining a Characteristic for a Member Person on page 320

Defining a Characteristic for a Member Person

Prerequisites

To define a characteristic for a member person, you should have:

- Characteristic types defined in the application (where the characteristic entity is set to **Membership Person**)

Procedure

To define a characteristic for a member person:

1. Ensure that the **Characteristics** section is expanded when you are adding a person to a membership or editing *t*he membership details of a person.

   The **Characteristics** section contains the following fields in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Effective Date	Used to indicate the date from when the characteristic is effective for the member person.	Yes (Conditional) **Note:** This field is required when you are defining a characteristic for the member person.
Characteristic Type	Used to indicate the characteristic type. **Note:** The list includes only those characteristic types where the characteristic entity is set to **Membership Person**.	Yes (Conditional) **Note:** This field is required when you are defining a characteristic for the member person.
Characteristic Value	Used to specify the value for the characteristic type.	Yes (Conditional)

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Field Name	Field Description	Mandatory (Yes or No)
	Note: If you select a predefined characteristic type, the **Search** (🔍) icon appears corresponding to the **Characteristic Value** field. On clicking the **Search** icon, the **Predefined Characteristic Search** window appears. On specifying the value for a predefined characteristic type, the description of the characteristic value appears corresponding to the **Characteristic Value** field.	**Note:** This field is required when you are defining a characteristic for the member person.
Description	Used to specify the description for the characteristic value.	Yes (Conditional) **Note:** This field is required when you are defining a characteristic for the member person.

2. Enter the required details in the **Characteristics** section.
3. If you want to define more than one characteristic for the member person, click the **Add** (+) icon and then *r*epeat step *2*.

Note: However, if you want to remove a characteristic from the member person, click the **Delete** (🗑) icon corresponding to the characteristic.

4. Click **Save**.
   The characteristics are defined for the member person.

Related Topics

For more information on...	See...
How to add a person to a membership	Adding a Person to a Membership on page 318
How to edit the membership details of a person	Editing the Membership Details of a Person on page 322

Inactivating a Member Person

The system enables you to inactivate a member person of a membership. If the member person is the main subscriber, the system automatically inactivates the membership and all other member persons which are included in the membership. It also does the following:

- Cancels the billable charges which are created for the membership
- Cancels the corresponding bill segments (if any)

If an audit event exists for the membership which is inactivated, the **BO_STATUS_CD** column corresponding to the record in the **C1_AUDIT_EVENT**, **C1_AUDIT_EVENT_LOG**, and **CI_PRCE_CALC** tables is set to **INVALID**. If a repricing entity detail record exists for the membership in the **PENDING** or **ERROR** status, then the **BO_STATUS_CD** column corresponding to the record in the **CI_REPRC_ENTITY_DTL** table is set to **COMPLETE**. If a repricing request exists for the membership in the **PENDING** or **ERROR** status, then the **BO_STATUS_CD** column corresponding to the record in the **CI_REPRC_REQ_DTL** table is set to **COMPLETE**.

Procedure

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To inactivate a member person of a membership:

1. Search for the membership in the **Membership** screen.
2. In the **Search Results** section, click the link in the **Membership Information** column corresponding to the *m*embership whose details you want to edit.
   The **Membership** screen appears.
3. Ensure that the **Main** tab is selected.
4. In the **Member Persons** zone, click the **Edit** (✎) icon in the **Edit** column corresponding to the member *p*erson whom you want to inactivate.
   The **Add/Edit Member Person** screen appears.
5. Select the **Inactive** option from the **Membership Person Status** list.
   The status of the member person is changed to **Inactive**.

Related Topics

For more information on...	See...
How to search for a membership	Searching for a Membership on page 293
Membership screen	Membership (Used for Viewing) on page 298
Member Persons zone	Member Persons on page 303

Editing the Membership Details of a Person

Prerequisites

To edit the membership details of a person, you should have:

- Contract relationship types defined in the application
- Required persons defined in the application

Procedure

To edit the membership details of a person:

1. Search for the membership in the **Membership** screen.
2. In the **Search Results** section, click the link in the **Membership Information** column corresponding to the *m*embership whose details you want to edit.
   The **Membership** screen appears.
3. Ensure that the **Main** tab is selected.
4. In the **Member Persons** zone, click the **Edit** (✎) icon in the **Edit** column corresponding to the member person *w*hose details you want to edit.

   The **Member Person** screen appears. It contains the following sections:

   - **Main** - Used to specify the basic membership details of a person.
   - **Characteristics** - Used to define the characteristics for a member person.

   The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Membership Information	Indicates the membership to which the person is added.	Not applicable
Person ID	Indicates the person who is added to the membership.	Not applicable

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The **Search** (🔍) icon appears corresponding to the Person ID field. On clicking the Search icon, the **Person Search** window appears.	
Relationship Type	Used to indicate how the person is related to the main subscriber. **Note:** The list includes only those contract relationship types which are already defined in the system.	Yes
Financially Responsible	Used to indicate whether the person is financially responsible for the membership.	No
Main Subscriber	Used to indicate whether the person is the main subscriber of the membership.	No
Member	Used to indicate whether the person is a member or a non-member in the membership.	No
Start Date	Used to specify the date from when you want to add the person to the membership. **Note:** The member person start date cannot be later than the member person end date. The member person start date cannot be earlier than the membership start date or later than the membership end date.	Yes
End Date	Used to specify the date till when you want to add the person to the membership. **Note:** The member person end date cannot be earlier than the member person start date. The member person end date cannot be earlier than the membership start date or later than the membership end date.	No
External Medicare Beneficiary ID	Used to specify the Medicare beneficiary identifier of the person who has availed the Medicare benefit.	No
Member Person Status	Used to indicate the status of the person in the membership. The valid values are: • Active • Canceled • Inactive • Pending Effectuation	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	Note: If you inactivate a member person who is the main subscriber, the system automatically inactivates the membership and all other member persons which are included in the membership. You cannot change the status of the member person to **Active** when the membership is in the **Inactive** status.	

5. Modify the required details in the **Main** section.
6. Define, edit, or remove the characteristics from the member person, if required.
7. Click **Save**.
   The changes made to the membership details of the person are saved.

Related Topics

For more information on...	See...
How to search for a membership	Searching for a Membership on page 293
Membership screen	Membership (Used for Viewing) on page 298
Member Persons zone	Member Persons on page 303
How to define a characteristic for a member person	Defining a Characteristic for a Member Person on page 320
How to inactivate a member person of a membership	Inactivating a Member Person on page 321

Removing a Person from a Membership

Procedure

To remove a person from a membership:

1. Search for the membership in the **Membership** screen.
2. In the **Search Results** section, click the link in the **Membership Information** column corresponding to the membership from which you want to remove a person.
   The **Membership** screen appears.
3. Ensure that the **Main** tab is selected.
4. In the **Member Persons** zone, click the **Delete** ( ) icon in the **Delete** column corresponding to the person that you want to remove from the membership.
   A message appears confirming whether you want to remove the person from the membership.

   Note: You cannot remove the member person who is the main subscriber of the membership.

5. Click **OK**.
   The person is removed from the membership.

Related Topics

For more information on...	See...
How to search for a membership	Searching for a Membership on page 293

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For more information on...	See...
Membership screen	Membership (Used for Viewing) on page 298
Member Persons zone	Member Persons on page 303

Associating a Contract with a Membership

Prerequisites

To associate a contract with a membership, you should have:

- Contracts defined in the application
- Values defined for the **BILL_TO_TYPE_FLG** lookup field

Procedure

To associate a contract with a membership:

1. Search for the membership in the **Membership** screen.
2. In the **Search Results** section, click the link in the **Membership Information** column corresponding to the *m*embership to which you want to associate a contract.
   The **Membership** screen appears.
3. Click the **Contracts and Charges** tab.
   The **Contracts and Charges** tab appears.
4. Click the **Add Contract** link in the upper right corner of the **Membership Contracts** zone.

   The **Associate Contract with Membership** screen appears. It contains the following section:

   - **Main** - Used to associate a contract with the membership. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Membership Information	Indicates the membership to which you want to associate a contract.	Not applicable
Contract ID	Used to indicate the contract that you want to associate with the membership. **Note:** The **Search** (🔍) icon appears corresponding to the **Contract ID** field. On clicking the **Search** icon, the **Contract Search** window appears.	Yes
Bill To	Used to indicate the entity against whom the corresponding charges should be billed. The valid values are: • Federal • State • Group • Individual **Note:** You cannot associate multiple contracts with the membership using the same bill to option. For example, you cannot associate C1 and C2 with M1 by selecting the **Group** option from the **Bill To** field.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
Start Date	Used to specify the date from when you want to associate the contract with the membership. **Note:** The start date cannot be later than end date. The start date cannot be earlier than the membership start date or later than the membership end date.	Yes
End Date	Used to specify the date till when you want to associate the contract with the membership. **Note:** The end date cannot be earlier than the start date. The end date cannot be earlier than the membership start date or later than the membership end date.	No

5. Enter the required details in the **Main** section.
6. Click **Save**.
   The contract is associated with the membership.

Related Topics

For more information on...	See...
How to search for a membership	Searching for a Membership on page 293
Membership screen	Membership (Used for Viewing) on page 298
Membership Contracts zone	Membership Contracts on page 306

Disassociating a Contract from a Membership

Procedure

To disassociate a contract from a membership:

1. Search for the membership in the **Membership** screen.
2. In the **Search Results** section, click the link in the **Membership Information** column corresponding to the *m*embership from which you want to disassociate the contract.
   The **Membership** screen appears.
3. Click the **Contract & Charges** tab.
   The **Contract & Charges** tab appears.
4. In the **Membership Contracts** zone, click the **Delete** ( ) icon in the **Delete** column corresponding to the *c*ontract that you want to disassociate from the membership.
   A message appears confirming whether you want to disaasociate the contract from the membership.
5. Click **OK**.
   The contract is disassociated from the membership.

Related Topics

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For more information on...	See...
How to search for a membership	Searching for a Membership on page 293
Membership screen	Membership (Used for Viewing) on page 298
Membership Contracts zone	Membership Contracts on page 306

Editing the Contract Association Details of a Membership

Prerequisites

To edit the contract association details of a membership, you should have:

- Contracts defined in the application
- Values defined for the **BILL_TO_TYPE_FLG** lookup field

Procedure

To edit the contract association details of a membership:

1. Search for the membership in the **Membership** screen.
2. In the **Search Results** section, click the link in the **Membership Information** column corresponding to the membership *w*hose contract details you want to edit.
   The **Membership** screen appears.
3. Click **Contracts and Charges** tab.
   The **Contracts and Charges** tab appears.
4. In the **Membership Contracts** zone, click the **Edit** (✎) icon in the **Edit** column corresponding to the *c*ontract whose association details you want to edit.

   The **Associate Contract with Membership** screen appears. It contains the following section:

   - **Main** - Used to associate a contract with the membership. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Membership Information	Indicates the membership to which you want to associate a contract.	Not applicable
Contract ID	Used to indicate the contract that you want to associate with the membership. **Note:** The **Search** (🔍) icon appears corresponding to the **Contract ID** field. On clicking the **Search** icon, the **Contract Search** window appears.	Yes
Bill To	Used to indicate the entity against whom the corresponding charges should be billed. The valid values are: • Federal • State • Group • Individual	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	Note: You cannot associate multiple contracts with the membership using the same bill to option. For example, you cannot associate C1 and C2 with M1 by selecting the **Group** option from the **Bill To** field.	
Start Date	Used to specify the date from when you want to associate the contract with the membership. **Note:** The start date cannot be later than end date. The start date cannot be earlier than the membership start date or later than the membership end date.	Yes
End Date	Used to specify the date till when you want to associate the contract with the membership. **Note:** The end date cannot be earlier than the start date. The end date cannot be earlier than the membership start date or later than the membership end date.	No

5. Modify the required details in the **Main** section.
6. Click **Save**.
   The changes made to the membership are saved.

Related Topics

For more information on...	See...
How to search for a membership	Searching for a Membership on page 293
Membership screen	Membership (Used for Viewing) on page 298
Membership Contracts zone	Membership Contracts on page 306

Viewing the Characteristics of a Member Person

Procedure

To view the characteristics of a member person in a membership:

1. Search for the membership in the **Membership** screen.
2. In the **Search Results** section, click the link in the **Membership Information** column corresponding to the membership *w*hose details you want to view.
   The **Membership** screen appears.
3. Ensure that the **Main** tab is selected.
4. In the **Member Persons** zone, click the **Broadcast** (📡) icon corresponding to the member person whose characteristics you want to view.
   The **Member Person Characteristics** zone appears.

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5. View the characteristics of the member person in the **Member Person Characteristics** zone.

Related Topics

For more information on...	See...
How to search for a membership	Searching for a Membership on page 293
Membership screen	Membership (Used for Viewing) on page 298
Member Persons zone	Member Persons on page 303
Member Person Characteristics zone	Member Person Characteristics on page 304

Viewing the Billable Charges Created for a Membership

Procedure

To view the billable charges created for a membership:

1. Search for the membership in the **Membership** screen.
2. In the **Search Results** section, click the link in the **Membership Information** column corresponding to the membership whose details you want to view.
   The **Membership** screen appears.
3. Click the **Charges** tab.
   The **Charges** tab appears.
4. View the billable charges created for the membership in the **Billable Charges** zone.

Related Topics

For more information on...	
How to search for a membership	Searching for a Membership on page 293
Membership screen	Membership (Used for Viewing) on page 298
Billable Charges zone	Billable Charges on page 307

Viewing the Bill Segments Generated for a Membership Billable Charge

Procedure

To view the bill segments generated for a membership billable charge:

1. Search for the membership in the **Membership** screen.
2. In the **Search Results** section, click the link in the **Membership Information** column corresponding to the membership whose details you want to view.
   The **Membership** screen appears.
3. Click the **Charges** tab.
   The **Charges** tab appears.
4. In the **Billable Charges** zone, click the **Broadcast** (📡) icon corresponding to the billable charge whose bill segments you want to view.
   The **Bill Segment Details** and **Billable Charge Timeline Details** zones appear.
5. View the bill segments generated for the billable charge in the **Bill Segment Details** zone.

Related Topics

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For more information on...	
How to search for a membership	Searching for a Membership on page 293
Membership screen	Membership (Used for Viewing) on page 298
Billable Charges zone	Billable Charges on page 307
Bill Segment Details zone	Bill Segment Details on page 308
Billable Charge Timeline Details zone	Billable Charge Timeline Details on page 309

Viewing the Timeline Details of a Membership Billable Charge

Procedure

To view the timeline details of a membership billable charge:

1. Search for the membership in the **Membership** screen.
2. In the **Search Results** section, click the link in the **Membership Information** column corresponding to the *m*embership whose details you want to view.
   The **Membership** screen appears.
3. Click the **Contract and Charges** tab.
   The **Contract and Charges** tab appears.
4. In the **Billable Charges** zone, click the **Broadcast** () icon corresponding to the billable charge whose *t*imeline details you want to view.
   The **Bill Segment Details** and **Billable Charge Timeline Details** zones appear.
5. View the timeline details of the billable charge in the **Billable Charge Timeline Details** zone.

Related Topics

For more information on...	
How to search for a membership	Searching for a Membership on page 293
Membership screen	Membership (Used for Viewing) on page 298
Billable Charges zone	Billable Charges on page 307
Bill Segment Details zone	Bill Segment Details on page 308
Billable Charge Timeline Details zone	Billable Charge Timeline Details on page 309

Viewing the Membership Pricing Calculation Details of a Timeline

Procedure

To view the pricing calculation details of a timeline:

1. Search for the membership in the **Membership** screen.
2. In the **Search Results** section, click the link in the **Membership Information** column corresponding to the *m*embership whose details you want to view.
   The **Membership** screen appears.
3. Click the **Contracts and Charges** tab.
   The **Contracts and Charges** tab appears.

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4. In the **Billable Charges** zone, click the **Broadcast** (📡) icon corresponding to the billable charge whose *t*imeline details you want to view.
   The **Bill Segment Details** and **Billable Charge Timeline Details** zones appear.
5. In the **Billable Charge Timeline Details** zone, click the **Broadcast** (📡) icon corresponding to the timeline *w*hose membership pricing calculation details you want to view.
6. View the base fee and modifier fee (if any) applicable for each eligible member or membership in the **Pricing Calculation Details** zone.

Related Topics

For more information on...	
How to search for a membership	Searching for a Membership on page 293
Membership screen	Membership (Used for Viewing) on page 298
Billable Charges zone	Billable Charges on page 307
Bill Segment Details zone	Bill Segment Details on page 308
Billable Charge Timeline Details zone	Billable Charge Timeline Details on page 309
Pricing Calculation Details zone	Pricing Calculation Details on page 310

Viewing the Billable Charges Created for a Membership Benefit Sponsor

Procedure

To view the billable charges created for a membership benefit sponsor :

1. Search for the membership in the **Membership** screen.
2. In the **Search Results** section, click the link in the **Membership Information** column corresponding to the *m*embership whose details you want to view.
   The **Membership** screen appears.
3. Click the **Charges** tab.
   The **Charges** tab appears.
4. View the sponsor billable charges created for the membership in the **Sponsor Billable Charges** zone.

Related Topics

For more information on...	
How to search for a membership	Searching for a Membership on page 293
Membership screen	Membership (Used for Viewing) on page 298
Sponsor Billable Charges zone	Sponsor Billable Charges on page 311

Viewing the Bill Segments Generated for a Membership Benefit Sponsor

Procedure

To view the bill segments generated for a membership benefit sponsor:

1. Search for the membership in the **Membership** screen.
2. In the **Search Results** section, click the link in the **Membership Information** column corresponding to the *m*embership whose details you want to view.

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The **Membership** screen appears.

3. Click the **Charges** tab.
   The **Charges** tab appears.
4. In the **Sponsor Billable Charges** zone, click the **Broadcast** (📡) icon corresponding to the billable charge whose bill *s*egments you want to view.
   The **Sponsor Bill Segment Details** and **Sponsor Billable Charge Timeline Details** zones appear.
5. View the sponsor bill segments generated for the sponsor billable charge in the **Sponsor Bill Segment Details** zone.

Related Topics

For more information on...	
How to search for a membership	Searching for a Membership on page 293
Membership screen	Membership (Used for Viewing) on page 298
Sponsor Billable Charges zone	Sponsor Billable Charges on page 311
Sponsor Bill Segment Details zone	Sponsor Bill Segment Details on page 313
Sponsor Billable Charge Timeline Details zone	Sponsor Billable Charge Timeline Details on page 314

Viewing the Timeline Details of a Sponsor Billable Charge

Procedure

To view the timeline details of a sponsor billable charge:

1. Search for the membership in the **Membership** screen.
2. In the **Search Results** section, click the link in the **Membership Information** column corresponding to the *m*embership whose details you want to view.
   The **Membership** screen appears.
3. Click the **Charges** tab.
   The **Charges** tab appears.
4. In the **Sponsor Billable Charges** zone, click the **Broadcast** (📡) icon corresponding to the sponsor billable charge whose *t*imeline details you want to view.
   The **Sponsor Bill Segment Details** and **Sponsor Billable Charge Timeline Details** zones appear.
5. View the timeline details of the billable charge in the **Sponsor Billable Charge Timeline Details** zone.

Related Topics

For more information on...	
How to search for a membership	Searching for a Membership on page 293
Membership screen	Membership (Used for Viewing) on page 298
Sponsor Billable Charges zone	Sponsor Billable Charges on page 311
Sponsor Bill Segment Details zone	Sponsor Bill Segment Details on page 313
Sponsor Billable Charge Timeline Details zone	Sponsor Billable Charge Timeline Details on page 314

Viewing the Sponsor Pricing Calculation Details of a Timeline

Procedure

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To view the sponsor pricing calculation details of a timeline:

1. Search for the membership in the **Membership** screen.
2. In the **Search Results** section, click the link in the **Membership Information** column corresponding to the *m*embership whose details you want to view.
   The **Membership** screen appears.
3. Click the **Charges** tab.
   The **Charges** tab appears.
4. In the **Sponsor Billable Charges** zone, click the **Broadcast** (📡) icon corresponding to the billable charge whose *t*imeline details you want to view.
   The **Sponsor Bill Segment Details** and **Sponsor Billable Charge Timeline Details** zones appear.
5. In the **Sponsor Billable Charge Timeline Details** zone, click the **Broadcast** (📡) icon corresponding to the timeline *w*hose pricing calculation details you want to view.
6. View the base fee and modifier fee (if any) applicable for each eligible member or membership in the **Sponsor Pricing Calculation Details** zone.

Related Topics

For more information on...	
How to search for a membership	Searching for a Membership on page 293
Membership screen	Membership (Used for Viewing) on page 298
Sponsor Billable Charges zone	Sponsor Billable Charges on page 311
Sponsor Bill Segment Details zone	Sponsor Bill Segment Details on page 313
Sponsor Billable Charge Timeline Details zone	Sponsor Billable Charge Timeline Details on page 314
Sponsor Pricing Calculation Details zone	Sponsor Pricing Calculation Details on page 315

Viewing the Log of a Membership

Procedure

To view the log of a membership:

1. Search for the membership in the **Membership** screen.
2. In the **Search Results** section, click the link in the **Membership Information** column corresponding to the *m*embership whose details you want to view.
   The **Membership** screen appears.
3. Click the **Log** tab.
   The **Log** tab appears.
4. View the complete trail of actions performed on the membership in the **Membership Log** zone.

Related Topics

For more information on...	**See...**
How to search for a membership	Searching for a Membership on page 293
Membership screen	Membership (Used for Viewing) on page 298
Membership Log zone	Membership Log on page 316
How to add a log entry for a membership	Adding a Log Entry for a Membership on page 334

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Adding a Log Entry for a Membership

Procedure

To add a log entry for a membership:

1. Search for the membership in the **Membership** screen.
2. In the **Search Results** section, click the link in the **Membership Information** column corresponding to the *m*embership for which you want to add a log entry.
   The **Membership** screen appears.
3. Click the **Log** tab.
   The **Log** tab appears.
4. Click the **Add Log Entry** link in the upper right corner of the **Membership Log** zone.

   The **Add Membership Log** window appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Membership Information	Displays information about the membership.	Not applicable
Log Details	Used to specify additional comments for the membership.	Yes

5. Enter the comments in the **Log Details** field.
6. Click **Save**.
   The log entry is added in the **Membership Log** zone.

Related Topics

For more information on...	See...
How to search for a membership	Searching for a Membership on page 293
Membership screen	Membership (Used for Viewing) on page 298
Membership Log zone	Membership Log on page 316

Chapter 6

Self-Funded Group Policy

Topics:

- Pre-requisites
- Self-Funded Policy Creation
- Self-Funded Policy Status Transition
- Algorithms Used in C1-ASOPolicy
- Policy (Used for Searching)
- Policy (Used for Viewing)

Self-funded group health insurance, also known as Administrative Services Only (ASO), is a self insurance arrangement whereby an employer provides health or disability benefits to employees using the company's own funds. A self-insured employer will set up a special trust fund to earmark money (corporate and employee contributions) to pay incurred claims. It is also commonly known as self-funded employee health insurance.

In the self-funded group health plan, employers operate their own health plan. However, in the fully-insured group health plan, the employer contracts an insurance company to cover the employees and dependents. Employers choose to self-insure because it allows them to save the profit margin that an insurance company adds to its premium for a fully-insured group health plan. However, self-insuring exposes the company to much larger risk when more claims than expected must be paid.

Oracle Revenue Management and Billing (ORMB) supports the following types of self-funding approach:

- **Fully Self-Funded** - In the fully self-funded approach, the employer retains all the risk and bears the claim costs irrespective of any limit.
- **Partially Self-Funded** - In the partially self-funded approach, the employer purchases reinsurance or stop loss coverage to pass the risk to insurance company.

Oracle Revenue Management and Billing (ORMB) provides specialized methodologies for calculating claim amount with or without markups, enrollment fees, claim fees, specific stop-loss credits, aggregate stop-loss credits, non-recurring or recurring flat fees for covered services, network discounts, and fixed or enrollment based premium funds. Once the charges are calculated, the system bills the amount to the employer (known as the parent customer in ORMB) or to its logical designed billing entities (known as the bill groups in ORMB).

Oracle Revenue Management and Billing (ORMB) enables you to use the pricing methodologies and the billing engine for the self-funded group health insurance business. To design the pricing and billing models for the self-funded group health insurance business, you need to create the following entities in ORMB:

- Parent Customer
- Bill Groups
- Bill Group's Account
- Self-Funded Policy
- Price Items (for each covered service in the policy)
- Pricing Rule Types
- Pricing Rules

Pre-requisites

To set the billing system for a self-funded group customer, you need to do the following:

- Define the required policy types in the system.
- Define the required policy person roles in the system.
- Define the values for the **RUNOUT_ADM_OPT_FLG** lookup field.
- Define the required characteristic types where the characteristic entity is set to **Policy Type**.
- Define the required characteristic types where the characteristic entity is set to **Policy**.
- Define the required parameter values in the following algorithm which is attached to the **C1-ASOPolicy** business object:
  - C1-ASOBOPOSP
- Define the required parameter values in the following algorithm which is used in the lifecycle of the **C1-ASOPolicy** business object:
  - C1-ASOPOLMOA
- Set the values for the following option types in the **C1-ASOBLLNG** feature configuration:
  - Parent Customer Policy Person Role
  - Bill Group Policy Person Role
- Set the values for the following option types in the **C1-PERSTYPE** feature configuration:
  - Bill Group Person Type
  - Parent Person Type
- Set the batch control type of the **Policy Periodic Monitor (C1-POLPR)** batch to **Timed** and define the following attributes:
  - Time Interval
  - Timer Active
  - User ID
  - Batch Language
  - Email Address

Related Topics

For more information on...	See...
How to setup the **C1-ASOBLLNG** feature configuration	Setting the C1-ASOBLLNG Feature Configuration on page 4417

Self-Funded Policy Creation

You can create a self-funded policy using a policy type where the policy category is set to **Self-Funded**. The policy type indicates the business object using which the self-funded policy should be created in the system.

As per the self-funded health insurance business, the system enables you to create a self-funded policy for a bill group where the parent customer is the policy holder. You can create or edit a self-funded policy from the **Policy** screen. In addition, you can create or edit a self-funded policy through a customer registration object or a health care inbound message. If the self-funded policy information is given for a bill group in a health care inbound message, the system does the following:

- Associates the bill group with the policy using the policy person role which is specified in the **Bill Group Policy Person Role** option type of the **C1-ASOBLLNG** feature configuration

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- Associates the parent customer with the policy using the policy person role which is specified in the **Parent Customer Policy Person Role** option type of the **C1-ASOBLLNG** feature configuration

A self-funded policy encapsulates the following information:

- **Policy Persons** - While creating a self-funded policy, you need to associate the person who is the main customer of the policy. While associating a person with a self-funded policy, you need to specify the policy person role which indicates the role of the person in the policy. For example, whether the person associated with the policy is the policy holder, broker, or underwriter. You can associate multiple persons with a self-funded policy using the same or different policy person role. However, at a time, only one person can be the main customer of the policy.
- **Policy Contracts** - The system creates a contract for a self-funded policy when the policy is created either from the user interface or through an inbound message. For more information, refer to Self-Funded Policy Contract Creation on page 340.

On defining a self-funded policy, the status of the policy is set to **Pending**. You can then edit, delete or activate a policy. Once a self-funded policy is activated, you can renew the policy whenever required.

Note: If a self-funded policy is created through a customer registration object or a health care inbound message, the status of the policy is set to **Pending**.

In a self-funded policy, you can specify the policy period as well as the runout period. Here, the policy period means the period between the policy start and end dates when the policy is active. And, the runout period means the period between the runout start and end dates when the policy is no more active. Note that the system sets the runout start date to the policy end date + 1 Day when you specify the runout end date.

The system enables you to create a self-funded policy for the following contract types which are used in the self-funded health insurance business:

Contract Type	**Policy (Example)**	**Policy Period (i.e. Period when Policy will be in the Active Status)**	**Runout Period (i.e. Period when Policy will be in the Runout Status)**	**Comments**
12/12 (Claims Incurred and Paid During the Policy Period)	P1	01-01-2019 to 12-31-2019	-	Here, you will not specify the runout end date for the self-funded policy (i.e. P1).
12/15 (Claims Incurred During the Policy Period and Paid During the Policy and Runout Periods)	P2	01-01-2019 to 12-31-2019	01-01-2020 to 03-31-2020	Here, the runout period is derived when you set the runout end date of the self-funded policy (i.e. P2) to 03-31-2020.
12/18 (Claims Incurred During the Policy Period and Paid During the Policy and Runout Periods)	P3	01-01-2019 to 12-31-2019	01-01-2020 to 06-30-2020	Here, the runout period is derived when you set the runout end date of the self-funded policy (i.e. P3) to 06-30-2020.
15/12 (Claims Incurred Three Months Prior to the Policy Start Date and During	P4	01-01-2019 to 12-31-2019	-	Here, you will not specify the runout end date for the self-

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Contract Type	Policy (Example)	Policy Period (i.e. Period when Policy will be in the Active Status)	Runout Period (i.e. Period when Policy will be in the Runout Status)	Comments
the Policy Period and Paid During the Policy Period)				funded policy (i.e. P4).

The system enables you to offer different pricing for different policy periods, such as active, runout, and post runout.

Self-Funded Policy Activation

A self-funded policy can be activated manually from the user interface or through the **Policy Periodic Monitor (C1-POLPR)** batch. You can activate a self-funded policy by clicking the **Activate** button in the **Policy** screen. On clicking the **Activate** button, the system checks whether the To Do created for the **Pending** status is completed. If the To Do created for the **Pending** status is not completed, it completes the To Do and then changes the status of the self-funded policy from **Pending** to **In Force/Active**.

Note: The status of the policy is not changed from **Pending** to **In Force/Active** until the system date is later than or equal to the policy start date.

On executing the **Policy Periodic Monitor (C1-POLPR)** batch, the system does the following:

- If the self-funded policy is in the **Pending** status and the policy start date - X days is earlier than or equal to the system date, it creates a To Do using the To Do type which is specified in the **To Do Type for Pending Status** parameter (of an algorithm created using the **C1-ASOPOLMOA** algorithm type).
- If the start date of the self-funded policy is earlier than or equal to the system date and the To Do created using the To Do type specified in the **To Do Type for Pending Status** parameter is completed, it changes the status of the self-funded policy from **Pending** to **In Force/Active**.

You can define pricing rules using the pricing rule types of the following categories for a self-funded policy of a bill group which is in the **Active** status:

- Claim
- Specific Stop-Loss
- Aggregate Stop-Loss
- Retention Type Claim Based
- Retention Type Enrollment Based
- Ancillary
- Flat Fees
- Level Funded

Transition of Self-Funded Policy to Runout Status

A self-funded policy can be transitioned to the **Runout** status from the user interface or through the **Policy Periodic Monitor (C1-POLPR)** batch. You can transition a self-funded policy to the **Runout** status by clicking the **Runout** button in the **Policy** screen. On clicking the **Runout** button, the system checks whether the To Do created for the **In Force/Active** status is completed. If the To Do created for the **In Force/Active** status is not completed, it completes the To Do and then changes the status of the self-funded policy from **In Force/Active** to **Runout**.

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Note: The status of the policy is not changed from **In Force/Active** to **Runout** when either of the following condition is met:

- The runout end date is not specified.
- The system date is earlier than or equal to the policy end date.
- The policy is renewed.

On executing the **Policy Periodic Monitor (C1-POLPR)** batch, the system does the following:

- If the self-funded policy is in the **In Force/Active** status and the policy end date - X days is earlier than or equal to the system date, it creates a To Do using the To Do type which is specified in the **To Do Type for Active Status** parameter (of an algorithm created using the **C1-ASOPOLMOA** algorithm type).
- If the end date of the self-funded policy is earlier than or equal to the system date and the To Do created using the To Do type specified in the **To Do Type for Active Status** parameter is completed, it changes the status of the self-funded policy from **In Force/Active** to **Runout**.

You can define pricing rules using the pricing rule types of the following categories for a self-funded policy of a bill group which is in the **Runout** status:

- Claim
- Specific Stop-Loss
- Aggregate Stop-Loss
- Retention Type Claim Based
- Ancillary
- Flat Fees
- Level Funded

Transition of Self-Funded Policy to Post Runout Status

A self-funded policy can be transitioned to the **Post Runout** status only through the **Policy Periodic Monitor (C1-POLPR)** batch. On executing the **Policy Periodic Monitor (C1-POLPR)** batch, the system does the following:

- If the self-funded policy is in the **Runout** status and the runout end date - X days is earlier than or equal to the system date, it creates a To Do using the To Do type which is specified in the **To Do Type for Runout Status** parameter (of an algorithm created using the **C1-ASOPOLMOA** algorithm type).
- If the runout end date of the self-funded policy is earlier than or equal to the system date and the To Do created using the To Do type specified in the **To Do Type for Runout Status** parameter is completed, it changes the status of the self-funded policy from **Runout** to **Post Runout**.

You can define pricing rules using the pricing rule types of the following categories for a self-funded policy of a bill group which is in the **Post Runout** status:

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

Self-Funded Policy Renewal

You can renew a self-funded policy which is associated with a bill group. However, note that you can renew a self-funded policy only when it is in the **In Force/Active** status and which is not yet renewed. You can renew a self-funded policy only from the user interface and not through a health care inbound message.

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On renewing a self-funded policy, a new policy is created in the **Pending** status. The renewal date is stamped in the base policy. The information from the base policy is copied to the renewed policy. The start date of the renewed policy is set to the base policy's end date plus one day. For example, if the base policy's end date is 12-31-2018, then by default, the renewed policy's start date is set to 01-01-2019.

While renewing a self-funded policy, you cannot disassociate persons (from the renewed policy) who are associated with the base policy using a policy person role which is specified in the **Bill Group Policy Person Role** or **Parent Customer Policy Person Role** option type of the **C1-ASOBLLNG** feature configuration.

While renewing a self-funded policy, the system enables you to copy the following pricing rules of the base policy and thereby create new pricing rules for the renewed policy:

- Claim
- Retention Type Claim Based
- Retention Type Enrollment Based
- Recurring Flat Fees
- Ancillary

While copying a pricing rule, the start and end dates of the new pricing rule are set to the renewed policy's start and end dates, respectively. If there are multiple pricing rules which are created using the same pricing rule type and are effective for the different date range, the system copies only one pricing rule from the base policy with the latest date range.

Once a policy is renewed, you cannot edit the base policy's end date or manually change the status of the base policy to **Runout**. The system automatically changes the status of the base policy to **Runout** when the status of the latest renewed policy is changed to **Runout**.

Self-Funded Policy Contract Creation

The system automatically creates contracts when a self-funded policy is created either from the user interface or through a health care inbound message. It creates a contract for a self-funded policy on each account of the bill group. It creates a contract using the contract type which is specified in the **Contract Type** parameter of an algorithm which is created using the **C1-ASOBOPOSP** algorithm type. Let us assume that the **Contract Type** parameter in the **C1-ASOBOPOSP** algorithm is set to `CT1`. Now, when you create the self-funded policies named P1 and P2 for BG1 and P11, P12, and P13 for BG2 through a health care inbound message, the system will create a set of contracts on the respective accounts as mentioned below.

The following table indicates the number of contracts that are created for a self-funded policy on each account of a bill group:

Bill Group	**Account**	**Contract**
BG1	A1	C1 (for P1 using the CT1 contract type)
		C2 (for P2 using the CT1 contract type)
	A2	C3 (for P1 using the CT1 contract type)
		C4 (for P2 using the CT1 contract type)
BG2	A4	C11 (for P11 using the CT1 contract type)
		C12 (for P12 using the CT1 contract type)
		C13 (for P13 using the CT1 contract type)
	A5	C14 (for P11 using the CT1 contract type)
		C15 (for P12 using the CT1 contract type)
		C16 (for P13 using the CT1 contract type)
	A6	C17 (for P11 using the CT1 contract type)

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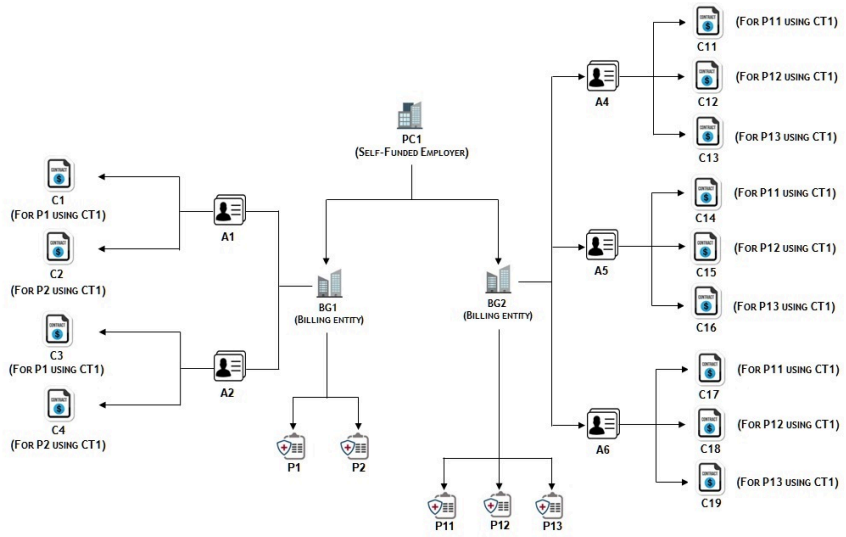
Bill Group	Account	Contract
		C18 (for P12 using the CT1 contract type)
		C19 (for P13 using the CT1 contract type)

The following figure graphically represents the above example:



You can also specify comma-separated values for the **Contract Type** parameter. The system will then create a contract using each contract type for each self-funded policy on each account of the bill group. Let us assume that the **Contract Type** parameter in the **C1-ASOBOPOSP** algorithm is set to `CT1, CT2`. Now, when you create the self-funded policies named P1 and P2 for BG1 and P11 and P12 for BG2 through a health care inbound message, the system will create a set of contracts on the respective accounts as mentioned below.

The following table indicates the number of contracts that are created for a self-funded policy on each account of a bill group:

Bill Group	Account	Contract
BG1	A1	C1 (for P1 using the CT1 contract type)
		C2 (for P1 using the CT2 contract type)
		C3 (for P2 using the CT1 contract type)
		C4 (for P2 using the CT2 contract type)
	A2	C5 (for P1 using the CT1 contract type)
		C6 (for P1 using the CT2 contract type)
		C7 (for P2 using the CT1 contract type)
		C8 (for P2 using the CT2 contract type)
BG2	A11	C11 (for P11 using the CT1 contract type)
		C12 (for P11 using the CT2 contract type)
		C13 (for P12 using the CT1 contract type)
		C14 (for P12 using the CT2 contract type)
	A12	C15 (for P11 using the CT1 contract type)

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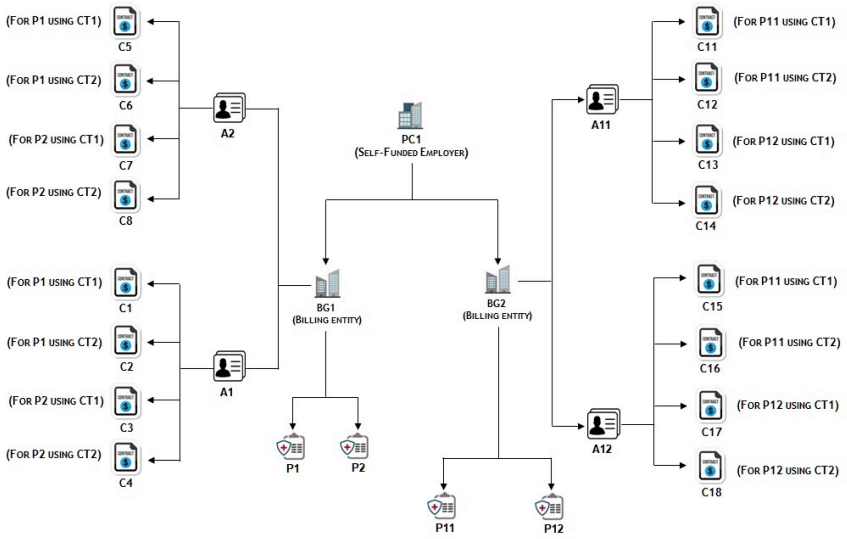
Bill Group	Account	Contract
		C16 (for P11 using the CT2 contract type)
		C18 (for P12 using the CT1 contract type)
		C19 (for P12 using the CT2 contract type)

The following figure graphically represents the above example:



Self-Funded Policy Status Transition

The following figure graphically indicates how a self-funded policy moves from one status to another in its lifecycle:

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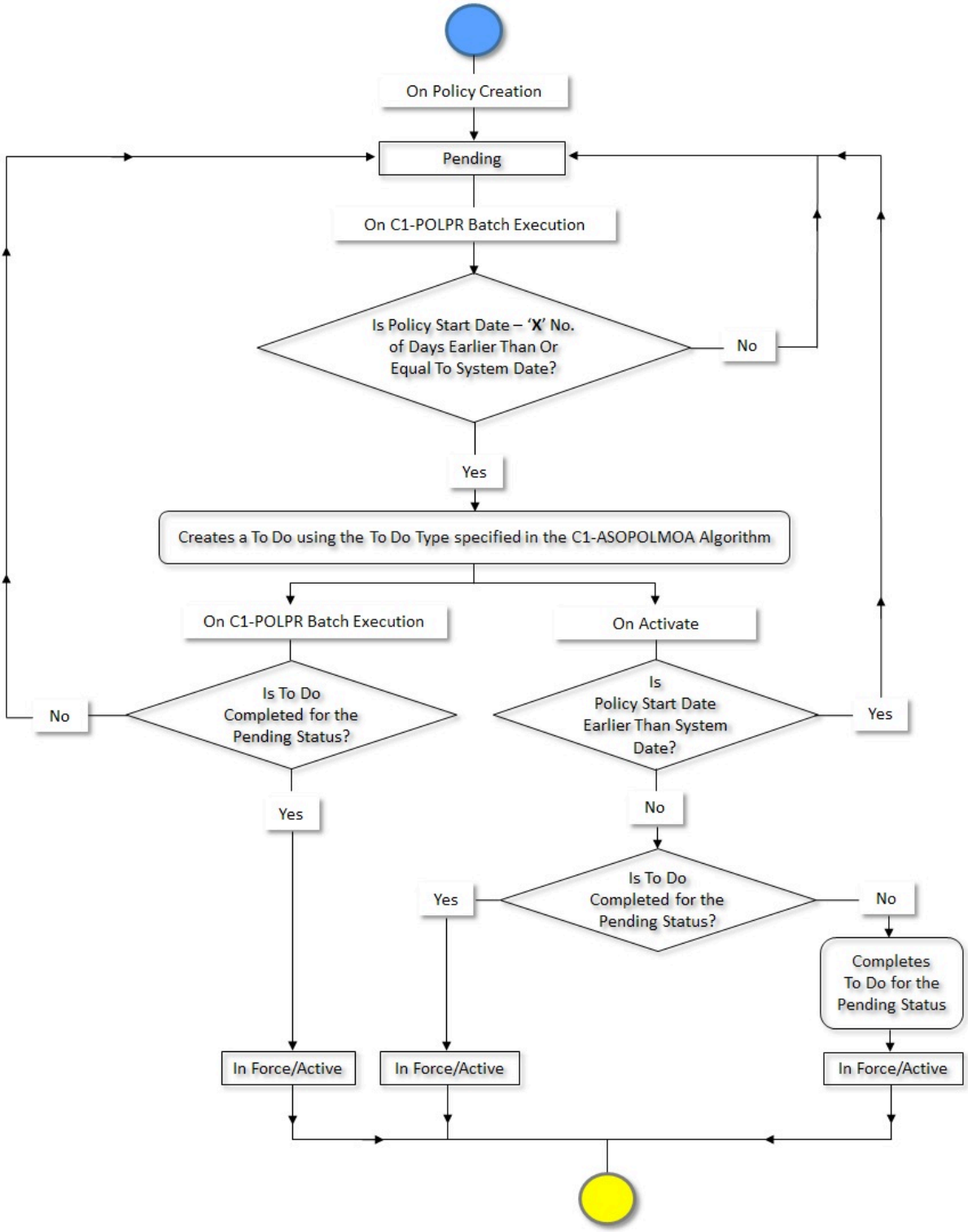

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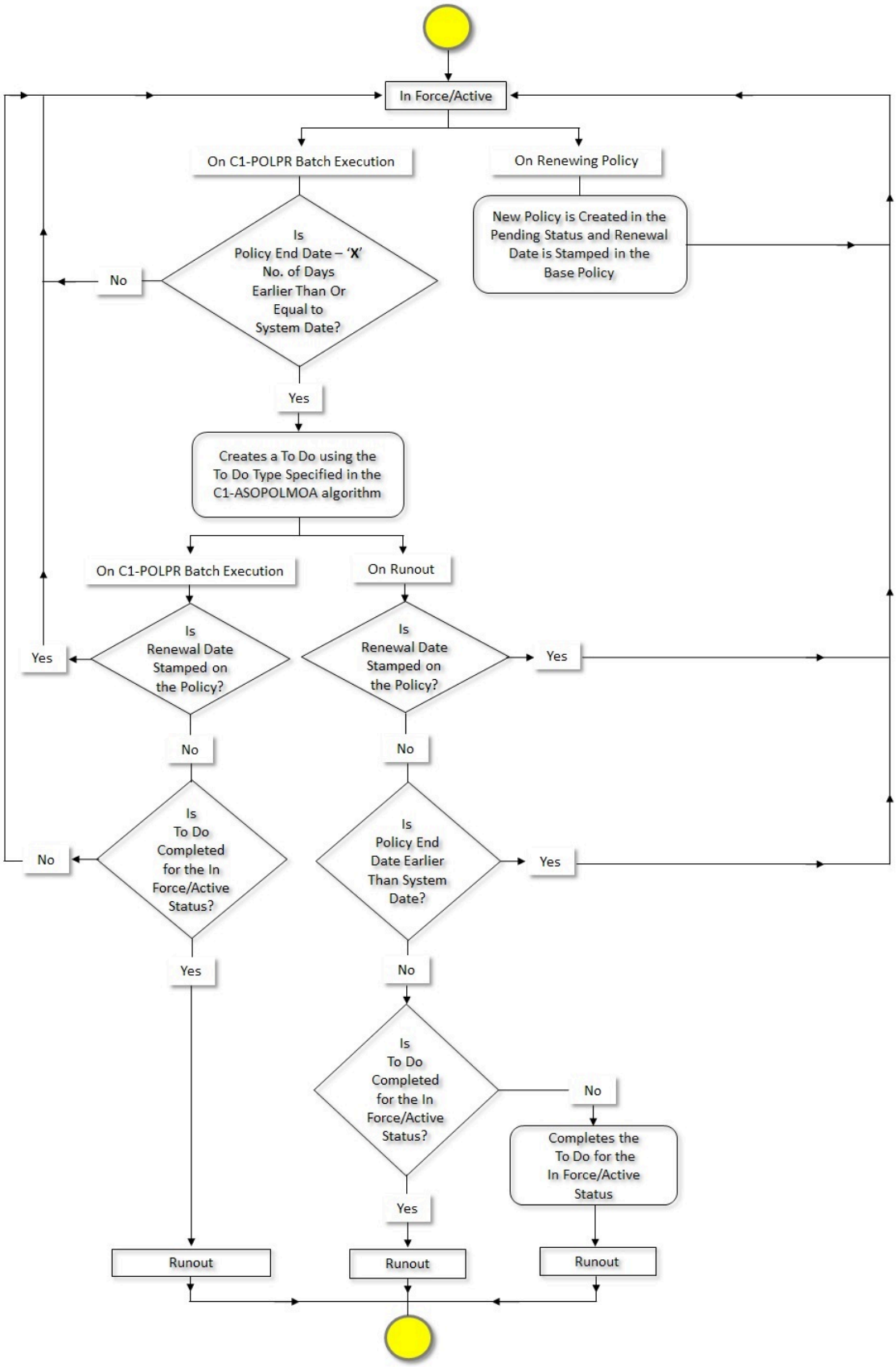

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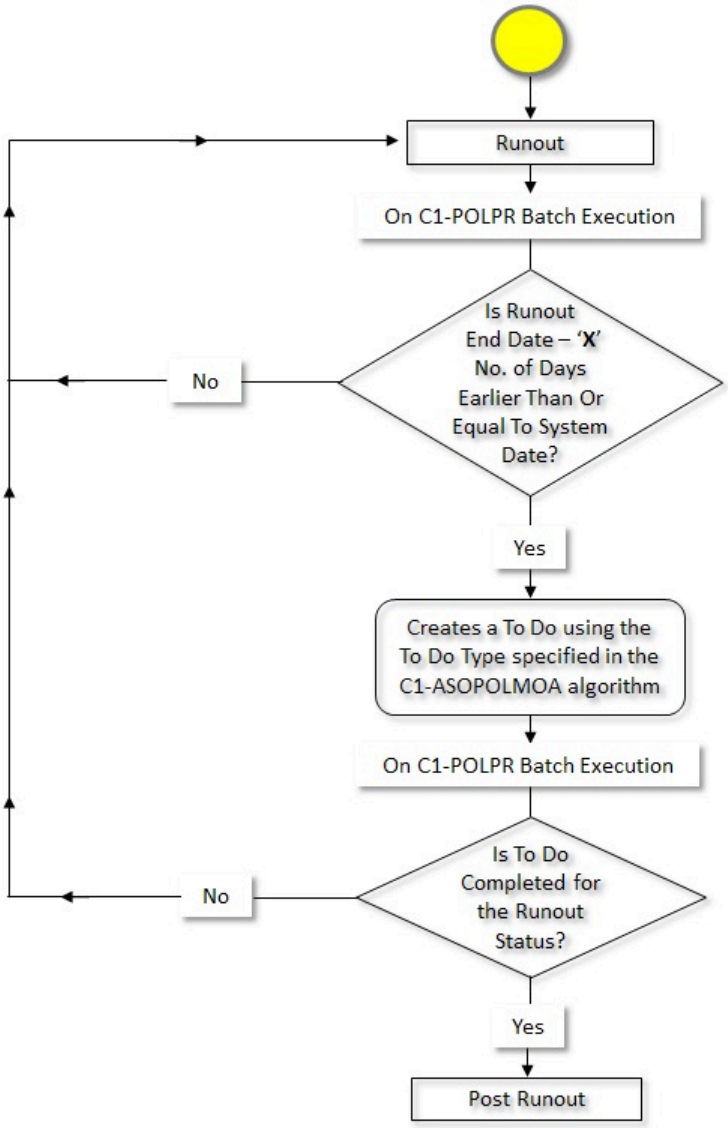

Algorithms Used in C1-ASOPolicy

The following table lists the algorithms which are attached to the **C1-ASOPolicy** business object:

System Event	Algorithm	Algorithm Type	Description
Validation	C1-ASOPOLVAL	C1-ASOPOLVAL	Refer to C1-ASOPOLVAL on page 346.
Post-Processing	C1-ASOBOPOSP	C1-ASOPOLPOS	Refer to C1-ASOBOPOSP on page 346.
	C1-ASOPRUCPY	C1-ASOPRUCPY	Refer to C1-ASOPRUCPY on page 347.

The following table lists the algorithms which are used in the lifecycle of the **C1-ASOPolicy** business object:

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Status	System Event	Algorithm	Algorithm Type	Description
Pending	Monitor	C1-ASOPOLMOA	C1-ASOPOLMOA	Refer to C1-ASOPOLMOA on page 347.
	Enter	C1-ASOPOLREN	C1-ASOPOLREN	Refer to C1-ASOPOLREN on page 348.
	Exit	C1-ASOPCKTD	C1-ASOPCKTD	Refer to C1-ASOPCKTD on page 348.
In Force/Active	Monitor	C1-ASOPOLMOA	C1-ASOPOLMOA	Refer to C1-ASOPOLMOA on page 347.
	Exit	C1-ASOPCKTD	C1-ASOPCKTD	Refer to C1-ASOPCKTD on page 348.
Runout	Monitor	C1-ASOPOLMOA	C1-ASOPOLMOA	Refer to C1-ASOPOLMOA on page 347.
	Exit	C1-ASOPCKTD	C1-ASOPCKTD	Refer to C1-ASOPCKTD on page 348.
Post Runout	-	-	-	-

C1-ASOPOLVAL

This algorithm validates a self-funded policy throughout its lifecycle. It checks the following:

- The policy end date is not earlier than the policy start date.
- The runout end date is later than the policy end date.
- The runout end date is later than the system date while editing the policy which is in the **Runout** status.
- The runout end date is not removed when the policy is in the **Runout** or **Post Runout** status.
- The policy end date is not modified when the policy is in the **Runout** status.
- The policy end date is not set to a date which is later than or equal to the start date of a pricing rule which is defined for the **Runout** status.
- The runout end date is not set to a date which is later than or equal to the start date of a pricing rule which is defined for the **Post Runout** status.
- The runout end date is not set to a date which is earlier than the end date of a pricing rule which is defined for the **Runout** status.
- The policy is not edited when it is in the **Post Runout** status.
- The policy start date is not modified when the policy is in the **In Force/Active**, **Runout**, or **Post Runout** status.
- The policy person end date is not earlier than the policy person start date.
- The policy person role is specified while associating a person with the policy.
- One of the policy persons is set as the main customer of the policy.
- The policy end date is not changed when the policy is renewed.

C1-ASOBOPOSP

This algorithm is invoked when you create a self-funded policy either from the user interface or through an inbound message. It creates a contract of the specified contract type for the self-funded policy on each account of the bill group. For example, if you create a self-funded policy named P1 for a bill group who has two accounts - A1 and A2, the system will create two contracts for P1 - one on the A1 account and another on the A2 account.

It contains the following parameter:

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- **Contract Type** - Used to indicate the contract type whose contract you want to create for the self-funded policy on each account of the bill group. You can also specify comma-separated values for this parameter. It will then create a contract of each contract type for the self-funded policy on each account of the bill group.

C1-ASOPRUCPY

This algorithm is invoked when the **Copy Pricing Rules** option is selected while renewing a self-funded policy. It copies the following pricing rules of the base policy and creates new pricing rules for the renewed policy:

- Claim
- Retention Type Claim Based
- Retention Type Enrollment Based
- Recurring Flat Fees
- Ancillary

While copying a pricing rule, the start and end dates of the new pricing rule are set to the renewed policy's start and end dates, respectively. If there are multiple pricing rules which are created using the same pricing rule type and are effective for the different date range, the system copies only one pricing rule from the base policy with the latest date range.

C1-ASOPOLMOA

This algorithm is invoked when the **Policy Periodic Monitor (C1-POLPR)** batch is executed. It does the following:

- If the self-funded policy is in the **Pending** status and the policy start date - X days is earlier than or equal to the system date, it creates a To Do using the To Do type which is specified in the **To Do Type for Pending Status** parameter.
- If the start date of the self-funded policy is earlier than or equal to the system date and the To Do created using the To Do type specified in the **To Do Type for Pending Status** parameter is completed, it changes the status of the self-funded policy from **Pending** to **In Force/Active**.
- If the self-funded policy is in the **In Force/Active** status and the policy end date - X days is earlier than or equal to the system date, it creates a To Do using the To Do type which is specified in the **To Do Type for Active Status** parameter.
- If the end date of the self-funded policy is earlier than or equal to the system date and the To Do created using the To Do type specified in the **To Do Type for Active Status** parameter is completed, it changes the status of the self-funded policy from **In Force/Active** to **Runout**.
- If the self-funded policy is in the **Runout** status and the runout end date - X days is earlier than or equal to the system date, it creates a To Do using the To Do type which is specified in the **To Do Type for Runout Status** parameter.
- If the runout end date of the self-funded policy is earlier than or equal to the system date and the To Do created using the To Do type specified in the **To Do Type for Runout Status** parameter is completed, it changes the status of the self-funded policy from **Runout** to **Post Runout**.

It contains the following parameters:

- **To Do Type for Pending Status** - Used to indicate the To Do type using which you want to create the To Do, X days prior to the policy start date.
- **To Do Type for Active Status** - Used to indicate the To Do type using which you want to create the To Do, X days prior to the policy end date.
- **To Do Type for Runout Status** - Used to indicate the To Do type using which you want to create the To Do, X days prior to the runout end date.
- **X Days** - Used to specify the number of days prior to which you want to create a To Do for the self-funded policy.

All these parameters are mandatory.

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C1-ASOPOLREN

This algorithm is invoked when you renew a self-funded policy. Once the new policy is created in the **Pending** status, it stamps the renewal date on the base policy.

C1-ASOPCKTD

This algorithm is invoked when you click the **Activate** and **Runout** buttons in the **Policy** screen. On clicking the **Activate** button, it checks whether the To Do created for the **Pending** status is completed. If the To Do created for the **Pending** status is not completed, it completes the To Do and then changes the status of the self-funded policy from **Pending** to **In Force/Active**.

Similarly, on clicking the **Runout** button, it checks whether the To Do created for the **In Force/Active** status is completed. If the To Do created for the **In Force/Active** status is not completed, it completes the To Do and then changes the status of the self-funded policy from **In Force/Active** to **Runout**.

It also validates the following:

- The status of the policy is not changed from **Pending** to **In Force/Active** until the system date is later than or equal to the policy start date.
- The status of the policy is not changed from **In Force/Active** to **Runout** when the runout end date is not specified.
- The status of the policy is not changed from **In Force/Active** to **Runout** until the system date is later than the policy end date.
- The status of the policy is not changed to **Runout** if it is renewed.

In addition, it also changes the status of the base policies to **Runout** when the status of the latest renewed policy is changed to **Runout**.

Policy (Used for Searching)

The **Policy** screen allows you to search for a policy using various search criteria. It also allows you to define a policy. It contains the following zone:

- Search Policy on page 235

Through this screen, you can navigate to the following screen:

- Policy (Used for Viewing) on page 247

Search Policy

The **Search Policy** zone allows you to search for a policy using various search criteria. It contains the following two sections:

- **Search Criteria** - The **Search Criteria** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Search By	Used to indicate whether you want to search for a policy using the policy or person details. The valid values are: • Policy Date/Policy Type/Status • Source System/Policy Number/Description • Person Name/Person Identifier	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	• Policy Characteristics **Note:** By default, the **Policy Date/Policy Type/Status** option is selected.	
Policy Type	Used to search policies which are created using a particular policy type. **Note:** This field appears when the **Policy Date/Policy Type/Status** option is selected from the **Search By** list.	No
Start Date	Used to search policies which are effective from a particular date. **Note:** This field appears when the **Policy Date/Policy Type/Status** option is selected from the **Search By** list.	No
Status	Used to search policies with a particular status. The valid values are: • In Force/Active • Canceled • Pending Cancellation • Pending • Pending Reinstatement • Pending Termination • Post Runout • Reinstated • Runout • Terminated **Note:** This field appears when the **Policy Date/Policy Type/Status** option is selected from the **Search By** list.	No
End Date	Used to search policies which are effective till a particular date. **Note:** This field appears when the **Policy Date/Policy Type/Status** option is selected from the **Search By** list.	No
Source System	Used to search policies which originated from a particular external system. **Note:** This field appears when the **Source System/Policy Number/ Description** option is selected from the **Search By** list.	No
Policy Number	Used to search a policy with a particular policy number. **Note:** This field appears when the **Source System/Policy Number/ Description** option is selected from the **Search By** list.	No
Description	Used to search policies with a particular description. **Note:** This field appears when the **Source System/Policy Number/ Description** option is selected from the **Search By** list.	No

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Field Name	Field Description	Mandatory (Yes or No)
Person Name	Used to search policies to which a particular person is associated. **Note:** This field appears when the **Person Name/Person Identifier** option is selected from the **Search By** list.	No
Person Identifier Type	Used to indicate the person identifier type. **Note:** This field appears when the **Person Name/Person Identifier** option is selected from the **Search By** list.	Yes (Conditional) **Note:** If you specify the person identifier as a search criteria, you have to select the person identifier type.
Person Identifier	Used to search policies to which a person is associated. **Note:** This field appears when the **Person Name/Person Identifier** option is selected from the **Search By** list.	Yes (Conditional) **Note:** If you specify the person identifier type as a search criteria, you have to specify the person identifier.
Characteristic Type	Used to search policies for which a particular characteristic type is defined. **Note:** This field appears when the **Policy Characteristics** option is selected from the **Search By** list. The list includes only those characteristic types where the characteristic entity is set to **Policy**.	Yes (Conditional) **Note:** This field is required when you are searching for a policy using a characteristic.
Characteristic Value	Used to search policies with a particular characteristic value. **Note:** This field appears when the characteristic type is selected. If you select a predefined characteristic type, the **Search** (🔍) icon appears corresponding to the **Characteristic Value** field. On clicking the **Search** icon, the **Predefined Characteristic Search** window appears. On specifying the value for a predefined characteristic type, the description of the characteristic value appears corresponding to the **Characteristic Value** field.	Yes (Conditional) **Note:** This field is required when you are searching for a policy using a characteristic.

Note: You must specify at least one search criterion while searching for a policy.

- **Search Results** - On clicking the **Search** button, the search results appear based on the specified search criteria. The **Search Results** section contains the following columns:

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<table>
<tr><th>Column Name</th><th>Column Description</th></tr>
<tr><td>Policy Number</td><td>Displays the policy number.</td></tr>
<tr><td>Policy Information</td><td>Displays additional information about the policy.

Note: It has a link. On clicking the link, the **Policy** screen appears where you can view the details of the respective policy.</td></tr>
<tr><td>Source System</td><td>Indicates the external system from where the policy is originated.</td></tr>
<tr><td>Description</td><td>Displays the description of the policy.</td></tr>
<tr><td>Start Date</td><td>Displays the date from when the policy is effective.</td></tr>
<tr><td>End Date</td><td>Displays the date till when the policy is effective.</td></tr>
<tr><td>Status</td><td>Indicates the status of the policy. If the policy is created using the C1-POLICY business object, the valid values are:
• Pending
• In Force/Active
• Pending Cancellation
• Canceled
• Pending Reinstatement
• Reinstated
• Pending Termination
• Terminated
However, if the policy is created using the C1-ASOPolicy business object, the valid values are:
• Pending
• In Force/Active
• Runout
• Post Runout</td></tr>
<tr><td>Main Customer</td><td>This column displays different data depending on whether you search for a policy using the policy or person details. The following table describes this column:
<table><tr><th>If you search for a policy using...</th><th>Then...</th></tr><tr><td>The Policy Date/Policy Type/ Status, Source System/Policy Number/ Description, or Policy Characteristics option</td><td>The Main Customer column displays the name of the person who is the main customer of the policy. In addition, this column has a context menu which helps in navigating to other screens in the application.

Note: It has a link. On clicking the link, the **Person** screen appears where you can view the details of the respective person.</td></tr><tr><td>The Person Name/Person Identifier option</td><td>The Main Customer column indicates whether the person is the main customer of the policy. The valid values are:
• Yes</td></tr></table></td></tr>
</table>

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Column Name	Column Description
	If you search for a policy using... / **Then...** • No
Person Information	Indicates the person who is associated with the policy. In addition, this column has a context menu which helps in navigating to other screens in the application. **Note:** It has a link. On clicking the link, the **Person** screen appears where you can view the details of the respective person. This column appears when the **Person Name/Person Identifier** option is selected from the **Search By** list.
Policy Person Role	Indicates the role using which the person is associated with the policy. **Note:** This column appears when the **Person Name/Person Identifier** option is selected from the **Search By** list.

Note: Pagination is used to display limited number of records in the **Search Results** section. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

Related Topics

For more information on...	See...
How to search for a policy	Searching for a Policy on page 239
How to define a policy	Defining a Policy on page 240
How to view the details of a policy	Viewing the Policy Details on page 240

Searching for a Policy

Prerequisites

To search for a policy, you should have:

- Policy types and person identifier types defined in the application
- Values defined for the **C1-SourceSystemLookup** extendable lookup
- Characteristic types defined in the application (where the characteristic entity is set to **Policy**)

Procedure

To search for a policy:

1. Click the **Menu** link in the **Application** toolbar.
   A list appears.
2. From the **Main** menu, select **Customer Management** and then click **Policy**.
   A sub-menu appears.
3. Click the **Search** option from the **Policy** sub-menu.
   The **Policy** screen appears.
4. Enter the search criteria in the **Search Policy** zone.

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> **Note:** ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.

5. Click **Search**.
   A list of policies that meet the search criteria appears in the **Search Results** section.

Related Topics

For more information on...	See...
Policy screen	Policy (Used for Viewing) on page 247
Search Policy zone	Search Policy on page 235

Viewing the Policy Details

Procedure

To view the details of a policy:

1. Search for the policy in the **Policy** screen.
2. In the **Search Results** section, click the link in the **Policy Information** column corresponding to the policy *w*hose details you want to view.
   The **Policy** screen appears.
3. Ensure that the **Main** tab is selected.
4. View the details of the policy in the **Policy** zone.

Related Topics

For more information on...	See...
How to search for a policy	Searching for a Policy on page 239
Policy screen	Policy (Used for Viewing) on page 247
Policy zone	Policy on page 247

Defining a Policy

Oracle Revenue Management and Billing enables you to define a policy for the fully-insured and self-funded health insurance business. You can define a fully-insured group policy using a policy type where the policy category is set to **Fully-Insured Group** or **Fully-Insured Individual**. However, you can define a self-funded policy using a policy type where the policy category is set to **Self-Funded**.

> **Note:** At present, the **Fully-Insured Individual** policy category is not supported in the system.

Prerequisites

To define a policy, you should have:

- Policy types defined in the application.
- Values defined for the **C1-SourceSystemLookup** extendable lookup.

> **Note:** This prerequisite is applicable only when you want to define a fully-insured group policy.

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- Values defined for the **RUNOUT_ADM_OPT_FLG** lookup field.

Note: This prerequisite is applicable when you want to define a self-funded policy.

Procedure

To define a policy:

1. Click the **Menu** link in the **Application** toolbar.
   A list appears.
2. From the **Main** menu, select **Customer Management** and then click **Policy**.
   A sub-menu appears.
3. Click the **Add** option from the **Policy** sub-menu.

   The **Select Policy Type** screen appears. It contains the following field:

Field Name	Field Description	Mandatory (Yes or No)
Policy Type	Used to indicate the policy type using which you want to create a policy. **Note:** If you want to create a fully-insured group policy, you must select a policy type where the policy category is set to **Fully-Insured Group** or **Fully-Insured Individual**. However, if you want to create a self-funded policy, you must select a policy type where the policy category is set to **Self-Funded**.	Yes

Tip: Alternatively, you can access this screen by clicking the **Add** button in the **Page Title** area of the **Policy** screen.

4. Select the required policy type from the respective field.
5. Click **OK**.

   The **Policy** screen appears. It contains the following sections:

   - **Main** - Used to specify the basic details about the policy.
   - **Persons** - Used to associate persons with the policy.
   - **Characteristics** - Used to define the characteristics for the policy.

   The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Policy Type	Indicates the policy type using which you are defining the policy.	Not applicable
Policy Number	Used to specify the policy number.	Yes
Description	Used to specify the description for the policy.	Yes
Source System	Used to indicate the external system from where the policy is originated. **Note:** This field appears when you are defining a policy using a policy type where the policy category is set to **Fully-Insured Group** or **Fully-Insured Individual**.	Yes
Start Date	Used to specify the date from when the policy is effective.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The policy start date cannot be later than the policy end date.	
End Date	Used to specify the date till when the policy is effective. **Note:** The policy end date cannot be earlier than the policy start date.	Yes
Runout End Date	Used to specify the date when the runout period of the self-funded policy ends. **Note:** The runout end date cannot be earlier than or equal to the policy end date. This field appears when you are defining a policy using a policy type where the policy category is set to **Self-Funded**.	No
Runout Administration Fees	Used to indicate whether the administration fees must be charged when the claim transaction for the self-funded policy is processed in the runout period. The valid values are: • None • Percentage of Claim **Note:** At present, this field is used only for the informational purposes and is not considered during the billable charge creation for the claim transactions which are received in the runout period of the policy. This field appears when you are defining a policy using a policy type where the policy category is set to **Self-Funded**.	No
Advance Level Funding Eligibility	Indicates whether the self-funded policy is eligible for the advance billing feature of level funding. **Note:** This is a read-only field. By default, the value is set to **No**. You can edit the advance level funding eligibility only through a health care inbound message. This field appears when you are defining a policy using a policy type where the policy category is set to **Self-Funded**.	Not applicable
Advance Deposit Applicability	Used to indicate whether the advance deposit is applicable for the policy.	No

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Field Name	Field Description	Mandatory (Yes or No)
	Note: This field is required only when the advance deposit level of the respective policy holder (i.e., parent customer) is set to **POLI**. However, this field is not mandatory. This field appears only when you create a policy using a policy type where the policy category is set to **Fully-Insured Group**.	
Advance Deposit Amount	Used to specify the advance deposit amount that will be parked at the policy level. **Note:** You must specify a positive value in this field. This field appears only when you create a policy using a policy type where the policy category is set to **Fully-Insured Group**.	Yes (Conditional) **Note:** This field is required when the **Advance Deposit Applicability** option is selected.
Advance Deposit Grace Days	Used to specify the grace days. The system then uses the grace days to derive the grace period within which the advance deposit should be received from the group customer for the policy. While calculating the grace period, the system considers the policy start date as the grace start date. Once the grace start date is derived, the system calculates the grace end date (i.e., grace start date + grace days). For example, if a parent customer is the policy holder of the P1 policy (01-Jan-2022 to 31-Dec-2022) and advance deposit grace days is set to 6 days, then the system considers 01-Jan-2022 as the grace start date and sets the grace end date to 07-Jan-2022. **Note:** You must specify an integer value in this field. This field appears only when you create a policy using a policy type where the policy category is set to **Fully-Insured Group**.	Yes (Conditional) **Note:** This field is required when the **Advance Deposit Applicability** option is selected.
Advance Deposit Account	Used to indicate the account of the parent customer where the advance deposit is parked for the policy.	Yes (Conditional)

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Field Name	Field Description	Mandatory (Yes or No)
	Note: This field appears only when you create a policy using a policy type where the policy category is set to **Fully-Insured Group**. You must specify an account with the account relationship type that is specified in the **Advance Deposit Account Relationship Type** attribute of the delinquency process preference. The system considers the delinquency process preference which is specified in the **Delinquency Process Field Mapping** option type of the **DELINPROC** feature configuration. For more information about the feature configuration, see Setting the DELINPROC Feature Configuration on page 4442. The **Search** (🔍) icon appears corresponding to the **Advance Deposit Account** field. On clicking the **Search** icon, the **Account Search** window appears.	**Note:** This field is required when the **Advance Deposit Applicability** option is selected.

6. Enter the required details in the **Main** section.
7. Associate the required persons with the policy.

Note: While defining a policy, you must associate a person who is the main customer of the policy.

8. Define the characteristics for the policy, if required.
9. Click **Save**.
   The policy is defined and its status is set to **Pending**.

Related Topics

For more information on...	See...
Policy screen	Policy (Used for Viewing) on page 247
How to associate a person with a policy	Associating a Person with a Policy on page 244
How to define a characteristic for a policy	Defining a Characteristic for a Policy on page 246

Associating a Person with a Policy

Prerequisites

To associate a person with a policy, you should have:

- Required persons defined in the application
- Required policy person roles defined in the application

Procedure

To associate a person with a policy:

1. Ensure that the **Persons** section is expanded when you are defining or editing a policy.

   The **Persons** section contains the following fields in a grid:

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Field Name	Field Description	Mandatory (Yes or No)
Person	Used to indicate the person that you want to associate with the policy. **Note:** The **Search** (🔍) icon appears corresponding to this field. On clicking the **Search** icon, the **Person Search** window appears. On specifying the person ID, the person name appears corresponding to the **Person** field.	Yes
Sequence	Used to specify the sequence number for the associated person.	Yes
Policy Person Role	Used to indicate the role of a person in the policy.	Yes
Main Customer	Used to indicate whether the person is the main customer of the policy. **Note:** At a time, only one person can be the main customer of the policy.	Yes (Conditional) **Note:** You must select this option while associating a person who is the main customer of the policy.
Start Date	Used to specify the date from when the person is associated with the policy. **Note:** The start date cannot be later than the end date. The start date cannot be earlier than the policy start date and later than the policy end date.	Yes
End Date	Used to specify the date till when the person is associated with the policy. **Note:** The end date cannot be earlier than the start date. The end date cannot be earlier than the policy start date and later than the policy end date. This validation is done when the policy is transition to the status which is not specified in the **Skip Status for Policy Person End Date Validation** parameter of the **C1-POLBOVAL** algorithm. For example, if you set the **Skip Status for Policy Person End Date Validation** parameter of the **C1-POLBOVAL** algorithm to **TERMINATED**, the system will not perform this validation when the status of the policy is changed to **Terminated**.	No

2. Enter the required details in the **Persons** section.

Note: While associating the persons with a policy, you must always ensure that one person is the main customer of the policy.

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3. If you want to associate more than one person with the policy, click the **Add** (+) icon and then repeat step 2.

> **Note:** However, if you want to dissociate a person from the policy, click the **Delete** (🗑) icon corresponding to the person.

4. Click **Save**.
   The persons are associated with the policy.

Related Topics

For more information on...	See...
How to define a policy	Defining a Policy on page 240
How to edit a policy	Editing a Policy on page 258

Defining a Characteristic for a Policy

Prerequisites

To define a characteristic for a policy, you should have:

- Characteristic types defined in the application (where the characteristic entity is set to **Policy**)

Procedure

To define a characteristic for a policy:

1. Ensure that the **Characteristics** section is expanded when you are defining or editing a policy.

   The **Characteristics** section contains the following fields in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Effective Date	Used to specify the date from when the characteristic is effective for the policy. **Note:** The effective date cannot be earlier than the policy start date and later than the policy end date.	Yes (Conditional) **Note:** This field is required when you are defining a characteristic for the policy.
Characteristic Type	Used to indicate the characteristic type. **Note:** The list includes only those characteristic types where the characteristic entity is set to **Policy**.	Yes (Conditional) **Note:** This field is required when you are defining a characteristic for the policy.
Characteristic Value	Used to specify the value for the characteristic type. **Note:** If you select a predefined characteristic type, the **Search** (🔍) icon appears corresponding to the **Characteristic Value** field. On clicking the **Search** icon, the **Predefined Characteristic Search** window appears. On specifying the value for a predefined characteristic type, the description of the characteristic value appears corresponding to the **Characteristic Value** field.	Yes (Conditional) **Note:** This field is required when you are defining a characteristic for the policy.

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2. Enter the required details in the **Characteristics** section.
3. If you want to define more than one characteristic for the policy, click the **Add** (+) icon and then *r*epeat step 2.

> **Note:** However, if you want to remove a characteristic from the policy, click the **Delete** (🗑) icon corresponding to the characteristic.

4. Click **Save**.
   The characteristics are defined for the policy.

Related Topics

For more information on...	See...
How to define a policy	Defining a Policy on page 240
How to edit a policy	Editing a Policy on page 258

Policy (Used for Viewing)

The **Policy** screen allows you to:

- View the details of a fully-insured group or self-funded policy
- Edit the details of a fully-insured group or self-funded policy
- Activate a fully-insured group or self-funded policy
- Add or edit plans in a fully-insured group policy
- Add memberships to a fully-insured group policy plan
- Initiate the termination process for a fully-insured group policy
- Terminate a fully-insured group policy
- Initiate the cancellation process for a fully-insured group policy
- Cancel a fully-insured group policy
- Initiate the reinstatement process for a fully-insured group policy
- Reinstate a fully-insured group policy
- View the log of a fully-insured group or self-funded policy
- Add a log entry for a fully-insured group or self-funded policy

It consists of the following tabs:

- Policy - Main on page 247
- Policy - Plan on page 254
- Policy - Log on page 257

Policy - Main

The **Main** tab displays information about the policy. It contains the following zones:

- Policy on page 247
- Policy Characteristics on page 254

Policy

The **Policy** zone displays the details of the fully-insured group or self-funded policy. It contains the following sections:

- **Main** - Displays basic information about the policy. It contains the following fields:

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Field Name	Field Description
Base Policy Information	Displays information about the base policy. **Note:** This field appears when you are viewing the details of a renewed policy which is created using a policy type where the policy category is set to **Self-Funded**.
Policy Information	Displays information about the policy.
Policy Type	Indicates the policy type using which the policy is created. **Note:** It has a link. On clicking the link, the **Policy Type** screen appears where you can view the details of the respective policy type.
Status	Indicates the status of the policy. If the policy is created using the **C1-POLICY** business object, the valid values are: • Pending • Activate • In Force/Active • Pending Termination • Terminated • Pending Reinstatement • Reinstated • Renewed • Pending Cancellation • Canceled However, if the policy is created using the **C1-ASOPolicy** business object, the valid values are: • Pending • In Force/Active • Runout • Post Runout
Status Reason	Indicates the reason why the policy is terminated. **Note:** It has a link. On clicking the link, the **Status Reason** screen appears where you can view the details of the respective termination reason. This field appears when you are viewing the details of a terminated or reinstated policy which is created using a policy type where the policy category is set to **Fully-Insured Group**.
Policy Number	Displays the policy number.
Description	Displays the description of the policy. **Note:** This field appears when you are viewing the details of a policy where the policy category is set to **Self-Funded**.
Source System	Indicates the external system from where the policy is originated.
Start Date	Displays the date from when the policy is effective.

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<table>
<tr><th>Field Name</th><th>Field Description</th></tr>
<tr><td>End Date</td><td>Displays the date till when the policy is effective.</td></tr>
<tr><td>Renewal Date</td><td>Displays the date when the policy is renewed.

Note: This field appears when you are viewing the details of a policy which is renewed.</td></tr>
<tr><td>Paid Through Date</td><td>Indicates the term end date of the last fully or partially paid term. The system considers the term to be fully paid when the threshold limit is met.

Note:
This field appears when the following conditions are met:
• When you are viewing the details of a policy which is created using a policy type where the policy category is set to Fully-Insured Group.
• When the paid through date is calculated at the policy level.

The paid through date is calculated while freezing or canceling a payment or adjustment depending on whether the required algorithm is attached to the respective system event:
<table>
<tr><th>Entity</th><th>System Event</th><th>Algorithm</th></tr>
<tr><td>Customer Class</td><td>Payment Freeze</td><td>C1-PSPTDCAL</td></tr>
<tr><td>Customer Class</td><td>Payment Cancellation</td><td>C1-PXPTDCAL</td></tr>
<tr><td>Adjustment Type</td><td>Adjustment Freeze</td><td>C1-ADPTDCAL</td></tr>
<tr><td>Adjustment Type</td><td>Adjustment Cancellation</td><td>C1-AXPTDCAL</td></tr>
</table>
The following table indicates when the paid through date is calculated at the policy and/or membership level:
<table>
<tr><th>If the Paid Through Date Calculation Level parameter is set to…</th><th>If the following characteristics are defined for the billable charge or adjustment…</th><th>Then…</th></tr>
<tr><td>P</td><td>C1-POLID</td><td>Paid through date is calculated at the policy level</td></tr>
<tr><td>P</td><td>C1-MPID</td><td>Paid through date is calculated at the policy level</td></tr>
<tr><td>P</td><td>C1-POLID and C1-MPID</td><td>Paid through date is calculated at the policy level</td></tr>
<tr><td>M</td><td>C1-POLID</td><td>Paid through date is not calculated at the membership level</td></tr>
<tr><td>M</td><td>C1-MPID</td><td>Paid through date is calculated at the membership level</td></tr>
<tr><td>M</td><td>C1-POLID and C1-MPID</td><td>Paid through date is calculated at the membership level</td></tr>
<tr><td>P, M</td><td>C1-POLID</td><td>Paid through date is calculated at the policy level</td></tr>
</table>
</td></tr>
</table>

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<table>
<tr><th>Field Name</th><th>Field Description</th></tr>
<tr><td></td><td>
<table>
<tr><th>If the Paid Through Date Calculation Level parameter is set to…</th><th>If the following characteristics are defined for the billable charge or adjustment…</th><th>Then…</th></tr>
<tr><td>P, M</td><td>C1-MPID</td><td>Paid through date is calculated at both the policy and membership levels</td></tr>
<tr><td>P, M</td><td>C1-POLID and C1-MPID</td><td>Paid through date is calculated at both the policy and membership levels</td></tr>
</table>
</td></tr>
<tr><td>Runout End Date</td><td>Displays the date when the runout period of the self-funded policy ends.

Note: This field appears when you are viewing the details of a policy which is created using a policy type where the policy category is set to Self-Funded.</td></tr>
<tr><td>Runout Administration Fees</td><td>Indicates whether the administration fees must be charged when the claim transaction for the self-funded policy is processed in the runout period. The valid values are:
• None
• Percentage of Claim

Note: This field appears when you are viewing the details of a policy which is created using a policy type where the policy category is set to Self-Funded.</td></tr>
<tr><td>Advance Level Funding Eligibility</td><td>Indicates whether the self-funded policy is eligible for advance billing feature of level funding.

Note: This field appears when you are viewing the details of a policy which is created using a policy type where the policy category is set to Self-Funded.</td></tr>
<tr><td>Advance Deposit Applicability</td><td>Indicates whether the advance deposit is applicable for the policy.

Note: This field appears only when the policy is created using a policy type where the policy category is set to Fully-Insured Group.</td></tr>
<tr><td>Advance Deposit Amount</td><td>Displays the advance deposit amount.

Note: This field appears only when the Advance Deposit Applicability option is selected.</td></tr>
<tr><td>Advance Deposit Grace Days</td><td>Displays the grace days used for calculating the advance deposit grace period.

Note: This field appears only when the Advance Deposit Applicability option is selected.</td></tr>
<tr><td>Advance Deposit Account</td><td>Indicates the account of the parent customer where the advance deposit is parked for the policy. In addition, a context menu (⊙) icon appears corresponding to this field which helps in navigating to other screens in the application.</td></tr>
</table>

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Field Name	Field Description
	Note: This field appears only when the **Advance Deposit Applicability** option is selected. It has a link. On clicking the link, the **Account** screen appears where you can view the details of the respective account.

- **Persons** - Lists the persons which are associated with the policy. It contains the following columns:

Column Name	Column Description
Person Information	Indicates the person who is associated with the policy. In addition, this column has a context menu which helps in navigating to other screens in the application. **Note:** It has a link. On clicking the link, the **Person** screen appears where you can view the details of the respective person.
Sequence	Displays the sequence number of the associated person.
Policy Person Role	Indicates the role of the person in the policy.
Main Customer	Indicates whether the person is the main customer of the policy.
Start Date	Displays the date from when the person is associated with the policy.
End Date	Displays the date till when the person is associated with the policy.

- **Record Actions** - This section contains the following buttons:

Button Name	Button Description
Edit	Used to edit the details of the fully-insured group or self-funded policy. **Note:** The **Edit** button appears only when a policy of the respective category is in either of the following status:

Policy Category	Status
Fully-Insured Group	• In Force/Active • Canceled • Pending Cancellation • Pending • Pending Reinstatement • Pending Termination • Terminated
Self-Funded	• In Force/Active • Pending • Runout

Activate	Used to activate the fully-insured group or self-funded policy.

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<table>
<tr><th>Button Name</th><th>Button Description</th></tr>
<tr><td></td><td>Note:
The Activate button appears when a policy of the respective category is in either of the following status:<table><tr><th>Policy Category</th><th>Status</th></tr><tr><td>Fully-Insured Group</td><td>• Pending
• Pending Termination</td></tr><tr><td>Self-Funded</td><td>• Pending</td></tr></table></td></tr>
<tr><td>Initiate Cancellation</td><td>Used to initiate the cancellation process for the fully-insured group policy.</td></tr>
<tr><td></td><td>Note: The Initiate Cancellation button appears when the fully-insured group policy is in the In Force/Active status.</td></tr>
<tr><td>Cancel</td><td>Used to cancel the fully-insured group policy.</td></tr>
<tr><td></td><td>Note: The Cancel button appears when the fully-insured group policy is in the Pending Cancellation status.</td></tr>
<tr><td>Initiate Termination</td><td>Used to initiate the termination process for the fully-insured group policy.</td></tr>
<tr><td></td><td>Note: The Initiate Termination button appears when the fully-insured group policy is in the In Force/Active status.</td></tr>
<tr><td>Terminate</td><td>Used to terminate the fully-insured group policy.</td></tr>
<tr><td></td><td>Note: The Terminate button appears when the fully-insured group policy is in the In Force/Active, Pending Reinstatement, or Pending Termination status.</td></tr>
<tr><td>Initiate Reinstatement</td><td>Used to initiate the reinstatement process for the terminated policy.</td></tr>
<tr><td></td><td>Note: The Initiate Reinstatement button appears when the fully-insured group policy is in the Terminated status.</td></tr>
<tr><td>Reinstate</td><td>Used to reinstate the terminated policy.</td></tr>
<tr><td></td><td>Note: The Reinstate button appears when the fully-insured group policy is in the Pending Reinstatement or Terminated status.</td></tr>
<tr><td>Runout</td><td>Used to transition the self-funded policy to the Runout status.</td></tr>
</table>

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Button Name	Button Description
	Note: The **Runout** button appears when the self-funded policy is in the **In Force/Active** status. You cannot transition a self-funded policy to the **Runout** status when: • The self-funded policy is renewed. • The runout end date is not specified. • The policy end date is earlier than the system date.

- **Record Information** - This section contains the following fields:

Field Name	Field Description
Business Object	Indicates the business object using which the policy is created. In addition, a context menu appears corresponding to this field which helps in navigating to other screens in the application. **Note:** It has a link. On clicking the link, the **Business Object** screen appears where you can view the details of the respective business object.
Status Date/Time	Displays the date and time when the policy status is updated.
Create Date/Time	Displays the date and time when the policy is created.

- **Termination Information** - Displays the termination details of the fully-insured group policy. It appears when the policy is in the **Pending Termination** status. It contains the following fields:

Field Name	Field Description
Terminate Date	Displays the date when you want to terminate the policy.
Terminate Reason	Indicates the reason why the termination process is initiated for the policy. **Note:** It has a link. On clicking the link, the **Status Reason** screen appears where you can view the details of the respective termination reason.

- **Reinstate Information** - Displays the reinstatement details of the terminated policy. It appears when the policy is in the **Pending Reinstatement** status. It contains the following fields:

Field Name	Field Description
Reinstate Reason	Indicates the reason why you want to reinstate the fully-insured group policy. **Note:** It has a link. On clicking the link, the **Status Reason** screen appears where you can view the details of the respective reinstatement reason.

Related Topics

For more information on...	See...
How to edit a policy	Editing a Policy on page 258
How to activate a policy	Activating a Policy on page 257

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For more information on...	See...
How to initiate a cancellation request for a fully-insured group policy	Initiating the Cancellation Process for a Fully-Insured Group Policy
How to cancel a fully-insured group policy	Canceling a Fully-Insured Group Policy
How to initiate a termination request for a fully-insured group policy	Initiating the Termination Process for a Fully-Insured Group Policy on page 263
How to terminate a fully-insured group policy	Terminating a Fully-Insured Group Policy on page 264
How to initiate a reinstatement request for a fully-insured group policy	Initiating the Reinstatement Process for a Fully-Insured Group Policy on page 264
How to reinstate a fully-insured group policy	Reinstating a Fully-Insured Group Policy on page 265

Policy Characteristics

The **Policy Characteristics** zone lists the characteristics of the fully-insured group or self-funded policy. It contains the following columns:

Column Name	Column Description
Effective Date	Displays the date from when the characteristic is effective for the policy.
Characteristic Type	Indicates the characteristic type.
Characteristic Value	Displays the value of the characteristic type.
Description	Displays the description of the characteristic value.
	Note: The data appears in this column when the type of characteristic value is set to **Predefined Value**.

You can filter the list using the **Effective Date** field available in the **Filter** area. By default, the **Filter** area is hidden. You can view the **Filter** area by clicking the **Filters** (▽) icon in the upper right corner of this zone.

Policy - Plan

The **Plan** tab lists the plans defined for the policy and memberships defined for each policy plan. It contains the following zones:

- Plans on page 254
- Memberships on page 256

Plans

The **Plans** zone lists the plans which are defined in the policy. It contains the following columns:

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Column Name	Column Description
Plan Information	Displays information about the policy plan. In addition, a context menu appears corresponding to this column which helps in navigating to other screens in the application. **Note:** It has a link. On clicking the link, the **Policy Plan** screen appears where you can view the details of the respective policy plan.
Price Item Information	Indicates the price item to which the policy plan is directly associated. **Note:** It has a link. On clicking the link, the **Price Item** screen appears where you can view the details of the respective price item.
Plan Number	Displays the plan number.
Plan Name	Displays the description of the policy plan.
Benefit Type	Indicates the type of health insurance plan. The valid values are: • Commercial • Medicare Affiliated
Start Date	Displays the date from when the policy plan is effective.
End Date	Displays the date till when the policy plan is effective.
Edit	On clicking the **Edit** (✎) icon, the **Plan** screen appears where you can edit the details of the policy plan.

Note: Pagination is used to display limited number of records in this zone. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

You can define a new policy plan by clicking the **Add** link in the upper-right corner of this zone. On clicking the **Broadcast** (📡) icon corresponding to a policy plan, the **Memberships** zone appears.

Note: Ideally, you define plans in a policy which is created using a policy type where the policy category is set to **Fully-Insured Group** or **Fully-Insured Individual**.

You can filter the list using various search criteria (such as, **Price Item**, **Plan Number**, and **Effective From**) available in the **Filter** area. By default, the **Filter** area is hidden. You can view the **Filter** area by clicking the **Filters** (▽) icon in the upper-right corner of this zone.

Related Topics

For more information on...	See...
How to define a plan for a fully-insured group policy	Defining a Plan for a Fully-Insured Group Policy on page 269
How to edit a plan of a fully-insured group policy	Editing a Plan of a Fully-Insured Group Policy on page 275
Memberships zone	Memberships on page 256
How to view the plans of a fully-insured group policy	Viewing the Plans of a Fully-Insured Group Policy on page 266
How to view the memberships of a fully-insured group policy plan	Viewing the Membership Details of a Fully-Insured Group Policy Plan on page 268

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Memberships

The **Memberships** zone lists the memberships which are defined for the policy plan. It contains the following columns:

Column Name	Column Description
Start Date	Displays the date from when the membership is effective.
End Date	Displays the date till when the membership is effective.
Membership Information	Displays information about the membership. **Note:** It has a link. On clicking the link, the **Membership** screen appears where you can view the details of the respective membership.
Enrolled Members	Displays the number of members who have enrolled in the policy plan.
Status	Indicates the status of the membership. The valid values are: • Active • Inactive • Terminated
Membership Type	Indicates the type of membership. The valid values are: • COBRA • Medicare • Retiree
Benefits	On clicking the **Benefits** (🔗) icon, the **Benefit** screen appears where you can view the Membership benefits of the member persons who belong to the membership. **Note:** The **Benefits** icon appears when a Membership benefit is defined for a member person who belongs to the membership.
Membership ID	Displays the membership ID.

Note: Pagination is used to display limited number of records in this zone. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

You can define a new membership by clicking the **Add** link in the upper right corner of this zone.

By default, the **Memberships** zone does not appear in the **Plan** tab. It appears when you click the **Broadcast** (📡) icon corresponding to the policy plan in the **Plans** zone.

You can filter the list using various search criteria (such as, **External Membership ID**, **Effective From**, **Person Name**, **Effective Till**, and **Status**) available in the **Filter** area. By default, the **Filter** area is hidden. You can view the **Filter** area by clicking the **Filters** (▽) icon in the upper right corner of this zone.

You can change the layout of this zone. For more information on how to change the layout, see Changing the Layout on page 4410

Related Topics

For more information on...	See...
How to define a membership for a fully-insured group policy plan	Defining a Membership for a Fully-Insured Group Policy Plan on page 294

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Policy - Log

The **Log** tab contains the following zone:

- Policy Log on page 257

Policy Log

The **Policy Log** zone lists the complete trail of actions performed on the policy. It contains the following columns:

Column Name	Column Description
Creation Date Time	Displays the date and time when the action was performed on the policy.
Details	Displays the details about the action performed on the policy.
User	Indicates the user who has performed the action on the policy.
Log Type	Indicates the type of log.
Related Object	Indicates the object or entity which is created when the action is performed on the policy.
	Note: It contains a link. On clicking the link, the screen appears where you can view the details of the respective related object.
Status Reason	Indicates the reason why the status of the policy is changed.

Note: You can manually add a log entry for the policy by clicking the **Add Log Entry** link in the upper right corner of the **Policy Log** zone.

Related Topics

For more information on...	See...
How to view the log of a policy	Viewing the Log of a Policy on page 278
How to add a log entry for a policy	Adding a Log Entry for a Policy on page 278

Activating a Policy

Procedure

To activate a policy:

1. Search for the policy in the **Policy** screen.
2. In the **Search Results** section, click the link in the **Policy Information** column corresponding to the policy that you want to activate.
   The **Policy** screen appears.
3. Ensure that the **Main** tab is selected.
4. Click the **Activate** button in the **Policy** zone.
   The status of the policy is changed to **In Force/Active**.

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Note:

The **Activate** button appears only when a policy of the respective category is in either of the following status:

Policy Category	Status
Fully-Insured Group or Fully-Insured Individual	• Pending • Pending Termination
Self-Funded	• Pending

Related Topics

For more information on...	See...
How to search for a policy	Searching for a Policy on page 239
Policy screen	Policy (Used for Viewing) on page 247
Policy zone	Policy on page 247

Editing a Policy

Prerequisites

To edit a policy, you should have:

- Values defined for the **C1-SourceSystemLookup** extendable lookup

  Note: This prerequisite is applicable only when you want to define a fully-insured group policy.

- Values defined for the **RUNOUT_ADM_OPT_FLG** lookup field

  Note: This prerequisite is applicable when you want to define a self-funded policy.

Procedure

To edit a policy:

1. Search for the policy in the **Policy** screen.
2. In the **Search Results** section, click the link in the **Policy Information** column corresponding to the policy whose details you want to edit.
   The **Policy** screen appears.
3. Ensure that the **Main** tab is selected.
4. Click the **Edit** button in the **Policy** zone.

   The **Policy** screen appears. It contains the following sections:

   - **Main** - Used to specify the basic details about the policy.
   - **Persons** - Used to associate persons with the policy.
   - **Characteristics** - Used to define the characteristics for the policy.

   The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Policy Information	Displays information about the policy.	Not applicable

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Field Name	Field Description	Mandatory (Yes or No)
Policy Type	Indicates the policy type using which the policy is defined.	Not applicable
Status	Indicates the status of the policy. The valid values are: • Pending • In Force/Active • Runout • Post Runout **Note:** This field appears when you are editing a policy which is created using a policy type where the policy category is set to **Self-Funded**.	Not applicable
Policy Number	Used to specify the policy number.	Yes
Description	Used to specify the description for the policy.	Yes
Source System	Used to indicate the external system from where the policy is originated. **Note:** This field appears when you are editing a policy which is created using a policy type where the policy category is set to **Fully-Insured Group** or **Fully-Insured Individual**.	Yes
Start Date	Used to specify the date from when the policy is effective. **Note:** The policy start date cannot be later than the policy end date. You cannot change the start date of a self-funded policy when it is in the **In Force/Active**, **Runout**, or **Post Runout** status.	Yes
End Date	Used to specify the date till when the policy is effective. **Note:** The policy end date cannot be earlier than the policy start date. You cannot change the end date when the self-funded policy is in the **Runout** status. You cannot set the end date of a self-funded policy to a date which is later than or equal to the start date of a pricing rule which is defined for the **Runout** status. You cannot change the end date when the policy is renewed.	Yes
Runout End Date	Used to specify the date when the runout period of the self-funded policy ends.	No

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Field Name	Field Description	Mandatory (Yes or No)
	Note: This field appears when you are editing a policy which is created using a policy type where the policy category is set to **Self-Funded**. The runout end date cannot be earlier than or equal to the policy end date. The runout end date cannot be earlier than or equal to the system date when the policy is in the **Runout** status. You cannot remove the runout end date when the policy is in the **Runout** or **Post Runout** status. You cannot set the runout end date to a date which is later than or equal to the start date of a pricing rule which is defined for the **Post Runout** status. You cannot set the runout end date to a date which is earlier than the end date of a pricing rule which is defined for the **Runout** status.	
Runout Administration Fees	Used to indicate whether the administration fees must be charged when the claim transaction for the self-funded policy is processed in the runout period. The valid values are: • None • Percentage of Claim **Note:** At present, this field is used only for the informational purposes and is not considered during the billable charge creation for the claim transactions which are received in the runout period of the policy. This field appears when you are editing a policy which is created using a policy type where the policy category is set to **Self-Funded**.	No
Advance Level Funding Eligibility	Indicates whether the self-funded policy is eligible for the advance billing feature of level funding. **Note:** This is a read-only field. By default, the value is set to **No**. You can edit the advance level funding eligibility only through a health care inbound message. This field appears when you are defining a policy using a policy type where the policy category is set to **Self-Funded**.	Not applicable
Advance Deposit Applicability	Used to indicate whether the advance deposit is applicable for the policy.	No

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Field Name	Field Description	Mandatory (Yes or No)
	Note: This field is required only when the advance deposit level of the respective policy holder (i.e., parent customer) is set to **POLI**. However, this field is not mandatory. This field appears only when you create a policy using a policy type where the policy category is set to **Fully-Insured Group**.	
Advance Deposit Amount	Used to specify the advance deposit amount.	Yes (Conditional)
	Note: You must specify a positive value in this field. This field appears only when you create a policy using a policy type where the policy category is set to **Fully-Insured Group** .	**Note:** This field is required when the **Advance Deposit Applicability** option is selected.
Advance Deposit Grace Days	Used to specify the grace days. The system then uses the grace days to derive the grace period within which the advance deposit should be received from the group customer for the policy. While calculating the grace period, the system considers the policy start date as the grace start date. Once the grace start date is derived, the system calculates the grace end date (i.e., grace start date + grace days). For example, if a parent customer is the policy holder of the P1 policy (01-Jan-2022 to 31-Dec-2022) and advance deposit grace days is set to 6 days, then the system considers 01-Jan-2022 as the grace start date and sets the grace end date to 07-Jan-2022.	Yes (Conditional) **Note:** This field is required when the **Advance Deposit Applicability** option is selected.
	Note: You must specify an integer value in this field. This field appears only when you create a policy using a policy type where the policy category is set to **Fully-Insured Group**.	
Advance Deposit Account	Used to indicate the account of the parent customer where the advance deposit is parked for the policy.	Yes (Conditional)

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Field Name	Field Description	Mandatory (Yes or No)
	Note: This field appears only when you create a policy using a policy type where the policy category is set to **Fully-Insured Group**. You must specify an account with the account relationship type that is specified in the **Advance Deposit Account Relationship Type** attribute of the delinquency process preference. The system considers the delinquency process preference which is specified in the **Delinquency Process Field Mapping** option type of the **DELINPROC** feature configuration. For more information about the feature configuration, see Setting the DELINPROC Feature Configuration on page 4442. The **Search** (🔍) icon appears corresponding to the **Advance Deposit Account** field. On clicking the **Search** icon, the **Account Search** window appears.	**Note:** This field is required when the **Advance Deposit Applicability** option is selected.

Note:

The **Edit** button appears when a policy of the respective category is in either of the following status:

Policy Category	Status
Fully-Insured Group or Fully-Insured Individual	• In Force/Active • Canceled • Pending Cancellation • Pending • Pending Reinstatement • Pending Termination • Terminated
Self-Funded	• In Force/Active • Pending • Runout

5. Modify the required details in the **Main** section.
6. Associate the persons with the policy, if required.

Note: While editing a policy, you must ensure that one person is associated as the main customer of the policy.

7. Define, edit, or remove characteristics of the policy, if required.
8. Click **Save**.
   The changes made to the policy are saved.

Related Topics

For more information on...	See...
How to search for a policy	Searching for a Policy on page 239
Policy screen	Policy (Used for Viewing) on page 247

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For more information on...	See...
Policy zone	Policy on page 247
How to associate a person with a policy	Associating a Person with a Policy on page 244
How to define a characteristic for a policy	Defining a Characteristic for a Policy on page 246

Manually Changing the Status of a Self-Funded Policy to Runout

Prerequisites

To manually change the status of a self-funded policy to **Runout**, you should have:

- Runout end date specified in the self-funded policy.

Procedure

To manually change the status of a self-funded policy to **Runout**:

1. Search for the self-funded policy in the **Policy** screen.
2. In the **Search Results** section, click the link in the **Policy Information** column corresponding to the *s*elf-funded policy whose status you want to change.
   The **Policy** screen appears.
3. Ensure that the **Main** tab is selected.
4. Click the **Runout** button in the **Policy** zone.
   The status of the self-funded policy is changed to **Runout**.

> **Note:**
>
> The **Runout** button appears when the self-funded policy is in the **In Force/Active** status.
>
> You cannot transition a self-funded policy to the **Runout** status when:
>
> - The self-funded policy is renewed.
> - The runout end date is not specified.
> - The policy end date is earlier than the system date.

Related Topics

For more information on...	See...
How to search for a self-funded policy	Searching for a Policy on page 239
Policy screen	Policy (Used for Viewing) on page 247
Policy zone	Policy on page 247

Renewing a Self-Funded Policy of a Bill Group

Oracle Revenue Management and Billing enables you to renew a self-funded policy which is associated with a bill group. However, note that you can renew a self-funded policy when it is in the **In Force/Active** status and is not yet renewed. For more information, see Self-Funded Policy Renewal on page 339.

Procedure

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To renew a self-funded policy of a bill group:

1. Search for the bill group who is associated with the self-funded policy (which you want to renew) in the **Customer 360° View** screen.
2. In the **Search Results** section, click the **View** (🔗) icon corresponding to the bill group whose details you want *t*o view.
   The **Person** tab appears in the **Customer 360° Information** screen.
3. Click the **Pricing Information** tab.
   The **Pricing Information** tab appears.
4. In the **Bill Group Self-Funded Policy Information** zone, click the **Renew** (📋) icon in the **Renew** column *c*orresponding to the self-funded policy which you want to renew.

   The **Policy** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details about the renewed policy.
   - **Persons** - Used to associate or disassociate persons from the renewed policy.

     Note: You cannot disassociate persons who are associated with the base policy using a policy person role which is specified in the **Bill Group Policy Person Role** or **Parent Customer Policy Person Role** option type of the **C1-ASOBLLNG** feature configuration.
   - **Characteristics** - Used to define the characteristics for the renewed policy.

   The **Main** section contains the following fields:

Field Name	**Field Description**	**Mandatory (Yes or No)**
Base Policy Information	Indicates the policy which you want to renew.	Not applicable
Policy Type	Indicates the policy type using which the base policy is created.	Not applicable
Policy Number	Used to specify the policy number of the renewed policy.	Yes
Description	Used to specify the description for the renewed policy.	Yes
Start Date	Used to specify the date from when the renewed policy is effective. **Note:** By default, the start date is set to the base policy's end date plus one day. For example, if the base policy's end date is 12-31-2018, then by default, the renewed policy's start date is set to 01-01-2019. The start date cannot be later than the end date. The start date cannot be earlier than or equal to the base policy's end date.	Yes
End Date	Used to specify the date till when the renewed policy is effective. **Note:** The end date cannot be earlier than the start date.	Yes
Runout End Date	Used to specify the date when the runout period of the renewed policy ends.	No

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The runout end date cannot be earlier than or equal to the renewed policy's end date.	
Runout Administration Fees	Used to indicate whether the administration fees must be charged when the claim transaction for the policy is processed in the runout period. The valid values are: • None • Percentage of Claim **Note:** At present, this field is used only for the informational purposes and is not considered during the billable charge creation for the claim transactions which are received in the runout period of the policy.	No
Copy Pricing Rules	Used to indicate whether you want to copy the pricing rules of the base policy to the renewed policy. If you select the **Copy Pricing Rules** option, the system copies the following pricing rules of the base policy: • Claim • Retention Type Claim Based • Retention Type Enrollment Based • Recurring Flat Fees • Ancillary **Note:** While copying a pricing rule, the start and end dates of the new pricing rule are set to the renewed policy's start and end dates, respectively. If there are multiple pricing rules which are created using the same pricing rule type and are effective for the different date range, the system copies only one pricing rule from the base policy with the latest date range.	No
Copy Advance Level Funding Eligibility	Used to indicate whether you want to copy the advance level funding eligibility value of the base policy to the renewed policy. **Note:** If the **Copy Advance Level Funding Eligibility** option is set to **Y** in the base policy, the system activates the renewed self-funded policy on the policy renewal even if the renewed policy's start date is later than the system date. This field appears only when you want to renew a self-funded policy.	No

Note: The **Renew** icon appears when the policy is in the **In Force/Active** status and it is not yet renewed.

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5. Enter the required details in the **Main** section.
6. Associate or disassociate persons from the renewed policy, if required.
7. Define, edit, or remove characteristics of the renewed policy, if required.
8. Click **Save**.
   The renewed policy is created in the **Pending** status. The renewal date is stamped corresponding to the base policy in the **Bill Group Self-Funded Policy Information** zone.

Related Topics

For more information on...	See...
How to search for a person	Searching for a Person on page 597
Customer 360° Information screen	Customer 360° Information on page 607
Pricing Information tab	Customer 360° Information - Pricing Information on page 641
Bill Group Self-Funded Policy Information zone	Bill Group Self-Funded Policy Information on page 648
How to associate a person with a policy	Associating a Person with a Policy on page 244
How to define a characteristic for a policy	Defining a Characteristic for a Policy on page 246
How to setup the **C1-ASOBLLNG** feature configuration	Setting the C1-ASOBLLNG Feature Configuration on page 4417

Viewing the Log of a Policy

Procedure

To view the log of a policy:

1. Search for the policy in the **Policy** screen.
2. In the **Search Results** section, click the link in the **Policy Information** column corresponding to the policy *w*hose details you want to view.
   The **Policy** screen appears.
3. Click the **Log** tab.
   The **Log** tab appears.
4. View the complete trail of actions performed on the policy in the **Policy Log** zone.

Related Topics

For more information on...	See...
How to search for a policy	Searching for a Policy on page 239
Policy screen	Policy (Used for Viewing) on page 247
Policy Log zone	Policy Log on page 257
How to add a log entry for a policy	Adding a Log Entry for a Policy on page 278

Adding a Log Entry for a Policy

Procedure

To add a log entry for a policy:

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1. Search for the policy in the **Policy** screen.
2. In the **Search Results** section, click the link in the **Policy Information** column corresponding to the policy for *w*hich you want to add a log entry.
   The **Policy** screen appears.
3. Click the **Log** tab.
   The **Log** tab appears.
4. Click the **Add Log Entry** link in the upper right corner of the **Policy Log** zone.

   The **Add Policy Log** window appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Policy Information	Displays information about the policy.	Not applicable
Log Details	Used to specify additional comments for the policy.	Yes

5. Enter the comments in the **Log Details** field.
6. Click **Save**.
   The log entry is added in the **Policy Log** zone.

Related Topics

For more information on...	See...
How to search for a policy	Searching for a Policy on page 239
Policy screen	Policy (Used for Viewing) on page 247
Policy Log zone	Policy Log on page 257

Chapter 7

Individual Health Insurance

Topics:

- Pre-requisites
- Support Open Ended Health Plans, Pricing Rules, and Individual Memberships
- Individual Membership
- Individual Membership Termination
- Individual Membership Renewal
- Automatic Contract Creation for Individual Membership
- Rate Guarantee for Individual Membership
- Late Setup Notification
- Young Adult Coverage in an Individual Membership
- Individual Membership Preference
- Binder Payment for Individual Membership
- Membership Status Reason Preference
- To Do Creation for Manual Refund/Write Off on Individual Membership Cancellation

Individual health insurance is a coverage that an individual purchase on its own, on an individual or family basis, as opposed to obtaining through an employer. An individual can buy a generic, Medicare, Medicaid, or CHIP health insurance plan from a health insurance payer or from an insurance exchange.

A health insurance payer and insurance exchange sells different plans from the health products to an individual. A health product is a discrete package of health insurance coverage benefits that are offered using a particular product network type (such as health maintenance organization, preferred provider organization, exclusive provider organization, point of service, or indemnity) within a service area.

A health product can include multiple health benefit plans which may cover medical expenses, hospitalization, doctor and hospital visits, prescription drugs, wellness care, etc. A health benefit plan can be a primary or add-on plan. A primary health benefit plan is a standalone plan, which is sold directly. For example, Medical Insurance is a primary health insurance plan.

An add-on plan is also known as supplemental plan. An add-on plan can be an ancillary or rider plan. An add-on plan is not a standalone plan and hence it is not sold directly. For example, the Dental, Vision, Accidental Death, Disability, Critical Illness, Long-Term Care, and Life Insurance plans can be sold as add-on health insurance plans.

Oracle Revenue Management and Billing enables you to create and edit the following entities for a fully-insured individual business:

- Health Products
- Health Plans
- Individual Memberships
- Member Persons
- Medicare or Other Benefits
- Accounts
- Contracts
- Price Items (offered as services)
- Pricing Rule Types
- Pricing Rules
- Price Assignments
- Billable Charges

Two new business objects named **C1-HealthcareProduct** and **C1-HealthPlan** are introduced in this release. The **C1-HealthcareProduct** business object enables you to create a health product. You can define and edit a health product through a health product and plan inbound message. While defining a health product, you need to specify the following details - product type, product sub type, product category, product LOB, product LOB category, start date, end

date, status, etc. A health product can be a bundled or non-bundled product. A bundled product means it includes one or more health products. You can define characteristics for a health product. A health product should be associated with a division (i.e. service area). You can associate a health product to one or more divisions and one division can have one or more health products.

The **C1-HealthPlan** business object enables you to create a health plan for a health product. You can define and edit a health plan through a health product and plan inbound message. While defining a health plan, you need to specify the following details - health product, start date, end date, status, etc. In addition, you need to indicate whether the health plan is a charitable plan, standard plan, grandfather plan, qualified from exchange, ancillary plan, rider plan, add-on plan, etc. You can define characteristics for a health plan.

A health product can have one or more health plans. On inactivating a health product, the system will not automatically inactivate the respective health plans. An individual can subscribe for one or more health plans. The system creates an individual membership for each subscribed health plan. An individual membership can have one or more member persons. One member person in an individual membership must be the main subscriber. You can add one or more dependent persons in the individual membership. One member person in an individual membership should be financially responsible for the individual membership. For more information, see the Individual Membership on page 384 section.

If an individual subscribe for an add-on health plan along with a primary health plan, the system enables you to indirectly link a primary health plan with an add-on health plan by associating the primary individual membership with the add-on individual membership. At present, you can associate only one add-on individual membership with the primary individual membership. The system creates the billable charges for both primary and add-on individual memberships independently.

On terminating the primary individual membership, the system provides a facility to automatically terminate the individual membership on the add-on health plan. For more information, see the Individual Membership Termination on page 399 section. However, on canceling, reinstating, or renewing a primary individual membership, the system does not automatically cancel, reinstate, or renew the individual membership on the add-on health plan. To cancel, reinstate, or renew an individual membership on the add-on health plan, the system must receive the required information for the individual membership from the enrollment system.

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Pre-requisites

Information will be available soon!

Support Open Ended Health Plans, Pricing Rules, and Individual Memberships

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

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

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

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

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

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

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

Individual Membership

Oracle Revenue Management and Billing enables you to create and edit individual memberships from the user interface and through a health care inbound message or membership repricing inbound web service. Note that the user interface for adding and editing individual memberships is not yet well-designed and should only be used by the presales and sales teams for learning and demo purposes and not by the customers.

A new business object for individual membership named **C1-IndMembership** is introduced in this release. While creating an individual membership through a health care inbound message, you need to specify the following details:

- **Health Plan** - Used to indicate the health plan for which the main subscriber has enrolled.
- **Member Person Status** - Used to indicate the main subscriber or dependent person's status.
- **Status Reason** - Used to indicate the reason why you want to change the status of the main subscriber or dependent person.
- **Auto Renew** - Used to indicate whether the individual membership should be automatically renewed.
- **Contract Period** - Used to indicate the period (in months) for which the individual membership should be automatically renewed.
- **Membership Renewal Date** - Used to indicate the date when the individual membership should be renewed. It is required for manual renewal of the individual membership. In case of automatic renewal, the membership renewal date is calculated by the system.
- **Associated Membership Details** - Used to associate the individual membership with another individual membership which is created for the add-on health insurance plan.
- **Member Identifiers** - Used to specify one or more identifiers for the individual membership.
- **Exchange Details** - Used to indicate whether the individual membership is purchased from the exchange. If the individual membership is purchased from the exchange, you need to specify the exchange ID.
- **Binder Payment Details** - Used to indicate whether the binder payment is required for the individual membership. If so, you need to specify the following details:
  - Grace Days
  - Binder Liability Amount (if required)
  - Threshold Percentage (if required)
  - Hold Billing

  For more information about the binder payments, see the Binder Payment for Individual Membership on page 411 section.

Note: On creating an individual membership for a health plan, the membership category is set to **INDV**. However, on creating a group membership for a policy plan, the membership category is set to **GRUP**.

The following table lists the statuses introduced in the lifecycle of the **C1-IndMembership** business object:

Individual Membership Status	**Description**
Draft	An individual membership is created in the **Draft** status and then transitioned to either the **Pending Effectuation** or **Active** status as mentioned in the health care inbound message or membership repricing incoming message.
Pending Effectuation	If the main subscriber status is set to **Pending Effectuation**, the system sets the status of the individual membership to **Pending Effectuation**. The system determines the individual membership status reason using the membership status

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Individual Membership Status	**Description**
	reason preference which is specified in the **Status Reason Mapping** option type of the **C1-ASOBLLNG** feature configuration. The system monitors whether the binder payments (if required) are received for the individual membership in the **Pending Effectuation** status. If the binder payments are received, the status of the individual membership is not automatically transitioned to **Active**. The status of the individual membership is changed from **Pending Effectuation** to **Active** only when the main subscriber status update information is received through a health care inbound message or membership repricing inbound web service.
Active	If the main subscriber status is set to **Active**, the system sets the status of the individual membership to **Active**. The system determines the individual membership status reason using the membership status reason preference which is specified in the **Status Reason Mapping** option type of the **C1-ASOBLLNG** feature configuration. If the binder payments are not required for the individual membership, you can directly set the status of main subscriber to **Active**. In addition, if you want to reinstate the individual membership, you must set the status of main subscriber to **Active**. The system will then change the status of the individual membership from **Terminated** to **Active**. In case of reinstatement of the individual membership, the status of the dependent persons is not changed automatically from **Inactive** to **Active** unless the dependent person status update information is received through a health care inbound message or membership repricing inbound web service.
Terminated	If the main subscriber status is set to **Inactive**, the system sets the status of the individual membership to **Terminated**. The system determines the individual membership status reason using the membership status reason preference which is specified in the **Status Reason Mapping** option type of the **C1-ASOBLLNG** feature configuration. Once the status of the individual membership is set to **Terminated**, the system automatically changes the status of the dependent persons to **Inactive**. Note that while inactivating the dependent persons, the system only considers the dependent persons who are in the **Active** status. The system determines the dependent person status reason using the membership status reason preference. The system also updates the end date of the individual membership, main subscriber, and dependent persons. For more information, see the Individual Membership Termination on page 399 section.
Canceled	If the main subscriber status is set to **Canceled**, the system sets the status of the individual membership to **Canceled**. The system determines the individual membership status reason using the membership status reason preference which is specified in the **Status Reason Mapping** option type of the **C1-ASOBLLNG** feature configuration. Once the status of the individual membership is set to **Canceled**, the system automatically changes the status of the dependent persons to **Canceled**. The system determines the dependent person status reason using the membership status reason preference. The system will also cancel the billable charges and bill segment (if any) created for the individual membership or financially responsible member person account.

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The system also enables you to change the status of a dependent person in the individual membership through a health care inbound message or membership repricing inbound web service. On changing the status of a member person to **Pending Effectuated** or **Active**, the system considers the member person during premium calculation.

On changing the status of the individual membership and member person, the system creates an audit event to trigger the repricing feature. The **C1-IndMembership** business object is configured for the entity audit framework. However, the repricing is triggered only when an active audit event type for the **C1-IndMembership** business object is created in the system.

The system creates appropriate log entries during the individual membership and member person status transition. You can view the status transition logs of individual membership in the **Log** tab of the **Membership (Used for Viewing)** screen. A new zone named **Member Person Log** is introduced in the **Main** tab of the **Membership (Used for Viewing)** screen. It enables you to view the log entries generated on the member person status transition.

You can define individual membership status reasons through the **Status Reason** screen. A new lookup field named **MEMB_PERS_STAT_RSN_FLG** is introduced in this release. Here, you can add the status reasons for the member person.

Types of Individual Membership

Oracle Revenue Management and Billing enables you to create different types of individual membership:

- Medicare Membership on page 217
- Retiree Membership on page 221

Medicare Membership

Oracle Revenue Management and Billing enables you to maintain an employer sponsored group medicare membership (800 series plans) for a fully-insured large group customer and create age based or tier based premium charges for the Medicare Part A, Part B, and Part D. A Medicare beneficiary may qualify for a low income subsidy (LIS) for Medicare Part D or may incur late enrollment penalty (LEP) for Medicare Part D. In such case, the system enables you to consider the low income subsidy (LIS) and late enrollment penalty (LEP) while calculating the Medicare Part D premium.

The system enables you to create and edit a Medicare membership from the user interface, through a health care inbound message, or through the membership repricing inbound web service. While creating a Medicare membership, you must set the membership type to **Medicare**. Ideally, you must define a Medicare membership on a Medicare Affiliated policy plan. However, at present, the system does not validate whether a Medicare membership is defined only on a Medicare Affiliated policy plan and not on a Commercial policy plan.

You can create a Medicare membership when you specify the main subscriber of the membership. A Medicare membership should have only one member person who is covered for Medicare and who is financially responsible for the membership. Ideally, the main subscriber should exists as a person in the system before creating the Medicare membership from the user interface, through a health care inbound message, or through the membership repricing inbound web service. The system enables you to create the main subscriber and Medicare membership through the same health care inbound message or through the same membership repricing request. In such case, the system will first create the person record for the main subscriber and then create the Medicare membership.

On creating a Medicare membership, the status of the membership and main subscriber is set to **Active**. You can inactivate a Medicare membership from the user interface, through a health care inbound message, or through the membership repricing inbound web service. There are two ways in which you can inactivate the membership from the user interface:

- On clicking the **Inactivate** button
- On inactivating the main subscriber of the membership

However, through a health care inbound message or through the membership repricing inbound web service, you can inactivate the membership only by inactivating the main subscriber of the membership. On inactivating a Medicare membership, the system does the following:

- Set the status of the membership and main subscriber to **Inactive**

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- Cancels the billable charges which are created for the membership
- Cancels the corresponding bill segments (if any)

If an audit event exists for the membership which is inactivated, the **BO_STATUS_CD** column corresponding to the record in the **C1_AUDIT_EVENT**, **C1_AUDIT_EVENT_LOG**, and **CI_PRCE_CALC** tables is set to **INVALID**. If a repricing entity detail record exists for the membership in the **PENDING** or **ERROR** status, then the **BO_STATUS_CD** column corresponding to the record in the **CI_REPRC_ENTITY_DTL** table is set to **COMPLETE**. If a repricing request exists for the membership in the **PENDING** or **ERROR** status, then the **BO_STATUS_CD** column corresponding to the record in the **CI_REPRC_REQ_DTL** table is set to **COMPLETE**.

On terminating a fully-insured group policy, the status of all Medicare memberships on the respective policy plans is set to **Terminated**. Similarly, on reinstating a fully-insured group policy, the status of all Medicare memberships on the respective policy plans is set to **Active**.

The system enables you to maintain the Membership benefits (such as, Part A, Part B, Part D, Part D LIS, and Part D LEP) of a member person through the **Benefit** screen. The system enables you to define and edit the Membership benefits from the user interface, through a health care inbound message, or through the membership repricing inbound web service. While defining a Membership benefit of a member person for Part A, Part B, and Part D, you need to specify a Medicare plan benefit package (i.e. 800 series plan) which is applicable for the Membership benefit. The system enables you to define and edit a Medicare plan benefit package through the **Field Mapping** screen. You can use the Medicare plan benefit package as a pricing parameter in the age based or tier based pricing rules using which the Medicare premium is calculated. While defining a Membership benefit of a member person for Part D LIS and Part D LEP, you need to specify the benefit amount (i.e. subsidy or penalty amount).

While editing a Membership benefit of a member person from the user interface, you can only edit the characteristics of the Membership benefit. However, while editing a Membership benefit of a member person through a health care inbound message or through the membership repricing inbound web service, you can edit the end date, benefit amount, and characteristics of the Membership benefit. On editing a Membership benefit, the system inactivates the old record and creates a new record in the system. The status of the old benefit record is set to **Inactive** and the status of the new benefit record is set to **Active**.

The system enables you to discard an active or inactive Membership benefit from the user interface by clicking the **Discard** button. You can also discard an active or inactive Membership benefit through a health care inbound message or through the membership repricing inbound web service by changing its status to **Discarded**.

The system requires the following information to create charges for a Medicare membership:

- Whom to bill the Medicare membership (i.e. billing arrangement details)
- Age based or tier based pricing rules using which the premium should be calculated for the Medicare Part A, Part B, and Part D.
- Respective age based, tier based, and benefit pricing rule types associated with the respective policy plan

The system supports the following billing arrangements for a Medicare membership:

- **Group Billing** - Here, a Membership benefit is billed to a bill group which is derived for the Medicare membership.
- **Direct Billing** - Here, a Membership benefit is billed to a member person who is financially responsible for the Medicare membership.

You can indicate the billing arrangement for the Medicare memberships by defining a characteristic on the policy plan, policy, or parent customer. The system searches for the characteristic which is specified in the **Benefit Billing Arrangement** option type of the **C1-ASOBLLNG** feature configuration on the following entities in the specified sequence:

1. Policy Plan
2. Policy
3. Parent Customer

Note: If the benefit billing arrangement characteristic is not defined for any of the above listed entities, the system, by default, charges the Medicare membership premium to the bill group.

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The system requires the bill group and its account to bill the Medicare memberships when the benefit billing arrangement is set to **Group Billing**. You can create a bill group and its account from the user interface or through a health care inbound message. On creating an account for a bill group, the system automatically creates a contract on the account using distinct contract types for all policy plans of the parent customer and bill group policies. While creating a contract, the system considers all price items in all pricing rule types (including the related pricing rule types) which are associated with the policy plans of the parent customer and bill group policies.

The system requires the member person's account to bill the Medicare membership when the benefit billing arrangement is set to **Direct Billing**. You can create an account for a member person who is financially responsible for the Medicare membership through a health care inbound message. On creating an account for a member person, the system automatically creates a contract on the account using distinct contract types for the respective policy plan. While creating a contract, the system considers all price items in all pricing rule types (including the related pricing rule types) which are associated with the respective policy plan.

Retiree Membership

An employer may offer a retirement health plan coverage to its retired employees through a fully-insured group policy or an individual can independently opt for a government sponsored retirement health plan coverage. Oracle Revenue Management and Billing enables you to maintain a retiree membership for both the fully-insured group and individual business. The system enables you to maintain a flat or percentage based contribution of employer or sponsor for a retiree membership.

The system enables you to create and edit a retiree membership through a health care inbound message or through membership repricing inbound web service. While creating a retiree membership, the membership type must be set to **Retiree**. The system requires the following information to create charges for a retiree membership:

- Whom to bill the premium for the retiree membership (i.e. retiree billing arrangement details)
- Whom to bill the employer or sponsor contribution (i.e. sponsor billing arrangement details)
- Age based or tier based pricing rule using which the premium should be calculated for the retiree membership
- Discount charge pricing rule using which the employer or sponsor contribution should be calculated for the retiree membership

In case of the fully-insured individual business, the premium for a retiree membership is billed to the member who is financially responsible for the retiree membership. However, in case of the fully-insured group business, the system supports the following billing arrangements for the retiree membership:

- **Group Billing** - Here, the premium is billed to a bill group which is derived for the retiree membership.
- **TPA Billing** - Here, the premium is billed to the third party administrator (i.e. TPA person).
- **Direct Billing** - Here, the premium is billed to the member who is financially responsible for the retiree membership.

You can indicate the billing arrangement for a retiree membership in the fully-insured group business by defining a characteristic on the policy plan, policy, or parent customer. The system searches for the characteristic which is specified in the **Retiree Billing Arrangement** option type of the **C1-ASOBLLNG** feature configuration on the following entities in the specified sequence:

1. Policy Plan
2. Policy
3. Parent Customer

The system enables you to maintain a flat or percentage based contribution of employer or sponsor through a discount charge pricing rule. A field named **Sponsored** is available in the **Price Items** section while defining or editing a discount charge pricing rule type. If the **Sponsored** option is selected for a price item, the system creates and bills the charge for the price item as per the sponsor billing arrangement. The system searches for the characteristic which is specified in the **Sponsors Billing Arrangement** option type of the **C1-ASOBLLNG** feature configuration on the following entities in the specified sequence:

1. Policy Plan
2. Policy
3. Parent Customer

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In the fully-insured group and individual business, the system supports the following sponsor billing arrangements for the retiree membership:

- **Group Billing** - Here, the system creates a negative charge for the employer or sponsor contribution against the beneficiary account and a positive charge for the employer or sponsor contribution against the sponsor account.
- **TPA Billing** - Here, the system creates a negative charge for the employer or sponsor contribution against the beneficiary account and a positive charge for the employer or sponsor contribution against the sponsor account.
- **Direct Billing** - Here, the system creates a memo only charge for the employer or sponsor contribution against the beneficiary account. A bill message code is derived from the **Retiree Bill Message Code** option type of the **C1-ASOBLLNG** feature configuration and stamped against the beneficiary account.

In case of the group and TPA billing, the system derives the characteristic types which are specified in the **Sponsor Account Identifier Type Char Type** and **Sponsor Account Identifier Value Char Type** option types of the **C1-ASOBLLNG** feature configuration. The system then checks whether these characteristics are defined on any of the following entity in the specified sequence:

1. Policy Plan
2. Policy
3. Parent Customer

If these characteristics are defined on any of the above entity, the system derives the sponsor account for the bill group. The system then bills the employer or sponsor contribution charges to the sponsor account.

However, if the **Sponsored** option is not selected for a price item in a discount charge pricing rule type, the system creates and bills the charge for the price item as per the retiree billing arrangement.

Individual Membership Status Transition

The following figure graphically indicates how an individual membership goes through various statuses in its lifecycle:

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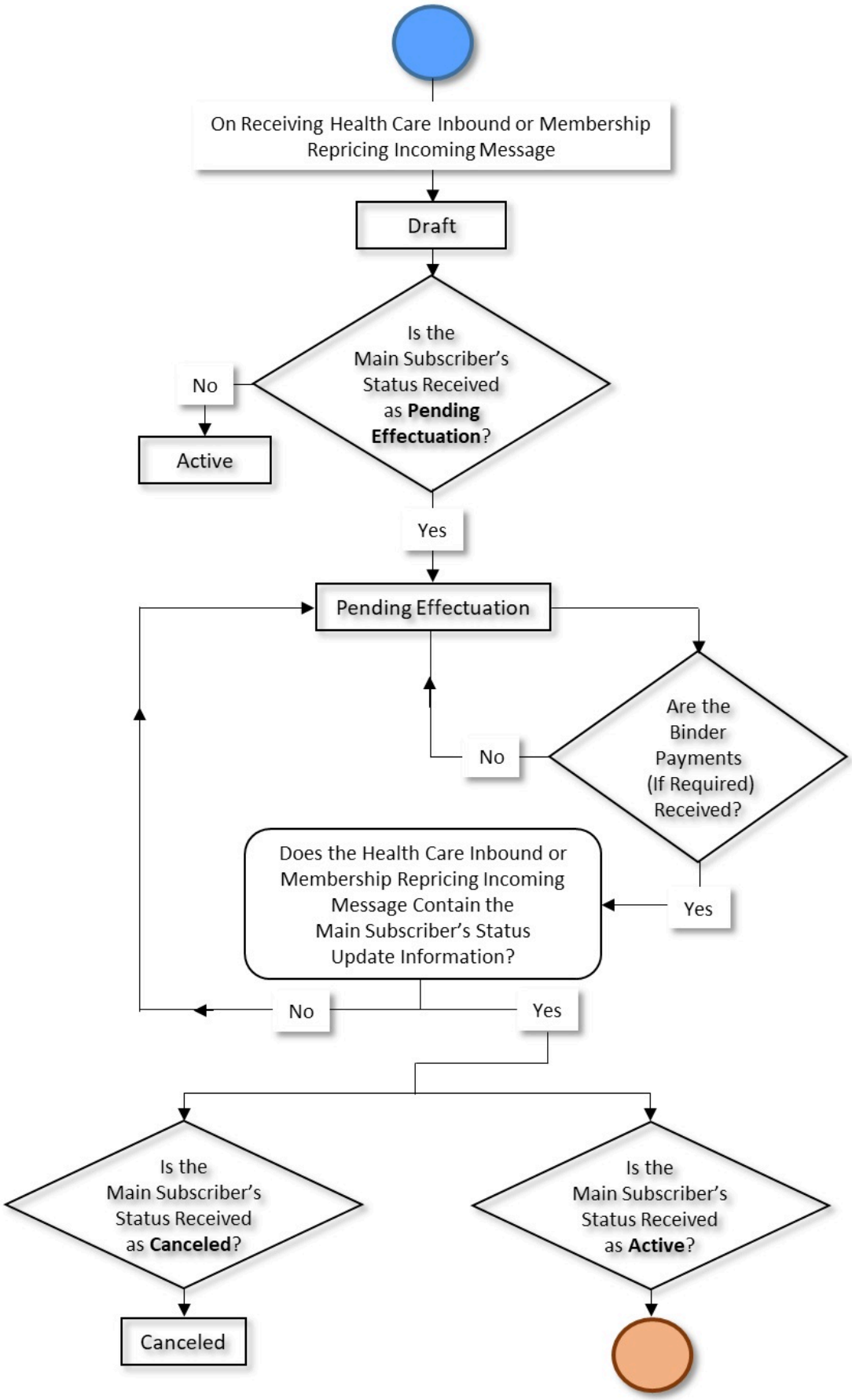

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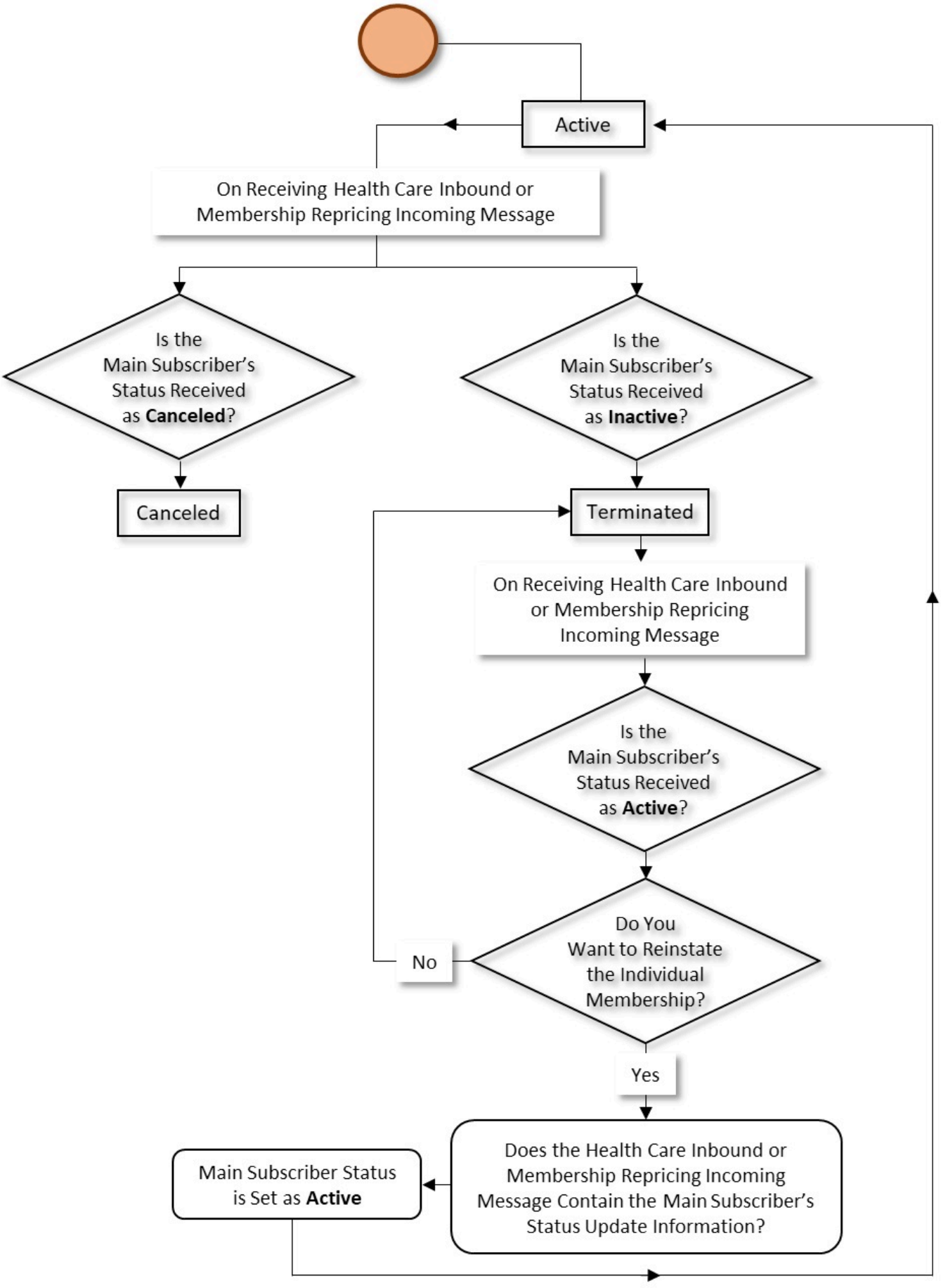

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Algorithms Used in C1-IndMembership

The following table lists the algorithms which are attached to the **C1-IndMembership** business object:

System Event	Algorithm	Algorithm Type	Description
Audit	C1-FIAUDEV	C1-FIAUDEV	Refer to C1-FIAUDEV on page 96
Audit	C1-MEMRLAUD	C1-MEMRLAUD	Refer to C1-MEMRLAUD on page 394
Audit	C1-DTCAGEIM	C1-DTCAGEIM	Refer to C1-DTCAGEIM on page 394
Audit	C1-MPCONCREA	C1-MPCONCREA	Refer to C1-MPCONCREA on page 233
Post Processing	C1-THRSHDAMT	C1-THRSHDAMT	Refer to C1-THRSHDAMT on page 422
Post Processing	C1-RTAREAMEM	C1-RTAREAMEM	Refer to C1-RTAREAMEM on page 231
Post Processing	C1-MEMSTSUP	C1-MEMSTSUP	Refer to C1-MEMSTSUP on page 396
Post Processing	C1-LATESET	C1-LATESET	Refer to C1-LATESET on page 397
Post Processing	C1-MEMRTGRNT	C1-MEMRTGRNT	Refer to C1-MEMRTGRNT on page 397
Validation	C1-VALMEMBO	C1-VALMEMBO	Refer to C1-VALMEMBO on page 233

The following table lists the algorithms which are used in the lifecycle of the **C1-IndMembership** business object:

Status	System Event	Algorithm	Algorithm Type	Description
Active	Enter	C1-BNDRH	C1-BNDRH	Refer to C1-BNDRH on page 397
		C1-IMRI-INS	C1-IMRI-INS	Refer to C1-IMRI-INS on page 398
		C1-INVRQIMEN	C1-INVRQIMEN	Refer to C1-INVRQIMEN on page 398
		C1-INDACCT	C1-INDACCT	Refer to C1-INDACCT on page 398
Terminated	Enter	C1-IMTR-INS	C1-IMTR-INS	Refer to C1-IMTR-INS on page 399
		C1-INVRQIMTM	C1-INVRQIMTM	Refer to C1-INVRQIMTM on page 399

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Status	System Event	Algorithm	Algorithm Type	Description
Canceled	Enter	C1-MEMINACT	C1-MEMINACT	Refer to C1-MEMINACT on page 234
		C1-INVRQIMCN	C1-INVRQIMCN	Refer to C1-INVRQIMCN on page 399

C1-FIAUDEV

If this algorithm is attached to the **Audit** system event of the **Group Membership** (**C1-Membership**), **Individual Membership** (**C1-IndMembership**), **Benefit** (**C1-Benefits**), and **Person** (**C1_PERSON_BO**) business objects, it is invoked whenever you define, edit, or delete the respective entity. It checks whether an active audit event type exists for the entity business object. If so, it considers the active audit event type and creates the audit event using the respective audit event type. The system creates the audit event whenever a group membership is added to a policy plan, an individual membership is added to a health plan, member person is added to a group or individual membership, and a membership benefit is added for a group or individual membership. It also creates the audit event whenever the group or individual membership, member person, and membership benefit details are updated. However, note that the audit events are created in the update scenario when the element listed for auditing in the age-based, tier-based, or benefit pricing rule type is updated. The system considers only those pricing rule types whose pricing rules are effective during the respective entity (i.e. group or individual membership, member person, or membership benefit whichever is updated) date range.

It creates one or more audit events in the **Pending** status. The entity type and entity ID for which an audit event is created are added corresponding to the audit event in the **C1_AUDIT_EVENT** table. In addition, the effective date is stamped corresponding to the audit event in the **C1_AUDIT_EVENT** table.

Note:

The system creates an audit event whenever the group or individual membership start and end dates and member person's start and end dates are changed in the system irrespective of whether these fields are listed for auditing or not in the age-based or tier-based pricing rule types.

Before creating an audit event, the system checks whether an audit event for the entity ID with the same effective date already exists in the **Pending** or **Error** status for the respective action. If so, the system does not create a new audit event for the entity. Instead, the system adds a new log entry in the existing audit event.

For each audit event, this algorithm derives the group or individual memberships on the policy or health plan, respectively, which is impacted and the pricing rule types whose pricing rules are defined on the respective policy or health plan. A repricing entity detail record is then created for each membership, pricing rule type, and effective date combination in the **CI_REPRC_ENTITY_DTL** table. The status of the repricing entity detail record is set to **Pending**. Once the repricing entity detail records are created successfully, the status of the audit event is changed to **Complete**.

It contains the following parameters:

- **Audit Event Business Object** - Used to specify the business object using which you want to create the audit event.
- **Audit Event Pending Status** - Used to specify the status in which you want to create the audit event. This parameter is also used for determining whether an audit event for the entity ID already exists in the system.
- **Audit Event Error Status** - Used to specify the status in which an audit event is transitioned when an error occurs while processing the audit event. This parameter is used for determining whether an audit event for the entity ID already exists in the system.

All the above parameters are mandatory.

Related Topics

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For more information on...	See...
How the audit events are created and processed for an age based or tier based pricing rule	Age Based and Tier Based Pricing Rules Audit Process on page 3467
How the audit events are created and processed for a membership	Membership Audit Process on page 3468
How the audit events are created and processed for a person	Person Audit Process on page 3472
How the audit events are created and processed for a membership benefit	Membership Benefit Audit Process on page 3474

C1-MEMRLAUD

This algorithm defines an eligible member role for each and every member person involved in the membership. It derives the **Member Role Structure** attribute defined in the policy plan in a group membership or from the health plan in an individual membership. This attribute is used to identify the member person details that are to be stamped based on the member person relationship. A member person relationship is derived from the member person depending on whether the member person is:

- Self
- Spouse
- Children
- Dependents

This algorithm derives the member person relationship through the **Member Person Relationship** table, as a common reference. Once the member person relationship is derived, in case of a group membership, the algorithm derives the characteristics, which are mapped on the policy plan, for member role mapping purposes. Whereas in case of an individual membership, the algorithm derives the characteristics, which are defined in the business rules, for member role mapping purposes.

C1-DTCAGEIM

This algorithm would be used for the calculation of a date that is further used for age-based calculations of the members in the fully-insured Individual Membership when the specific conditions are present.

- This algorithm is plugged-in in the system event Audit present in the Algorithms Tab of the BO Individual Membership
- It gets invoked whenever there is an update in the Individual Membership entity to perform date calculation and store the calculated date in the BO_DATA_AREA of this individual membership.

The essential pre-requisite for this algorithm to work as intended is as follows:

- If an individual has continuous coverage on different Medical Health Plans with the same first 5-digit of HIOS (legal entity) within the same plan year window, then age at the time of enrolment into the first plan is used throughout the plan year.
- The business rule category - 'Fully-Insured Pricing Rules' for this individual membership will have the criteria:

```
AGE CALCULATION DATE = Member Enrollment Date
and
AGE RECALCULATION DATE = Membership Renewal Date
```

When the above conditions are configured in the system, the algorithm works as follows:

- It lists out the enrollment start date of all memberships having the same main subscriber person and same account for the identified plan year window.

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- It then determines the oldest date among the enrollment start date such that there is continuous coverage between the consecutive memberships.
- The calculated date is then stored in the BO_DATA_AREA column in the Membership table in the format:

```
<calculatedDateMemberAgeContCoverage>YYYY-MM-DD</
calculatedDateMemberAgeContCoverage>
```

The corresponding algorithms responsible for member age calculation, that are present in the pricing rule type of the health plan for this membership entity, will fetch the value of the calculated date available in the BO_DATA_AREA column and determine the age for the member-person in the membership.

Parameter:

- **Healthcare Coverage Class** - This parameter is mandatory where the value indicates the valid value for Medical present in lookup Product Healthcare Category.
- **Plan Year Start Month** - This parameter is mandatory where the numeric value represents the month in a calendar year. For example, 1-Jan, 3-March, 6-June, etc.

C1-MPCONCREA

This algorithm is invoked when the following conditions are met:

- A member person who is financially responsible for the membership is added to the membership
- One or more accounts already exist for the member person in the system

If the above conditions are met, this algorithm derives the membership in which the member person is added. It then derives the policy plan to which the membership belongs. It creates contracts for each account of the member person in either of the following ways:

- If a price item is associated with the policy plan, it creates a contract using the contract type which is associated with the price item.
- If a pricing rule type is associated with the policy plan and the pricing rule type contains one or more price items, it creates a contract using a distinct contract type which is associated with each price item.

  Let us assume that PRT1 is associated with the policy plan and it contains three price items - PI1, PI2, and PI3. Now, if the PI1 is associated with the CT1 contract type, PI2 is associated with the CT2 contract type, and PI3 is associated with the CT3 contract type, this algorithm will create three contracts - C1 using CT1, C2 using CT2, and C3 using CT3. However, if the PI1 and PI3 are associated with the CT1 contract type and PI2 is associated with the CT2 contract type, this algorithm will create two distinct contracts - C1 using CT1 and C2 using CT2.

  If multiple pricing rule types are associated with the policy plan and each pricing rule type contains multiple price items, it creates a contract using a distinct contract type which is associated with each price item on each pricing rule type.

The status of each contract is set to **Active**. The contract start date is set to the start date of the respective plan. The default rate schedule specified on the respective contract type is added to the contract in the rate information and its effective date is set to the contract start date.

Note:

The system creates a contract using a contract type for an account when the division to which the account and contract type belongs is same.

If a contract of a contract type is already present on the account, the system will not create a new contract. Instead, it will update the start date of the existing contract, if required.

C1-THRSHDAMT

This algorithm works when the individual Membership Status is Pending Effectuation and status reason is Awaiting Binder Payment (configurable on field mapping).

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- If Binder Applicability is not available at the membership level, it invokes Business Rule service to fetch Binder Payment Business Rule.
- If Binder Payment Business Rule is not available, then it updates membership status reason as per configured value and creates a TO DO.
- If the Binder Applicability switch is 'Y', it calculates the binder payment threshold amount based on the binder liability amount and the binder payment threshold percentage.
- It also holds / releases the billable charges based on the 'Hold billing' configuration.

C1-RTAREAMEM

This algorithm derives the geographic rating area for a membership using the **Address Source** and **Address Type** characteristic types. It supports two address sources named **Policy Holder** and **Main Subscriber** and three address types named **Person Mailing**, **Person Seasonal**, and **Account Override**.

On adding a membership to a policy plan, this algorithm derives the characteristic types from the **Address Source Characteristic Type** and **Address Type Characteristic Type** attributes of a geographic rating area preference. This algorithm considers the geographic rating area preference which is specified in the **Rating Area Field Mapping for Group** option type of the **C1-ASOBLLNG** feature configuration. Then, it searches for these characteristics on the following entities in the specified sequence:

1. Policy Plan
2. State where the Policy Plan is Issued
3. Policy
4. State where the Policy is Issued

If these characteristics are not defined for any of the above listed entities, this algorithm derives the default address source and address type from the geographic rating area preference. If the address source is set to **Policy Holder**, this algorithm fetches the value from the **Parent Customer Policy Person Role** option type of the **C1-ASOBLLNG** feature configuration. It then derives the person who is associated with the policy using the parent customer policy person role. Once the address source and address type are derived, this algorithm fetches the state and zip code from the address type of the address source. For example, if the address source is set to **Policy Holder** and address type is set to **Person Mailing**, this algorithm fetches the state and zip code from the policy holder's mailing address. Once the state and zip code are fetched from the address, this algorithm checks whether the zip code is a 9-digit code. If not, it appends zeros to make it a 9-digit zip code. It then derives the value of the **Use Plan Details** attribute from the geographic rating area preference. If the attribute is set to**Y**, this algorithm derives a geographic rating area for the state, zip code, policy number, plan number, and source system combination. However, if the attribute is set to**N**, this algorithm derives a geographic rating area for the state and zip code combination. If the geographic rating area is not derived for the specified combination, this algorithm derives the default geographic rating area from the geographic rating area preference. Once the geographic rating area is derived, this algorithm stores the geographic rating area for the membership. The characteristic type specified in the **Geographic Rating Area Characteristic Type** attribute of the geographic rating area preference is used to store geographic rating area for the membership. The effective date of the characteristic is set to effective date of the address.

C1-MEMSTSUP

This Algorithm cascades the status, status-reason and end-date of the dependent member-person in the membership for any change in status of the main member person.

Logs are created for dependent member person status changes.

When Termination request is sent for a membership, Its associated membership (if it is in Active status) for add-on plan will also get terminated.

Soft Parameter:

- Valid values for Cascade Associate Membership should be Y or N.
- This flag will indicate whether to cascade the changes to associate membership.

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C1-LATESET

This algorithm is used to send Late Setup Notification when difference between member person start date and creation data is greater than or equal to 'Late Setup Threshold'.

Parameter:

- To Do Type: Notification will be created using this To Do Type
- To Do Role: If It's not blank then this To Do Role will be used in To Do Type Notification otherwise default will be used.

C1-MEMRTGRNT

This algorithm check rate guarantee details are receive at membership level, If not then it invoke Business Rule service by providing Business Rule Category as Rate Guarantee, Membership Id, and Effective date as Membership Start Date to derive rate guarantee from business rule if any rate guarantee business rule applicable.

If data is not available then it will add the Rate guarantee details into CI_ MEMBERSHIP_RATE_GRNT and C1_ENT_BUS_RULE table else it will update existing records.

C1-VALMEMBO

This algorithm validates a membership. It checks the following:

- Whether the membership end date is not earlier than the membership start date.
- Whether the membership start date is not earlier than the policy plan start date or later than policy plan end date.
- Whether the membership end date is not earlier than the policy plan start date or later than policy plan end date.
- Whether the policy plan for which you want to define the membership is specified.
- Whether the person who is the main subscriber is added to the membership.
- Whether the relationship type is specified while adding a person to the membership.

C1-BNDRH

This algorithm is invoked during the membership activation process. It checks whether the binder payment is received for the membership. If the binder payment is received, the membership status is changed from **Pending Effectuation** to **Active**.

Note: At present, this algorithm is invoked only during the membership enrollment and not for membership reinstatement, where the membership status is changed from **Terminated** to **Active**.

This algorithm is invoked using the following scenario:

If...	**Then...**
The membership is in the **Active** status and the binder payment attributes like the **Consider Binder Liability Amount Flag** is configured as **N** along with the **Membership Status Reason when Binder Payment Received** is configured as **Binder Payment Received** in the **Field Mapping** screen	The system checks whether the hold billing switch in the **CI_MEMBERSHIP** table contains any value. If any value exists, the system releases the billable charges which are kept on hold for the membership. In addition, the system performs the following operations: • Retrieves the account (of the financial responsible person) for the membership. • Retrieves the non-binder payment contracts for the accounts from the **CI_SA** table. • Retrieves the billable charges present on the non-binder payment contracts where the membership ID is stamped as a characteristic.

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If...	Then...
	• Checks whether the bill after date of each billable charge contains a future date. If the bill after date contains a future date then it is changed to the system date minus one.

C1-IMRI-INS

The algorithm will update instruction record for Refund/Write-off Instruction on individual membership reinstatement

C1-INVRQIMEN

This algorithm would be configured on full-insured Individual Membership enrolment process.

It is used to create Automatic Invoice Request on the account details (Account Identifier Type and Account Identifier Type Value) mentioned in the Individual Membership Characteristic section on its enrollment.

If the newly enrolled Individual Membership has the account details for the main subscriber and is financially responsible person of the Individual Membership as well as the Membership Characteristics section has the characteristic 'Eligible For Invoice Request Creation = Yes' , then it will create the invoice request for the specific account for new enrollment. Else, for the events of reinstatement of the individual membership, the system will validate that this membership Id already exists and check if the previous status of the Membership is 'Terminated' to process the invoice request creation on individual Membership reinstatement. Also, if the parameter 'Termination Reason' is provided along with the parameter 'Invoice Request Type for Individual Membership Reinstatement', then the algorithm will evaluate to create the invoice request based on the list of values against the membership status reason provided for previous status ='Terminated'.

Before creating any invoice request, it will check whether any invoice request exists in final status with the specified account and If yes, then it will create new invoice request for the eligible account. The details of the invoice request created and its associated validation is available in the log tab of the Membership screen.

Parameters:

- Invoice Request Type for Individual Membership New Enrollment - This is an mandatory parameter to fetch configurations related to invoice Request creation for event of Individual Membership New Enrollment.
- Invoice Request Type for Individual Membership Reinstatement - This is an optional parameter to fetch configurations related to invoice Request creation for event of Individual Membership Reinstatement
- Termination Reason - This is an optional parameter to determine whether invoice request needs to be created for event of Individual Membership Reinstatement and for the list of the status reasons mapped to the previous status event 'Terminated'. The size of the list is maximum 5 comma-separated values.

C1-INDACCT

This algorithm evaluates the individual membership to determine the account to associate it with. If the membership is already associated with an account, no further action is required. If the membership is not yet associated with an account, new account creation rules are assessed and if met, a new account is created for the main subscriber and linked to the membership. Otherwise, the account linked to the prior membership of the individual for the same health coverage class is used.

A new account is created for an individual's first enrollment to a health coverage class. If the individual subsequently changes plans within a health coverage class, a new account is created if there is a gap in coverage from the prior enrollment or one of the configurable health plan characteristic criteria is met, that is:

1. If a health plan char type is provided as a parameter and the old and new values are also provided, a new account is created if the health plan char value from the prior membership = old value and the health plan char value from the current membership = new value.
2. If a health plan char type is provided as a parameter and the old and new values are not provided, a new account is created if the health plan char value from the prior membership <> health plan char value from the current membership.

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C1-IMTR-INS

This algorithm is used to initiate the process of automatic refund/write-off creation on individual membership termination. It identifies the account linked to financial responsible person of the individual membership.

It contains the following parameter:

- **Wait Days** - Used to specify the days after which the account balance is retrieved.

> **Note:**
>
> If you do not specify the value, by default, it is set to zero (0).
>
> You must specify a numeric value greater than zero.

C1-INVRQIMTM

This algorithm would be configured on full-insured Individual Membership termination process. It is used to create Automatic Invoice Request on the account details (Account Identifier Type and Account Identifier Type Value) mentioned in the Individual Membership Characteristic section on its termination. If the terminated Individual Membership has the account details for the main subscriber and is financially responsible person of the Individual Membership, then it will create the invoice request for the specific account. Before creating any invoice request, it will check whether any invoice request exists in final status with the specified account and If yes, then it will create new invoice request for the eligible account. The details of the invoice request created and its associated validation is available in the log tab of the Membership screen.

C1-MEMINACT

This algorithm changes the status of the member person to the value specified in the **Membership Person Inactive Status** option type of the **C1-ASOBLLNG** feature configuration. It also does the following:

- Cancels the billable charges which are created for the membership
- Cancels the corresponding bill segments (if any)

If an audit event exists for the membership which is inactivated, the **BO_STATUS_CD** column corresponding to the record in the **C1_AUDIT_EVENT**, **C1_AUDIT_EVENT_LOG**, and **CI_PRCE_CALC** tables is set to **INVALID**. If a repricing entity detail record exists for the membership in the **PENDING** or **ERROR** status, then the **BO_STATUS_CD** column corresponding to the record in the **CI_REPRC_ENTITY_DTL** table is set to **COMPLETE**. If a repricing request exists for the membership in the **PENDING** or **ERROR** status, then the **BO_STATUS_CD** column corresponding to the record in the **CI_REPRC_REQ_DTL** table is set to **COMPLETE**.

C1-INVRQIMCN

This algorithm would be configured on full-insured Individual Membership cancelation process. It is used to create Automatic Invoice Request on the account details (Account Identifier Type and Account Identifier Type Value) mentioned in the Individual Membership Characteristic section on its cancelation. If the canceled Individual Membership has the account details for the main subscriber (and is financially responsible person) present in the Individual Membership Characteristics section, then it will create the invoice request for the specific account. Before creating any invoice request, it will check whether any invoice request exists in final status with the specified account and If yes, then it will create new invoice request for the eligible account. The details of the invoice request created and its associated validation is available in the log tab of the Membership screen.

Individual Membership Termination

To terminate an individual membership, you need to change the status of the main subscriber to **Inactive** through a health care inbound message or membership repricing inbound web service. Along with the main subscriber status, you need to specify the status reason and end date for the main subscriber. If the end date is earlier than or equal to the inbound

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processing date, the system updates the status, status reason, and end date of the main subscriber and then changes the status of the individual membership to **Terminated**. The system determines the individual membership status reason using the membership status reason preference which is specified in the **Status Reason Mapping** option type of the **C1-ASOBLLNG** feature configuration.

Once the status of the individual membership is set to **Terminated**, the system automatically changes the status of the dependent persons to **Inactive**. Note that while inactivating the dependent persons, the system only considers the dependent persons who are in the **Active** status. The system determines the dependent person status reason using the membership status reason preference.

If the main subscriber end date is later than the inbound processing date, the system creates a record in the **CI_MEMBERSHIP_PROCESS** table with the **Pending** status. The system stores the following information in the record:

- Membership ID
- Member Person ID
- Whether the member person is a main subscriber
- Processing date (it is set to future dated end date of the member person)
- Required action (is set to **Terminate**)

A new batch named **C1-MEPRC** is introduced in this release. On the **C1-MEPRC** batch execution, the system checks whether there are any records in the **CI_MEMBERSHIP_PROCESS** table with the **Pending** status. If so, the system checks whether the processing date of the record is earlier than or equal to the system date. If so, the system determines the required action to be taken for the individual membership from the record. If the **MEMB_PROCESS_FLG** column of the record is set to **Terminate** and the **MAIN_CUST_SW** column is set to **N**, the system changes the status of the dependent person to Inactive and updates the end date of the dependent person.

However, if the **MEMB_PROCESS_FLG** column of the record is set to **Terminate** and the **MAIN_CUST_SW** column is set to **Y**, the system updates the status and end date of the main subscriber and then changes the status of the individual membership to **Terminated**. Once the status of the individual membership is set to **Terminated**, the system automatically changes the status of the dependent persons to **Inactive**. The system also updates the end date of the individual membership and dependent persons.

The system enables you to configure whether the individual membership on the add-on health insurance plan should be automatically terminated when the primary individual membership is terminated. If the **Cascade Associate Membership** parameter in the **C1-MEMSTSUP** algorithm is set to **Y**, the system changes the status of the associated individual membership to **Terminated**. Once the status of the associated individual membership is set to **Terminated**, the system automatically changes the status of its main subscriber and dependent persons to **Inactive**. The system also updates the end date of the associated individual membership, its main subscriber and its dependent persons.

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

Individual Membership Renewal

Oracle Revenue Management and Billing enables you to renew an individual membership in the following two ways:

- Manually
- Automatically

While creating or editing an individual membership through a health care inbound message or membership repricing inbound web service, you must set the **Auto Renew** option for the individual membership to either **Y** or **N**.

If the **Auto Renew** option for an individual membership is set to **N**, you need to specify the following details in a health care inbound message or membership repricing incoming message:

- Membership renewal date

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- Status, status reason, and end date of the main subscriber
- Status, status reason, and end date of the dependent person

The enrollment system can send the renewal information either during the enrollment period or after the enrollment period. Irrespective of when the renewal information is received, the membership renewal date must be set to the membership end date + 1. For example, if the enrollment period is from 01-01-2021 to 12-31-2021, then the system must receive the membership renewal date as 01-01-2022. On renewing an individual membership, the dependent person in the individual membership is not automatically activated unless the activation information is received for the dependent person from the enrollment system. The associated membership for an add-on health insurance plan is not automatically renewed unless the renewal information is received for the respective membership from the enrollment system.

If the **Auto Renew** option for an individual membership is set to **Y**, you need to specify the contract period for which the individual membership should be automatically renewed. The system then creates a record in the **CI_MEMBERSHIP_PROCESS** table with the **Pending** status. The system stores the following information in the record:

- Membership ID
- Main Subscriber ID
- Whether the member person is a main subscriber
- Processing date (it is set to the membership end date)
- Required action (is set to **Renew**)

On the **C1-MEPRC** batch execution, the system checks whether there are any records in the **CI_MEMBERSHIP_PROCESS** table with the **Pending** status. If so, the system checks whether the processing date of the record is earlier than or equal to the system date. If so, the system determines the required action to be taken for the individual membership from the record. If the **MEMB_PROCESS_FLG** column of the record is set to **Renew** and the **MAIN_CUST_SW** column is set to **Y**, the system calculates the renewal date and new end date for the individual membership.

The renewal date for the individual membership is set to membership end date + 1. For example, if the enrollment period is from 01-01-2021 to 12-31-2021, the system sets the renewal date to 01-01-2022 (i.e. 12-31-2021 + 1). The new membership end date is calculated using the renewal date and contract period. For example, if the renewal date is 01-01-2022 and contract period is 12 months, the system sets the end date of membership, main subscriber, and dependent persons to 12-31-2022. The associated membership for an add-on health insurance plan is not automatically renewed during the individual membership renewal.

The automatic renewal request for an individual membership must be received during the enrollment period. If the automatic renewal request for an individual membership is received after the enrollment period, the system will not renew the individual membership automatically.

Once the membership end date is changed, the system will trigger the repricing feature and accordingly create or extend the billable charge for the renewed period.

Automatic Contract Creation for Individual Membership

Oracle Revenue Management and Billing automatically creates contracts for each account of the financially responsible member person when:

- Person is added to an individual membership
- Account is added for a financially responsible member person
- Health plan is added or edited in the system

In the former two scenarios, the system derives the individual membership where the person is financially responsible for the membership. Once the individual membership is derived, the system derives the health plan for which the individual membership is enrolled.

Once the health plan is derived, the system checks whether the pricing rule types are associated with the health plan. If a pricing rule type is associated with the health plan and the pricing rule type contains one or more price items, it creates a contract using a distinct contract type which is associated with each price item. Let us assume that PRT1 is

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associated with the health plan and it contains three price items - PI1, PI2, and PI3. Now, if the PI1 is associated with the CT1 contract type, PI2 is associated with the CT2 contract type, and PI3 is associated with the CT3 contract type, the system will create three contracts - C1 using CT1, C2 using CT2, and C3 using CT3. However, if the PI1 and PI3 are associated with the CT1 contract type and PI2 is associated with the CT2 contract type, the system will create two distinct contracts - C1 using CT1 and C2 using CT2.

If multiple pricing rule types are associated with the health plan and each pricing rule type contains multiple price items, it creates a contract using a distinct contract type which is associated with each price item of each pricing rule type.

The status of each contract is set to **Active**. The contract start date is set to the start date of the respective individual membership. If the same contract type is associated with the same or different price items on the same or different pricing rule types of different health plans, the contract start date is set to the start date of the earliest health plan. The default rate schedule specified on the respective contract type is added to the contract in the rate information and its effective date is set to the contract start date.

Note:

The system creates a contract using a contract type for an account only when the division to which the account and contract type belongs is same.

If a contract of a contract type is already present on the account, the system will not create a new contract. Instead, it will update the start date of the existing contract, if required.

Rate Guarantee for Individual Membership

At times, the insurance carriers provide rate guarantee health plans to a fully-insured individual wherein the insurance rate does not change for the rate guarantee period (i.e. lock-in period). Oracle Revenue Management and Billing enables you to configure guaranteed rate for one or more health insurance services offered to an individual person. Unless, there are some qualifying life events (QLE), the system will calculate the premium on the same rate for the next coverage period until the rate guarantee period is over.

The system enables you to maintain the rate guarantee details for each individual membership through a health care inbound message or through membership repricing inbound web service. It enables you to capture the following details:

- **Rate Guarantee Start Date** - Used to specify the date from when the rate guarantee is available for the individual membership.
- **Rate Guarantee End Date** - Used to specify the date till when the rate guarantee is available for the individual membership.
- **Rate Guarantee Status** - Used to indicate the status of the rate guarantee period. The valid values are - **Active** and **Inactive**.

You can send the rate guarantee details for an individual membership during enrollment (i.e. on membership creation), during coverage period, or during membership renewal. While sending the rate guarantee details of an individual membership, ensure that the active rate guarantee records do not have overlapping date range.

The system enables you to define the rate guarantee business rules. If the rate guarantee details are not specified for an individual membership during enrollment, the system derives the rate guarantee details for the individual membership through a rate guarantee business rule. The rate guarantee business rule indicates the following:

- **Rate Guarantee Applicability** - Used to indicate whether the rate guarantee is available for the individual membership.
- **Rate Guarantee Period** - Used to derive the rate guarantee start and end dates. The system sets the rate guarantee start date to the membership start date and the rate guarantee end date to the rate guarantee start date + rate guarantee period.

There might be situations wherein the rate guarantee details are received for an individual membership later during the coverage period or during membership renewal through a health care inbound message. In such scenarios, the system will then give precedence to the rate guarantee details which are received through a health care inbound message and

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will not derive the rate guarantee details from the rate guarantee business rule which is stamped against the individual membership.

A new column named **Rate Guarantee** is available in the **Price Items** section while defining or editing an age based or tier based pricing rule type. While creating a charge for an individual membership, the system checks whether the **Rate Guarantee** option is selected for the price item in the respective pricing rule type and whether the billable charge timeline falls within the rate guarantee period. If so, the system derives the rate guarantee pricing rule for the price items where the **Rate Guarantee** option is selected.

The system stores the pricing rule which is effective for such price items on the rate guarantee start date as the rate guarantee pricing rule. Until the rate guarantee period is over, the system considers the rate guarantee pricing rule for the individual membership during premium calculation. This ensures that the same rate is charged for a health insurance service even when the rate has increased for the health insurance service in the system.

The Entity Audit framework is configured for the Rate Guarantee feature. The system will create audit events when the rate guarantee records are added or updated for an individual membership.

Late Setup Notification

Oracle Revenue Management and Billing enables you to create a To Do notification when the details to include a member person in a group or individual membership is received in ORMB beyond the late setup threshold days from the member person start date. This notification can help the billing analyst to take appropriate actions, such as giving premium waiver to the member person if required.

To enable this feature, you need to set the following option types in the **C1-ASOBLLNG** feature configuration:

- **Monitor Late Setup** - Used to indicate whether you want to enable the late setup notification feature. The valid values are - **Y** and **N**. By default, the value is set to **N**.
- **Late Setup Threshold in Days** - Used to indicate the number of threshold days for late setup notification. This option type is required when the **Monitor Late Setup** option type is set to **Y**. The value must be greater than zero.

For example, if the system receives the information to add a member person with the start date as **01-15-2021** to an individual membership on **02-15-2021** and the late setup threshold days in the **C1-ASOBLLNG** feature configuration is set to **15**. In this case, the number of days between the member person start date and member person creation date is greater than late setup threshold days, and therefore a To Do is created using the To Do type which is specified in the **C1-LATESET** algorithm attached to the group or individual membership business object, respectively.

To implement this business requirement, the system stores the member person creation date (which was not done in the previous releases) while adding a member person to a group or individual membership. A new batch named **C1-LSUB** is introduced in this release. It derives the creation date for all member persons in the existing group and individual memberships and stamps it against the corresponding record in the **CRE_DTTM** column of the **CI_MEMBERSHIP_PER** table. This batch must be executed only once after upgrading to Oracle Revenue Management and Billing Version 3.1.0.0.0. For more information, refer to *Oracle Revenue Management and Billing Version 3.1.0.0.0 Upgrade Guide.*

Young Adult Coverage in an Individual Membership

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

- **Young Adult Applicability** - Used to indicate whether you want to consider the young adults during the premium calculation. The valid values are - **Yes** and **No**.

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- **Young Adult Max Age Limit** - Used to indicate the maximum age limit for young adults who are eligible for premium calculation. This output parameter is mandatory when the **Young Adult Applicability** parameter is set to **Yes**.

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

- Young Adult Applicability
- Young Adult Max Age Limit

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

- Young Adult Applicability
- Young Adult Max Age Limit

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

Individual Membership Preference

The Individual Membership Preference enables you to set the attributes which are used during the creation of an individual membership. While deriving the details for an individual membership, the system uses the following attributes from the individual membership preference:

- Health Plan Characteristics

You can define, edit, delete, and copy an individual membership preference through the **Field Mapping** screen.

Searching for an Individual Membership Preference

Prerequisites

To search for an individual membership preference, you should have:

- Values defined in the **FIELD_CAT_FLG** lookup field

Procedure

To search for an individual membership preference:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **F** and then click **Field Mapping**.
   A sub-menu appears.
3. Click the **Search** option from the **Field Mapping** sub-menu.
   The **Field Mapping** screen appears.
4. Select the **Individual Membership** option from the **Preference Category** list.
5. Enter the additional search criteria in the **Search Field Mapping** zone.

> **Note:** ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.

6. Click **Search**.

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A list of individual membership preferences that meet the search criteria appears in the **Search Results** section.

Viewing the Individual Membership Preference Details

Procedure

To view the details of an individual membership preference:

1. Search for the individual membership preference in the **Field Mapping** screen.
2. In the **Search Results** section, click the **Broadcast** (📡) icon corresponding to the individual membership preference whose details you want to view.
   The **Field Mapping** zone appears.
3. View the details of the individual membership preference in the **Field Mapping** zone.

Related Topics

For more information on...	See...
How to search for an individual membership preference	Searching for an Individual Membership Preference on page 404

Defining an Individual Membership Preference

Prerequisites

To define an individual membership preference, you should have:

- Values defined in the **FIELD_CAT_FLG** and **FIELD_NAME_FLG** lookup fields
- Required characteristic type defined for the health plan in the application.

Procedure

To define an individual membership preference:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **F** and then click **Field Mapping**.
   A sub-menu appears.
3. Click the **Add** option from the **Field Mapping** sub-menu.

   The **Select Business Object** screen appears. It contains the following field:

Field Name	Field Description	Mandatory (Yes or No)
Field Mapping Business Object	Used to indicate the business object using which you want to create the billing preference. The valid values are: • Field Mapping • Medicare Plan Benefit Package • Membership Status Reason Mapping	Yes

Note: Alternatively, you can access the **Select Business Object** screen by clicking the **Add** button in the **Page Title** area of the **Field Mapping** screen.

4. Select the **Field Mapping** option from the **Field Mapping Business Object** list.

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5. Click **OK**.

   The **Field Mapping** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details of the billing preference. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Preference	Used to specify the individual membership preference.	Yes
Description	Used to specify the description for the individual membership preference.	Yes
Detailed Description	Used to specify additional information about the individual membership preference.	No
Status	Used to indicate the status of the billing preference. The valid values are: • Active • Inactive	Yes

   - **Preference Category** - This section contains the following field:

Field Name	Field Description	Mandatory (Yes or No)
Preference Category	Used to indicate the category to which the preference belongs. The valid values are: • Billing • Binder Payment • Geographic Rating Area • Individual Membership • Medicare • Medicare Plan Benefit • Member Reconciliation • Member Relationship and Subscription Tier • Membership Status Reason • Statement Construct	Yes

   - **Preference Settings** - Used to set the attributes in the individual membership preference. It contains the following fields in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Attribute	Used to indicate the attribute which you want to set in the individual membership preference. The valid values are: • **Health Plan Characteristics** - Used when you want to derive the health plan ID for an individual membership.	Yes (Conditional) **Note:** This field is required while setting an attribute in the individual membership preference.
Value	Used to specify the attribute value. The attribute value that you can specify varies depending on the attribute you want to set in the billing preference:	Yes (Conditional) **Note:** This field is required while setting an attribute in the individual membership preference.

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<table>
<tr><th>Field Name</th><th>Field Description</th><th>Mandatory (Yes or No)</th></tr>
<tr><td></td><td>
<table>
<tr><th>If the attribute is set to...</th><th>Then, this field is...</th></tr>
<tr><td>Health Plan Characteristics</td><td>Used to specify the characteristic type which indicates the plan ID of the health plan. This characteristic type is defined for a health plan. The system uses this plan ID to create a health plan specific contract. The system then uses this characteristic type to determine the account of the financial responsible person for whom the billable charges should be generated.

Note: The list includes only those characteristics which are already defined in the system.</td></tr>
</table>
</td><td></td></tr>
<tr><td>Entity Type</td><td>Used to indicate the type of entity for which the attribute is applicable. The valid values are:
Account
Billable Charge
Note: At present, this data is stored for informational purposes only and is not considered in the business logic. If required, you can add more entity types to the MAP_ENTITY_FLG lookup field.</td><td>No</td></tr>
</table>

Note: While defining an individual membership preference, you must set at least one attribute in the individual membership preference.

6. Select the **Individual Membership** option from the **Preference Category** list.
7. Enter the required details in the **Main** section.
8. Select the required attribute and value from the respective fields.
9. If you want to set more than one attribute in the individual membership preference, click the **Add** (+) icon and then repeat step 8.

Note: However, if you want to remove an attribute from the individual membership preference, click the **Delete** (🗑) icon corresponding to the attribute.

10. Click **Save**.
    The individual membership preference is defined.

Editing an Individual Membership Preference

Prerequisites

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To edit an individual membership preference, you should have:

- Values defined in the **FIELD_CAT_FLG** and **FIELD_NAME_FLG** lookup fields
- Required characteristic type defined for the health plan in the application.

Procedure

To edit an individual membership preference:

1. Search for an individual membership preference in the **Field Mapping** screen.
2. In the **Search Results** section, click the **Edit** (✎) icon in the **Edit** column *c*orresponding to the individual membership preference whose details you want to edit.

   The **Field Mapping** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details of the individual membership preference. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Preference	Displays the individual membership preference.	Not applicable
Description	Used to specify the description for the individual membership preference.	Yes
Detailed Description	Used to specify additional information about the individual membership preference.	No
Status	Used to indicate the status of the individual membership preference. The valid values are: • Active • Inactive	Yes
Preference Category	Indicates the category to which the preference belongs. The valid value is: • Individual Membership	Not applicable

   - **Preference Settings** - Used to set the attributes in the individual membership preference. It contains the following fields in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Attribute	Used to indicate the attribute which you want to set in the individual membership preference. The valid values are: • **Health Plan Characteristics** - Used when you want to derive the additional information of a health plan for an individual membership.	Yes (Conditional) **Note:** This field is required while setting an attribute in the individual membership preference.
Value	Used to specify the attribute value. The attribute value that you can specify varies depending on the attribute you want to set in the individual membership preference:	Yes (Conditional) **Note:** This field is required while setting an attribute in the individual membership preference.

If the attribute is set to...	Then, this field is...
Health Plan Characteristics	Used to specify the health plan characteristics.

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Field Name	Field Description	Mandatory (Yes or No)
	If the attribute is set to... / **Then, this field is...** **Note:** The list includes only those characteristics which are already defined in the system.	
Entity Type	Used to indicate the type of entity for which the attribute is applicable. The valid values are: • Account • Billable Charge **Note:** At present, this data is stored for informational purposes only and is not considered in the business logic. If required, you can add more entity types to the **MAP_ENTITY_FLG** lookup field.	No

Note: Alternatively, you can edit the details of an individual membership by clicking the **Edit** button in the **Field Mapping** zone.

3. Modify the required details in the **Main** section.
4. Define, edit, or remove the attribute from the individual membership, if required.

Note: You must set at least one attribute in an individual membership preference.

5. Click **Save**.
   The changes made to the individual membership are saved.

Related Topics

For more information on...	See...
How to search for an individual membership preference	Searching for an Individual Membership Preference on page 404

Copying an Individual Membership Preference

Instead of creating an individual membership preference from scratch, you can create a new individual membership preference using an existing individual membership preference. This is possible through copying an individual membership preference. On copying an individual membership preference, the details including the attributes are copied to the new individual membership preference. You can then edit the details, if required.

Prerequisites

To copy an individual membership preference, you should have:

- Individual membership preference (whose copy you want to create) defined in the application
- Values defined in the **FIELD_CAT_FLG** and **FIELD_NAME_FLG** lookup fields
- Required characteristic type defined for the health plan in the application.

Procedure

To copy an individual membership preference:

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1. Search for the individual membership preference in the **Field Mapping** screen.
2. In the **Search Results** section, click the **Duplicate** (⎘) icon in the **Duplicate** column *c*orresponding to the individual membership preference whose copy you want to create.

   The **Field Mapping** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details of the individual membership preference. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Preference	Used to specify the individual membership preference.	Yes
Description	Used to specify the description for the individual membership preference.	Yes
Detailed Description	Used to specify additional information about the individual membership preference.	No
Status	Used to indicate the status of the billing preference. The valid values are: • Active • Inactive	Yes
Preference Category	Indicates the category to which the preference belongs. The valid values are: • Individual Membership	Not applicable

   - **Preference Settings** - Used to set the attributes in the individual membership preference. It contains the following fields in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Attribute	Used to indicate the attribute which you want to set in the individual membership preference. The valid values are: • **Health Plan Characteristics** - Used when you want to derive the additional information of a health plan for an individual membership.	Yes (Conditional) **Note:** This field is required while setting an attribute in the individual membership preference.
Value	Used to specify the attribute value. The attribute value that you can specify varies depending on the attribute you want to set in the billing preference: **If the attribute is set to...** / **Then, this field is...** Health Plan Characteristics / Used to specify the health plan characteristics. **Note:** The list includes only those characteristics which are already defined in the system.	Yes (Conditional) **Note:** This field is required while setting an attribute in the individual membership preference.
Entity Type	Used to indicate the type of entity for which the attribute is applicable. The valid values are: • Account	No

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Field Name	Field Description	Mandatory (Yes or No)
	• Billable Charge **Note:** At present, this data is stored for informational purposes only and is not considered in the business logic. If required, you can add more entity types to the **MAP_ENTITY_FLG** lookup field.	

Note: While defining an individual membership preference, you must set at least one attribute in the individual membership preference.

3. Enter the required details in the **Main** section.
4. Define, edit, or remove the attribute from the individual membership preference, if required.
5. Click **Save**.
   The new individual membership preference is defined.

Related Topics

For more information on...	See...
How to search for an individual membership preference	Searching for an Individual Membership Preference on page 404

Deleting an Individual Membership Preference

Procedure

To delete an individual membership preference:

1. Search for the individual membership preference in the **Field Mapping** screen.
2. In the **Search Results** section, click the **Delete** (🗑) icon in the **Delete** column corresponding to the individual membership preference that you want to delete.
   A message appears confirming whether you want to delete the individual membership preference.

Tip: Alternatively, you can delete an individual membership preference by clicking the **Delete** button in the **Field Mapping** zone.

3. Click **OK**.
   The individual membership preference is deleted.

Related Topics

For more information on...	See...
How to search for an individual membership preference	Searching for an Individual Membership Preference on page 404

Binder Payment for Individual Membership

On enrolling for an individual health insurance plan, the financial responsible member person needs to pay first month's premium often called as binder payment to complete the enrollment process. The individual membership enrollment is effectuated when the binder payment is received. The binder payment should be received by the billing system and not by the enrollment system. The binder payment is not required during individual membership renewal and reinstatement.

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Few health insurance payers send bills to collect the binder payment, whereas few do not send bills to collect the binder payment. In other words, the bill generation process for individual membership is kept on hold by some health insurance payers until the binder payment is received.

Oracle Revenue Management and Billing enables you to create binder payments for an individual membership. For more information on how to create a binder payment, see the Binder Payment Creation on page 423 section. While creating an individual membership through a health care inbound message or through a membership repricing inbound web service, you must set the **Binder Payment Applicability** option for the individual membership to either **Y** or **N**. You can set the **Binder Payment Applicability** option to **Y** only when the following conditions are met:

- Individual membership status is set to the value specified in the **Membership Status Code for Pending Effectuation** attribute of the binder payment preference.
- Membership status reason is set to the value specified in the **Membership Status Reason when Awaiting Binder Payment** attribute of the binder payment preference.

The system considers the binder payment preference which is specified in the **Binder Payment Field Mapping** option type of the **C1-ASOBLLNG** feature configuration.

If the **Binder Payment Applicability** option is set to **Y** for an individual membership, it means that the system should monitor whether the binder payment is received before activating the individual membership. On receiving the binder payment for the individual membership, the system only changes the membership and its member persons' status reason and not the membership and its member person' status. The membership and its member persons' status is changed only when the system receives the main subscriber's status update information from the enrollment system through a health care inbound message. However, if the **Binder Payment Applicability** option is set to **N** for an individual membership, it means that binder payment is not required for activating the individual membership. For more information about the binder payment monitor process, see the Binder Payment Monitoring on page 423 section.

If the **Binder Payment Applicability** option is set to **Y** for an individual membership, you need to specify the following binder payment details through a health care inbound message:

- **Grace Days** - Used to calculate the grace date for the individual membership.
- **Binder Liability Amount** - Used to specify the binder liability amount. This data is required when the **Consider Binder Liability Amount** attribute is set to **Y** in the binder payment preference.
- **Threshold Percentage** - Used to specify the threshold percentage using which the threshold amount should be calculated.
- **Hold Billing** - Used to indicate whether you want to hold the bill generation process for the individual membership until the binder payment is received.

The system facilitates you to validate binder payment against the threshold amount. If the **Consider Binder Liability Amount** attribute is set to **Y** in the binder payment preference, the system calculates the threshold amount for the binder payment using the binder liability amount and threshold percentage. For example, if the binder liability amount is set to 50 and threshold percentage is set to 20, the system sets the threshold amount to 10 (i.e. (50*20)/100). The system can receive one or more binder payments for an individual membership. If the **Consider Binder Liability Amount** attribute is set to **Y**, the system must receive the binder payments whose sum is equal to or greater than the threshold amount. However, if the **Consider Binder Liability Amount** attribute is set to **N**, the system does not calculate the threshold amount for the binder payment. In such case, the system must receive a binder payment with the amount greater than zero.

On editing the binder liability amount and threshold percentage for an individual membership, the system recalculates the threshold amount for the binder payment. On creating a billable charge for an individual membership where the **Hold Billing** option is set to **Y**, the system will set the bill after date in the billable charge to a far future date (i.e. 12-31-2099).

Prerequisites

To setup the binder payment process, you need to do the following:

- Define the binder payment identification characteristic type for the payment in the system.
- Define the required status reason for the membership in the system.
- Define the required configurations for the following binder payment fields in the system.

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  - Binder Payment Applicability
  - Hold Billing
  - Threshold Percentage
  - Grace Days
- Define the binder payment field mapping preference in the system.
- Values defined for binder payment in the **FIELD_CAT_FLG** lookup field
- Set the values for the following option types in the **C1-ASOBLLNG** feature configuration:
  - Binder Payment Field Mapping
- Attach an algorithm of the **C1-THRSHDAMT** algorithm type to the **Post-Processing** system event of the **C1-IndMembership** business object.
- Attach an algorithm of the **C1-BNDRH** algorithm type to the **Enter** system event of the **C1-IndMembership** business object where the status is **Active**.
- Attach an algorithm of the **C1-FICRETBC** algorithm type to the **Billable Charge Creation Post Processing** system event of the **Fully Insured Age Based** and **Fully Insured Tier Based** pricing rule type.
- Attach an algorithm of the **C1-BNFTODO** algorithm type and attach it as a soft parameter in the **C1-BPMNT** batch.
- Define the values in the parameter of the **C1-CCPYTSADS** algorithm.
- Lockbox tender types defined in the **C1_LBX_TENDER_TYPE** lookup field.
- Lockbox record type, lockbox reference identification qualifier, and lockbox remittance identification types defined in the **C1_LBX_820_RECORD_TYPE**, **C1_LBX_REF_IDQ_LKP**, and **C1_LBX_RMR_ID_TYPE** lookup fields respectively.

To Do Notification on Binder Payment Cancellation

Oracle Revenue Management and Billing enables you to generate a To Do notification when a binder payment for an individual membership is canceled. To generate the To Do notification when a binder payment is canceled, you need to do the following setup:

- Add the following value in the **MEMB_PERS_STAT_RSN_FLG** lookup field:
  - Binder Payment Canceled
- Add the following status reason for the **Active** status of the **C1-IndMembership** business object:
  - Membership is active but binder payment is canceled
- Add the following the status reason mapping in the preference which is defined using the **Membership Status Reason Mapping** (**C1-MemStatusReasonMapping**) business object:

Member Person Status	**Member Person Status Reason**	**Membership Status Reason**
Active	Binder Payment Canceled	Membership is active but binder payment is canceled

- Define the following attributes in the preference which is defined using the **C1-FieldMapping** (**C1-FieldMapping**) business object and where the preference category is set to **Binder Payment**:

Attribute	**Value**	**Entity Type**
Membership Status Reason when Binder Payment Cancelled	Membership Status Reason Code (of the**Membership is active but binder payment is canceled** status)	Membership
To Do Type for Binder Payment Cancelled	C1-BPCNC	Membership

A new To Do type named **C1-BPCNC** and algorithm type named **C1-BNDPYCNCL** are introduced in this release. To generate the To Do notification during binder payment cancelation, you need to attach an algorithm created using the

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C1-BNDPYCNCL algorithm type to the **Payment Cancellation** system event of the required customer class. If the **C1-BNDPYCNCL** algorithm is attached on the customer class, the system checks whether the cancel reason specified while canceling a payment is listed as a value of the **Binder Payment Cancel Reason List** parameter in the algorithm. If so, the system then validates whether the payment is a binder payment using the **Binder Payment Identification Characteristics Type** attribute of the binder payment preference. If the payment is a binder payment, the system then determines the individual membership whose binder payment is canceled.

Note:

If a payment contains a membership identifier value characteristic that is specified in the **Binder Payment Identification Characteristics Type** attribute of the binder payment preference, the system considers the payment as a binder payment.

The system derives the individual membership using the membership identifier value characteristic on the binder payment and the **Binder Payment Identification ID Type** attribute of the binder payment preference.

Once the individual membership is derived, the system fetches the binder payment applicability flag for the individual membership. If the binder payment applicability flag of the individual membership is set to **No**, the system will not generate the To Do notification when the binder payment is canceled.

However, if the binder payment applicability flag of the individual membership is set to **Yes**, the system will derive the binder payment threshold amount for the respective membership. If the binder payment threshold amount is equal to zero, the system will not generate the To Do notification when the binder payment is canceled.

If the binder payment threshold amount is greater than zero, the system will calculate the grace date (Membership Start Date + (Binder Payment Grace Days -1)) and the total binder payment amount until the grace date. If the **Consider Binder Liability Amount** attribute in the binder payment preference is set to **Y**, the system checks whether the total binder payment amount until the grace date is less than the threshold amount. If the total binder payment amount until the grace date is less than the threshold amount, the system does the following:

- Updates the member person status reason to **Binder Payment Canceled** and the membership status reason to **Membership is active but binder payment is canceled**
- A To Do using the **C1-BPCNC** To Do type is created

However, if the total binder payment amount until the grace date is greater than or equal to the threshold amount, the system neither changes the member person and membership status reasons nor creates a To Do notification when the binder payment is canceled.

If the **Consider Binder Liability Amount** attribute in the binder payment preference is set to **N**, the system checks whether the total binder payment amount until the grace date is equal to zero. If the total binder payment amount until the grace date is equal to zero, the system does the following:

- Updates the member person status reason to **Binder Payment Canceled** and the membership status reason to **Membership is active but binder payment is canceled**
- A To Do using the **C1-BPCNC** To Do type is created

However, if the total binder payment amount until the grace date is greater than zero, the system neither changes the member person and membership status reasons nor creates a To Do notification when the binder payment is canceled.

This algorithm contains the following parameters:

- **Membership Business Object** - Used to specify the individual membership business object. The system will then consider only those individual memberships which are created using the specified business object. Here, you must set the value to **C1-IndMembership**.
- **Algorithm for TO DO Creation** - Used to specify the algorithm using which you want to create a To Do notification during binder payment cancellation. Here, you must set the value to an algorithm which is created using the **C1-BNDTODO** algorithm type.
- **Binder Payment Cancel Reason List** - Used to specify a comma-separated list of payment cancel reasons that the system should consider while To Do generation on payment cancelation. You can specify maximum five comma-separated values for this parameter. Here, you must specify a payment cancel reason which is already defined in the system.

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All the above parameters are mandatory.

Note that the system will update the membership status to **Pending Effectuation** only when the inbound message is received to change the membership status to **Pending Effectuation**. Until then, the member person and membership statuses will not change even if the respective binder payment is canceled.

Transfer Binder Payment from General Suspense Account to Individual Membership Account

Usually, in a fully insured individual business, the binder payments received before the individual membership enrollment are parked in the general suspense account. Oracle Revenue Management and Billing enables you to transfer the binder payments of an individual membership from the general suspense account to the individual member's account after the individual membership enrollment information is received through an inbound message.

To transfer the binder payment from general suspense account to individual membership account, you need to set the value for the following option type in the **C1_CMO** feature configuration:

- **Suspense Contract Type** - Used to indicate the suspense contract type whose suspense contracts' payments you want to transfer to the individual membership account.

A new batch control named **C1-PYTRS** is introduced in this release. It fetches the suspense contracts of the contract type which is specified in the **Suspense Contract Type** option type of the **C1_CMO** feature configuration. Once all suspense contracts are derived, the batch fetches the unmatched frozen payments which are made against the suspense contracts. The batch then checks whether the characteristic type specified in the **Payment Identifier Characteristic Type** parameter is defined on the payment. If the specified characteristic type is defined on the payment, the system considers the payment as the binder payment. If the specified characteristic type is not defined on the payment, the system does not consider the payment as the binder payment.

The batch then derives the individual membership for which the binder payment is made. While deriving the individual membership, the batch uses the membership identifier value characteristic defined on the binder payment and the value specified in the **Membership Identifier Type** parameter. You can specify a comma-separated list of membership identifier types in the **Membership Identifier Type** parameter. The batch then checks whether an individual membership exists with either of the membership identifier type and value combination in the system. Once the individual membership is derived, the batch fetches the individual member's account using the account identifier type and value characteristics which are defined on the individual membership.

Note:

While deriving the account identifier type and value characteristics, the system considers the characteristic types which are specified in the **Account Identifier Type Char Type** and **Account Identifier Value Char Type** option types of the **C1-ASOBLLNG** feature configuration.

If multiple individual memberships are derived with the membership identifier type and value combination, the system will not consider the binder payment for transfer and will accordingly add an appropriate log entry to such binder payments.

Once the individual member's account is derived, the batch transfers the binder payment from the suspense contract to either the unpaid bills or on account contract of the account depending on the following:

- If the match type is specified in the **Bill Match Type** parameter, the batch will transfer the binder payment from the suspense contract against the unpaid bills of the account. While transferring the binder payment against the unpaid bills of the account, the system will do either of the following:
    - If the **C1-MD-ACCT** manual distribution algorithm is attached to the match type, the system will distribute the binder payment against the unpaid bills of the account in the ascending order of the due date. If there are multiple bills with the same due date, the system will consider the unpaid bill in the ascending order of the unpaid amount. However, if there are multiple bills with the same due date and amount, the system will randomly consider the unpaid bill for payment. If there is any excess credit, the system will apply the excess credit amount on the on

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account contract of the individual member's account. Note that the on account contract is derived using the match type specified in the **On Account Match Type** parameter.

- If a manual distribution algorithm is not attached to the match type, the system will distribute the binder payment against the unpaid bills of the account in the ascending order of the due date. If there is any excess credit, the system will apply the excess credit amount on the on account contract of the individual member's account. Note that the on account contract is derived using the match type specified in the **On Account Match Type** parameter.

- If the match type is not specified in the **Bill Match Type** parameter, the batch will transfer the binder payment from the suspense contract to the on account contract of the individual member's account. Note that the on account contract is derived using the match type specified in the **On Account Match Type** parameter.

While transferring the binder payment from the suspense contract to either the unpaid bills or on account contract, the system cancels the old payment on the suspense contract and creates a new payment against the unpaid bills or on account contract of the individual member's account. While canceling the old payment, the system uses the cancel reason specified in the **Payment Cancel Reason for Transfer** parameter. While creating a new binder payment, the system copies all characteristics from the old payment before changing its status to **Frozen**.

This batch is a multi-threaded batch. The multi-threading is based on account ID and chunks for multi-threading are created based on numerical distribution of account ID. This batch contains the following parameters:

Parameter Name	Mandatory (Yes or No)	Description
Payment Identifier Characteristic Type	Yes	Used to specify the characteristic type which stores the membership identifier value. The system then considers a payment as a binder payment if the specified characteristic type is defined on the payment. **Note:** You must specify the characteristic type where the characteristic entity is set to **Payment**.
Membership Identifier Type	Yes	Used to indicate the membership identifier type using which you want to derive the individual membership. If you specify multiple membership identifier types separated by comma, the system will derive the individual membership using either of the membership identifier type and value combinations. **Note:** You must specify a membership identifier type which is already defined in the system. You can specify maximum twenty comma-separated values for this parameter.
Bill Match Type	No	Used to indicate the match type using which you want to transfer the binder payment from the suspense contract to the unpaid bills of the individual member's account. **Note:** You must specify a match type where the entity type is set to **Account**.
On Account Match Type	Yes	Used to indicate the match type using which you want to transfer the binder payment from the suspense contract to the on account contract of the individual member's account.

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Parameter Name	Mandatory (Yes or No)	Description
Payment Cancel Reason for Transfer	Yes	Used to indicate the payment cancel reason that you want to use while canceling the binder payment on the suspense contract. **Note:** You must specify a payment cancel reason which is already defined in the system.
Thread Pool Name	No	Used to specify the thread pool on which you want to execute the batch.

Once the binder payment is transferred from the suspense contract to either the unpaid bills or on account contract of the individual membership's account, the payor account details on the tender is updated to the individual membership's account. Let us understand this with the help of an example.

The following table lists the details of a binder payment which is made against the general suspense account:

Payment Event ID	Account	Payment Amount	Payment Char Type	Payment Char Value	Payment Date	Account Type
PAY_ID1	SUS ACT 1	300	Payment Reference ID	M001	01-Nov-2023	General Suspense Account

Now, when you execute the **C1-PYTRS** batch after the individual membership inbound is received in ORMB, the system derives the individual membership for which binder payment is made and transfers the binder payment from the general suspense account to the individual membership's account. The following table illustrates two payments - one on the general suspense account and another on the individual membership account.

Payment Event ID	Payment ID	Account	Payment Amount	Payment Char Type	Payment Char Value	Payment Date	Payment Match Entity	Status
PAY_ID1	P1	SUS ACT 1	300	Payment Reference ID	M001	01-Nov-2023	General Suspense Account	CANCELLED
PAY_ID1	P2	ACT 1	300	Payment Reference ID	M001	01-Nov-2023	Member Account	FROZEN

Once the payment is created on the individual membership's account, the system updates the payor account on the tender from SUS ACT 1 to ACT 1.

Algorithms Used in Binder Payment

The following table lists the algorithms which are used in the binder payment:

Algorithm	Algorithm Type	Description
C1-THRSHDAMT	C1-THRSHDAMT	Refer to C1-THRSHDAMT on page 422
C1-BNDRH	C1-BNDRH	Refer to C1-BNDRH on page 397
C1-FICRETBC	C1-FICRETBC	Refer to C1-FICRETBC on page 421
C1-CCPYTSADS	C1-CCPYTSADS	Refer to C1-CCPYTSADS on page 419

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Algorithm	Algorithm Type	Description
C1-BNFTODO	C1-BNFTODO	Refer to C1-BNFTODO on page 418

C1-BNDRH

This algorithm is invoked during the membership activation process. It checks whether the binder payment is received for the membership. If the binder payment is received, the membership status is changed from **Pending Effectuation** to **Active**.

Note: At present, this algorithm is invoked only during the membership enrollment and not for membership reinstatement, where the membership status is changed from **Terminated** to **Active**.

This algorithm is invoked using the following scenario:

If...	Then...
The membership is in the **Active** status and the binder payment attributes like the **Consider Binder Liability Amount Flag** is configured as **N** along with the **Membership Status Reason when Binder Payment Received** is configured as **Binder Payment Received** in the **Field Mapping** screen	The system checks whether the hold billing switch in the **CI_MEMBERSHIP** table contains any value. If any value exists, the system releases the billable charges which are kept on hold for the membership. In addition, the system performs the following operations: • Retrieves the account (of the financial responsible person) for the membership. • Retrieves the non-binder payment contracts for the accounts from the **CI_SA** table. • Retrieves the billable charges present on the non-binder payment contracts where the membership ID is stamped as a characteristic. • Checks whether the bill after date of each billable charge contains a future date. If the bill after date contains a future date then it is changed to the system date minus one.

C1-BNFTODO

This algorithm is invoked from the **C1-BNDMNTR** binder payment monitoring batch, specifically for creating a To Do. This algorithm considers the following scenarios:

Scenario	System Behavior
The binder payment is received within the grace days	The algorithm creates a To Do and updates either the membership or corresponding member's status reason to **Binder Payment Received**.
The binder payment is not received within the grace days	The algorithm creates a To Do and updates either the membership or corresponding member's status reason to **Binder Payment not Received**.
The **Consider Binder Liability Amount Flag** attribute is set to **Y** and the binder payment amount is received.	The algorithm retrieves the value of the **To Do Type for Binder Payment Received** attribute from the **Field Mapping** screen and creates the To Do with the message, **Binder Payment of Amount [%1] Received for Membership with Binder Payment Identifier [%2] and Health Plan [%3]**
The **Consider Binder Liability Amount Flag** attribute is set to **N** and at least a single binder payment is received.	The algorithm retrieves the value of the **To Do Type for Binder Payment Received** attribute from the **Field Mapping** screen and creates the To Do with the message, **Binder Payment of Amount [%1] Received for Membership with Binder Payment Identifier [%2] and Health Plan [%3]**
The **Consider Binder Liability Amount Flag** attribute is set to	The algorithm retrieves the value of the **To Do Type for Binder Payment Not Received** attribute from the **Field Mapping** screen and creates the To Do with

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Scenario	System Behavior
Y and the binder payment is not received.	the message, **Binder Payment of expected amount [%1] not received for Membership with Binder Payment Identifier [%2] and Health Plan [%3]**
The **Consider Binder Liability Amount Flag** attribute is set to **N** and not even a single binder payment is received.	The algorithm retrieves the value of the **To Do Type for Binder Payment Not Received** attribute from the **Field Mapping** screen and creates the To Do with the message, **Binder Payment is not received for Membership with Binder Payment Identifier [%1] and Health Plan [%2]**

Note:

- [%1] refers to the total payment amount, comprising of all the payments made till date.
- [%2] refers to the binder payment identifier.
- [%3] refers to the specific health plan.

The **Consider Binder Liability Amount Flag** attribute is configured in the **Field Mapping** screen whereas the **To Do Creation** process happens when the **C1-BNFTODO** algorithm is attached as a soft parameter on the **C1-BNDMNTR** batch.

C1-CCPYTSADS

This algorithm is invoked when it is attached to the **Payment Tender Staging Distribution** system event of the customer class to which the account belongs. In addition, it checks whether the payment received is the first payment for the account. If the payment happens to be the first payment for the account, the payment is applied against the binder contract, which is created using the contract type specified in the payment distribution algorithm of the**Binder Payment** match type.

This algorithm introduces the following new parameters which are used for individual binder payment functionality:

- **Check Binder Payment For Individual** - Used when you want to transfer the payment to the binder contract. The valid values are:
  - **Y**
  - **N**
- **Membership Status Reason** - Used to notify the status reason of the binder payment for the membership. The valid value is:
  - **Awaiting Binder Payment**
- **Exchange Assigned Subscriber Number Characteristic** - Used while creating payment staging characteristic.
- **Exchange Assigned Subscriber Number Id Type** - Used when you want to identify the membership from the membership identifier (**CI_MEMBERSHIP_IDENTIFIER**) table.

This algorithm considers the following scenarios:

If...	Then...
The **Check Promise To Pay** parameter is set to **Y**	The algorithm checks whether there is an active promise to pay for the account. If an active promise to pay exists, the payment is applied against the contract which is created using the contract type specified in the payment distribution algorithm of the **On Account** match type.
The **Check Payment Agreement Request** parameter is set to **Y**	The algorithm checks whether there is an active payment agreement request for the account. If an active payment agreement exists, the payment is applied against the contract which is created using the contract type specified in the payment distribution algorithm of the **On Account** match type.

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If...	Then...
The **Check Promise To Pay** and **Check Payment Agreement Request** parameters are set to **N**	The payment is applied to the account's unpaid bills in the order of the due date. If the payment amount is greater than the sum total of the account's billed balance plus the overpayment threshold amount, the entire payment amount is applied against the excess credit contract of the account.
The payment amount is greater than the account's billed balance, but less than the sum total of the account's billed balance plus the overpayment threshold amount	The payment is first applied against the unpaid bills of the account and the overpayment amount is then applied against the excess credit contract of the account.
The **Check Binder Payment for Individual** parameter is set to **Y**	The algorithm retrieves the membership by using the binder payment identification value which is received in the payment characteristics from the **EDI 820** file.
The **Membership Status Code for Pending Effectuation** attribute is set to **Pending Effectuation** and the **Membership Status Reason Hold / Awaiting Binder Payment** attribute is set to**Awaiting Binder Payment** in the **Field Mapping** screen	The algorithm performs the following steps: **1.** Retrieves the **Binder Contract Type** attribute and its value from the **Field Mapping** screen. **2.** If the contract information is not found in the **Binder Contract Type** attribute then a new contract Id of the type **Binder Contract** is created on the account. If the contract information is found, the contract Id of the account is retrieved using the **Binder Contract Type** attribute. **3.** Creates a payment staging record using the **Binder Payment Match Type** soft parameter and the value as the binder contract Id of the account, retrieved using the **Binder Contract Type** attribute. **4.** Stores the binder payment identification value as a characteristic on the payment.
If the **Membership Status Code for Pending Effectuation** attribute is not **Pending Effectuation** and the **Membership Status Reason Hold / Awaiting Binder Payment** attribute is not **Awaiting Binder Payment** in the **Field Mapping** screen	The algorithm performs the following steps: **1.** The payment is applied against the bill. **2.** The binder payment identification value is added as a characteristic on the payment when the payment is received from the **EDI 820** file against the bill Id. **3.** The already existing soft parameters related to binder payment are removed and the binder related parameters are retrieved from the **Field Mapping** screen.

It contains the following parameters:

- **Check Binder Payment** - Used when you want to check whether the payment is the first payment for the account and the tender used for the payment is not an automatic payment. The valid values are:
  - **Y**
  - **N**
- **Check Promise To Pay** - Used when you want to check whether there is an active promise to pay for the account. The valid values are:
  - **Y**
  - **N**
- **Check Payment Agreement Request** - Used when you want to check whether there is an active payment agreement request for the account. The valid values are:
  - **Y**

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  - **N**
- **Overpayment Threshold Amount** - Used to specify the overpayment threshold amount.
- **Bill Match Type** - Used to specify the match type using which you want to apply the payment against the unpaid bills of the account.
- **Binder Payment Match Type** - Used to specify the match type using which you want to apply the first non-automatic payment against the contract of the account.
- **On Account Match Type** - Used to specify the match type using which you want to apply the payment against the contract of the account.
- **Payment Review Reason Characteristic Type** - Used to specify the characteristic type which you want to use to store the payment reason.
- **Payment Review Reason for Active Promise To Pay** - Used to specify the characteristic value that must be specified when there is an active promise to pay for the account.
- **Payment Review Reason for Active Payment Agreement Request** - Used to specify the characteristic value that must be specified when there is an active payment agreement request for the account.
- **Payment Review Reason for Overpayment** - Used to specify the characteristic value that must be specified when the payment amount is greater than the sum total of account's billed balance plus overpayment threshold amount.
- **Excess Credit Contract Type** - Used to specify the contract type using which the excess credit contract should be created if it does not exist for the account.

C1-FICRETBC

Prerequisites

- Define the values for the option types **CTME (Characteristic Type For Membership Id)** and **PRSQ (Proration SQI)** in the **C1-ASOBLLNG** feature configuration.
- Define the price item which is passed (as a billable charge data) through a health care inbound message.
- Define the pass-through billable charge pricing rule type on the policy plan.

This algorithm is invoked to create SQI (Service Quantity Identifier) based billable charges for fully-insured services. This algorithm creates the following set of SQI based billable charges:

- **Pre-calculated Premium Amount** - SQI based billable charges which are created for pre-calculated premium amount received through a healthcare inbound message.
- **Calculated Premium Amount** - Price items for which the SQI based billable charges are created using the pricing rules defined on the policy plan level.

This algorithm also performs the following operations:

- Creation of the new billable charges.
- Cancellation of the existing billable charges.
- End Date modification of the existing billable charges.

This algorithm is invoked in the following scenarios:

If...	**Then...**
A billable charge exists for a specific date range where the **Billable Charge Status** field is set to **Billable** option which is yet to be processed with the same start date, price item, and membership information	The algorithm modifies only the end date information of that specific billable charge.
The membership is in the **Pending Effectuation** status and the status reason is **Awaiting Binder Payment**, where the status reason is mapped with the attribute value of the **Membership Status Reason Hold / Awaiting Binder Payment** attribute field in **Field Mapping** screen	The algorithm retrieves the values of the binder payment applicability and hold billing switch from the **CI_MEMBERSHIP** table. If the binder payment applicability and the hold billing switch is set to **Y**, the algorithm updates the bill after date information on the billable charge to **31-Dec-2099**.

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If...	Then...
The billable charge for a particular price item and membership appear in the proposed date range and either of them have a different start date or amount	The algorithm cancels the billable charge.

Note:

Billable charges which are created or updated for calculated charges, are updated accordingly in the **PriceCalculationDetail** entity in the **CI_PRCE_CALC** table. Further, those billable charge entries are marked as **Completed**. The Pricing rule type corresponding to the price item (during the processing of the inbound billable charge information) is fetched from the **PricingRuleTypePriceitem** entity in the **C1_PRC_RULE_TYPE_PRICEITEM** table on the first found basis.

The inbound billable charge information is processed as per the latest billable charge data. Once the inbound message is invoked, the algorithm assumes the following conditions:

- The billable charge line characteristics are not available.
- Every billable charge line has the same currency code.

In the case of modification or cancellation of the existing billable charges, its corresponding bill segments go through the following conditions:

- If the billable charge end date is updated, the algorithm checks for all the bill segments where the date range exceeds the billable charge end date. If the date range exceeds the billable charge end date, then only those billable charges are either canceled or deleted based on the status of the bill segment.
- If the billable charge is canceled, then all the bill segments within that billable charge are either canceled or deleted based on the status of the bill segment.

Finally, the billable charges are stamped with the following information:

- Price Item
- SQI (derived from the **C1-ASOBLLNG** feature configuration)
- Pass-through billable charge entries in the **MEMO ONLY** state.
- Aggregated amount is stamped as service quantity.
- Additional information, if any...

It contains the following parameter:

- **Bill To Type Flag** - This flag is used when the **Contract ID** is added in the **MEMBERSHIP_SA** table.

C1-THRSHDAMT

This algorithm is invoked when the membership is in the **Pending Effectuation** status and the status reason is **Awaiting Binder Payment**, as per the binder payment preference configuration done in the **Field Mapping** screen. It monitors or checks the memberships from whom the binder payment is yet to be received.

This algorithm's behavior is shown as follows:

Scenario	System Behavior
If the **BINDER_PAY_APPL_SW** field (also known as the **Binder Payment Applicability** flag) from the **CI_MEMBERSHIP** table is set to **Y**	The algorithm retrieves the **BINDER_LIABILITY_AMT** from the **CI_MEMBERSHIP** table.
If the **Consider Binder Liability Amount Flag** is set to **Y**, and the **Binder Liability Amount** is blank or the **Binder Liability Amount** is less than zero	The algorithm generates an error, **Binder Liability Amount can’t be blank or less than zero if the Consider Liability Amount is Y**.

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Scenario	System Behavior
If the **BINDER_LIABILITY_AMT** field from the **CI_MEMBERSHIP** table is not blank and greater than zero	The algorithm calculates the threshold amount using the following formula, `CI_MEMBERSHIP.THRESHOLD_AMT = ' CI_MEMBERSHIP.BINDER_LIABILITY_AMT * ' (CI_MEMBERSHIP.BINDER_PAY_THRES %)` For example, Let's assume that the binder liability amount is $100 and binder payment threshold percentage is 90%. The algorithm uses the above formula to derive the threshold amount which is $100 * 90% = 90. The calculated threshold amount is added in the **CI_MEMBERSHIP.THRESHOLD_AMT** field for the membership which is in **Pending Effectuation** status where the status reason is **Awaiting Binder Payment**.

Note: The threshold amount is updated whenever the binder liability amount or binder threshold percentage value changes for the membership which is in the **Pending Effectuation** status.

Binder Payment Creation

Oracle Revenue Management and Billing considers a payment as a binder payment when a characteristic is defined for the payment using the characteristic type specified in the **Binder Payment Identification Characteristics Type** attribute of the binder payment preference. The system considers the binder payment preference which is specified in the **Binder Payment Field Mapping** option type of the **C1-ASOBLLNG** feature configuration. This type of characteristic must be defined when the binder payment is created. It stores the membership identifier to indicate the individual membership for which the binder payment is received.

You can create a binder payment through the following features or interfaces:

- Payment Web Service
- Payment Upload
- Payment Upload Staging
- Payment Request
- Payment Event
- EDI 820 File Upload

While creating a payment through any of the above mechanism except the latter one, you need to ensure that the binder payment identification characteristic is defined for the payment. However, in case of EDI 820 File Upload, the system will extract the data stored in the NM1 tag and store it in the payment characteristics staging table. This is done when the **C1-PUPSG** batch is executed.

You can view the binder payments received for the membership or financial responsible member person's account through the **Payment Event Summary** and **Customer 360° Information** screens.

Binder Payment Monitoring

A new batch named **C1-BPMNT** is introduced to monitor the binder payments for the individual memberships. It checks whether there are any individual memberships where:

- Individual membership status is set to the value specified in the **Membership Status Code for Pending Effectuation** attribute of the binder payment preference.
- Membership status reason is set to the value specified in the **Membership Status Reason when Awaiting Binder Payment** attribute of the binder payment preference.

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Note: The batch considers the binder payment preference which is specified in the **Binder Payment Field Mapping** option type of the **C1-ASOBLLNG** feature configuration.

If so, the batch checks whether the **Binder Payment Applicability** option is set to **Y** for the individual membership. If so, the system calculates grace date using the membership start date and grace days. If the grace date is equal to or earlier than system date, the batch derives the account for the individual membership. While deriving the account for the individual membership, the system checks whether the characteristic types specified in the **Account Identifier Type Char Type** and **Account Identifier Value Char Type** option types of the **C1-ASOBLLNG** feature configuration are defined for the individual membership. If so, the system derives the account using these characteristics defined for the individual membership. If these characteristics are not defined for the individual membership, the system derives the account of financially responsible member person. The system checks whether a payment with the binder payment identification characteristic exists against any contract of the account. If so, the system derives the value from the **Binder Payment Identification ID Type** attribute of the binder payment preference. The system then checks whether the binder payments are received for the individual membership using the values from the following:

- Binder Payment Identification Characteristic
- Binder Payment Identification ID Type attribute of the binder payment preference

If the binder payments are received for the individual membership, the system does the following:

If the Consider Binder Lability Amount set to…	**Then...**
Y	The system validates whether the sum of binder payments is equal to or greater than the threshold amount. If so, the system does the following: • Creates a To Do using the To Do type which is specified in the **To Do Type for Binder Payment Received** attribute of the binder payment preference. • Updates the membership status reason to the value specified in the **Membership Status Reason when Binder Payment Received** attribute of the binder payment preference. • Updates the member person status reason using the membership status reason preference which is specified in the **Status Reason Mapping** option type of the **C1-ASOBLLNG** feature configuration. • Changes the bill after date of the billable charges when the **Hold Billing** option for the individual membership is set to **Y**.
N	The system does not validate the binder payment against the threshold amount. If the binder payment amount is greater than zero, the system does the following: • Creates a To Do using the To Do type which is specified in the **To Do Type for Binder Payment Received** attribute of the binder payment preference. • Updates the membership status reason to the value specified in the **Membership Status Reason when Binder Payment Received** attribute of the binder payment preference. • Updates the member person status reason using the membership status reason preference which is specified in the **Status Reason Mapping** option type of the **C1-ASOBLLNG** feature configuration.
	Note: In this case, the system does not update the bill after date of the billable charges when the **Hold Billing** option for the individual membership is set to **Y**. The system updates the bill after date of the billable charges when the status of the individual membership is changed to **Active** through a health care inbound message.

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If the grace date is later than the system date, the batch does the following irrespective of whether the **Consider Binder Lability Amount** attribute is set to **Y** or **N**:

- Creates a To Do using the To Do type which is specified in the **To Do Type for Binder Payment Not Received** attribute of the binder payment preference.
- Updates the membership status reason to the value specified in the **Membership Status Reason when Binder Payment Not Received** attribute of the binder payment preference.
- Updates the member person status reason using the membership status reason preference which is specified in the **Status Reason Mapping** option type of the **C1-ASOBLLNG** feature configuration.

Binder Payment Preference

The Binder Payment Preference enables you to set the attributes which are used during binder payment creation and monitoring. While deriving the binder payment details for a membership, the system uses the following attributes from the binder payment preference:

- Binder Contract Type
- Binder Payment Identification Characteristics Type
- Binder Payment Identification ID Type
- Consider Binder Liability Amount
- Membership Status Code for Active
- Membership Status Code for Pending Effectuation
- Membership Status Reason on Activating Membership
- Membership Status Reason when Awaiting Binder Payment
- Membership Status Reason when Binder Payment Not Received
- Membership Status Reason when Binder Payment Received
- To Do Type for Binder Payment Not Received
- To Do Type for Binder Payment Received

For more information about these attributes, see Defining a Binder Payment Preference on page 426.

The system considers the binder payment preference which is specified in the **Binder Payment Field Mapping** option type of the **C1-ASOBLLNG** feature configuration. You can define, edit, delete, and copy a binder payment preference through the **Field Mapping** screen.

Related Topics

For more information on...	See...
How to setup the **C1-ASOBLLNG** feature configuration	Setting the C1-ASOBLLNG Feature Configuration on page 4417

Searching for a Binder Payment Preference

Prerequisites

To search for a binder payment preference, you should have:

- Values defined in the **FIELD_CAT_FLG** lookup field

Procedure

To search for a binder payment preference:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **F** and then click **Field Mapping**.
   A sub-menu appears.

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3. Click the **Search** option from the **Field Mapping** sub-menu.
   The **Field Mapping** screen appears.
4. Select the **Binder Payment** option from the **Preference Category** list.
5. Enter the additional search criteria in the **Search Field Mapping** zone.

> **Note:** ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.

6. Click **Search**.
   A list of binder payment preferences that meet the search criteria appears in the **Search Results** section.

Viewing the Binder Payment Preference Details

Procedure

To view the details of a binder payment preference:

1. Search for the binder payment preference in the **Field Mapping** screen.
2. In the **Search Results** section, click the **Broadcast** (ᯤ) icon corresponding to the binder payment preference whose details you want to view.
   The **Field Mapping** zone appears.
3. View the details of the binder payment preference in the **Field Mapping** zone.

Related Topics

For more information on...	See...
How to search for a binder payment preference	Searching for a Binder Payment Preference on page 425

Defining a Binder Payment Preference

Prerequisites

To define a binder payment preference, you should have:

- Field mapping business objects defined in the application.
- Values defined for the **Binder Payment Field Mapping** option type in the **C1-ASOBLLNG** feature configuration.
- Values defined in the **FIELD_CAT_FLG** and **MAP_ENTITY_FLG** lookup fields.

Procedure

To define a binder payment preference:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **F** and then click **Field Mapping**.
   A sub-menu appears.
3. Click the **Add** option from the **Field Mapping** sub-menu.

   The **Select Business Object** screen appears. It contains the following field:

Field Name	Field Description	Mandatory (Yes or No)
Field Mapping Business Object	Used to indicate the business object using which you want to create a binder payment preference. The valid values are:	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	• Bill Route Method - Contact Method Mapping • Field Mapping • Medicare Plan Benefit Package • Membership Status Reason Mapping **Note:** The above business object is shipped with the product. The list includes those business objects which are created using the **Field Mapping** (i.e., **C1-FIELDMAP**) maintenance object.	

Note: Alternatively, you can access the **Select Business Object** screen by clicking the **Add** button in the **Page Title** area of the **Field Mapping** screen.

4. Select the **Field Mapping** option from the **Field Mapping Business Object** list.
5. Click **OK**.

   The **Field Mapping** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details of the binder payment preference. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Preference	Used to specify the binder payment preference.	Yes
Description	Used to specify the description for the binder payment preference.	Yes
Detailed Description	Used to specify additional information about the binder payment preference. **Note:** You can resize the text box depending on your requirement by clicking the **Resize Handle** (⇲) icon at the bottom right corner of the text box.	No
Status	Used to indicate the status of the binder payment preference. The valid values are: • Active • Inactive	Yes

   - **Preference Category** - This section contains the following field:

Field Name	Field Description	Mandatory (Yes or No)
Preference Category	Used to indicate the category to which the preference belongs. The valid values are: • Automatic Refund/ Write-Off • Billing • Binder Payment • Configuration for Match Type - Handling Overpayment • Delinquency Process • Delinquency Process Type • Geographic Rating Area	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	• Individual Membership • Medicare • Medicare Plan Benefit • Member Reconciliation • Member Relationship and Subscription Tier • Membership Repricing Reasons • Membership Status Reason • Routing Method - Contact Method Mapping • Statement Construct • Transaction Paid Status Count **Note:** The list includes only those values which are defined in the **FIELD_CAT_FLG** lookup field. You must select **Binder Payment** option as the preference category while creating a binder payment preference.	

- **Preference Settings** - Used to define the settings for the binder payment preference.

Field Name	Field Description	Mandatory (Yes or No)
Attribute	Used to indicate the attribute which you want to set in the binder payment preference. The valid values are: • **Binder Contract Type** - Used when you want to identify the binder contract in the binder payment preference. • **Bill Period for Hold Billing** - • **Consider Binder Liability Amount** - Used when you want to set the consider binder liability amount once the binder payment is received in the binder payment preference. • **Binder Payment Identification Characteristics Type** - Used when you want to identify the membership for whom the payment is received in the binder payment preference. • **Binder Payment Identification ID Type** - Used when you want to identify the membership type in the binder payment preference. • **Membership Status Code for Active** - Used when you want to define the status code when the membership is in the **Active** status in the binder payment preference. • **Membership Status Reason when Binder Payment Canceled** - • **Membership Status Code for Pending Effectuation** - Used when you want to define the status code when the membership is in the **Pending Effectuation** status in the binder payment preference. • **Membership Status Reason on Activating Membership** - Used when you want to define the status reason code once the binder payment is received and the membership status is changed to **Active** for the binder payment preference.	Yes (Conditional) **Note:** This field is required while defining the settings for a binder payment preference.

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Field Name	Field Description	Mandatory (Yes or No)
	• **Membership Status Reason Binder Business Rule Config Invalid** - • **Membership Status Reason when Awaiting Binder Payment** - Used when you want to define the status reason code as **Awaiting Binder Payment** when the binder payment is not yet received for the membership in the binder payment preference. • **Membership Status Reason when Binder Payment Not Received** - Used when you want to define the status reason code as **Binder Payment Not Received** when the binder payment is not received for the membership in the binder payment preference. • **Membership Status Reason when Binder Payment Not Expected** - • **Membership Status Reason when Binder Payment Received** - Used when you want to define the status reason code as **Binder Payment Received** when the binder payment is received for the membership in the binder payment preference. • **To Do Type for Binder configuration not available** - • **To Do Type for Binder Payment not received** - Used when you want to specify a To Do type when the binder payment is not received for the membership in the binder payment preference. • **To Do Type for Binder Payment received** - Used when you want to specify a To Do type when the binder payment is received for the membership in the binder payment preference. • **To Do Type for Binder Payment Canceled** - • **To Do Type for Binder Payment is not expected** -	

Value	Used to specify the attribute value. The list varies depending on the attribute you want to set in the binder payment preference. Below is the list of conditions:
	• If the attribute is set to **Bill Period for Hold Billing** then the list includes only those bill periods for hold billing which are already defined in the system.
	• If the attribute is set to **Consider Binder Liability Amount Flag** then the list includes the following values:
	  • Yes (Y)
	  • No (N)
	Note:
	If the value is set to **Yes (Y)** then the system considers binder liability amount to calculate the threshold amount.
	If the value is set to **No (N)** then the system does not calculate the threshold amount.
	• If the attribute is set to **Binder Payment Identification ID Type** then the list includes only those binder payment
		Yes (Conditional)
		Note: This field is required while defining the settings for a binder payment preference.

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<table>
<tr><th>Field Name</th><th>Field Description</th><th>Mandatory (Yes or No)</th></tr>
<tr><td></td><td>identification ID types which are already defined in the system.
<table><tr><th>If the attribute is set to...</th><th>Then...</th></tr><tr><td>Bill Period for Hold Billing</td><td>The list includes only those bill periods for hold billing which are already defined in the system.</td></tr><tr><td>Consider Binder Liability Amount Flag</td><td>The list includes the following values:
• Yes (Y)
• No (N)
Note:
<table><tr><th>If the value is...</th><th>Then...</th></tr><tr><td>Yes (Y)</td><td>The system considers binder liability amount to calculate the threshold amount.</td></tr><tr><td>No (N)</td><td>The system does not calculate the threshold amount.</td></tr></table></td></tr><tr><td>Binder Payment Identification ID Type</td><td>The list includes only those binder payment identification ID types which are already defined in the system.</td></tr></table></td><td></td></tr>
<tr><td>Entity Type</td><td>Used to indicate the type of entity for which the attribute is applicable. The valid values are:
• Account
• Adjustment
• Billable Charge
• Membership
• Payment
• Policy
Note: At present, this data is stored for informational purposes only and is not considered in the business logic. If required, you can add more entity types to the MAP_ENTITY_FLG lookup field.</td><td>No</td></tr>
</table>

Note: While defining a binder payment preference, you must set at least one attribute in the binder payment preference.

6. Select the **Binder Payment** option from the **Preference Category** list.

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7. Enter the required details in the **Main** section.
8. Select the required attribute and value from the respective fields.
9. If you want to set more than one attribute in the binder payment preference, click the **Add** (+) icon and then repeat step 8.

> **Note:** However, if you want to remove an attribute from the binder payment preference, click the **Delete** (🗑) icon corresponding to the attribute.

10. Click **Save**.
    The binder payment preference is defined.

Editing a Binder Payment Preference

Prerequisites

To edit a binder payment preference, you should have:

- Values defined in the **MAP_ENTITY_FLG** lookup field.

Procedure

To edit a binder payment preference:

1. Search for the binder payment preference in the **Field Mapping** screen.
2. In the **Search Results** section, click the **Edit** (✎) icon in the **Edit** column corresponding to the binder payment preference whose details you want to edit.

   The **Field Mapping** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details of the binder payment preference. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Preference	Displays the binder payment preference.	Not applicable
Description	Used to specify the description for the binder payment preference.	Yes
Detailed Description	Used to specify additional information about the binder payment preference. **Note:** You can resize the text box depending on your requirement by clicking the **Resize Handle** (⇲) icon at the bottom right corner of the text box.	No
Status	Used to indicate the status of the binder payment preference. The valid values are: • Active • Inactive	Yes
Preference Category	Indicates the binder payment category to which the preference belongs.	Not applicable

   - **Preference Settings** - Used to edit the settings for the binder payment preference.

Field Name	Field Description	Mandatory (Yes or No)
Attribute	Used to indicate the attribute which you want to set in the binder payment preference. The valid values are:	Yes (Conditional)

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Field Name	Field Description	Mandatory (Yes or No)
	• **Binder Contract Type** - Used when you want to identify the binder contract in the binder payment preference. • **Bill Period for Hold Billing** - • **Consider Binder Liability Amount** - Used when you want to set the consider binder liability amount once the binder payment is received in the binder payment preference. • **Binder Payment Identification Characteristics Type** - Used when you want to identify the membership for whom the payment is received in the binder payment preference. • **Binder Payment Identification ID Type** - Used when you want to identify the membership type in the binder payment preference. • **Membership Status Code for Active** - Used when you want to define the status code when the membership is in the **Active** status in the binder payment preference. • **Membership Status Reason when Binder Payment Canceled** - • **Membership Status Code for Pending Effectuation** - Used when you want to define the status code when the membership is in the **Pending Effectuation** status in the binder payment preference. • **Membership Status Reason on Activating Membership** - Used when you want to define the status reason code once the binder payment is received and the membership status is changed to **Active** for the binder payment preference. • **Membership Status Reason Binder Business Rule Config Invalid** - • **Membership Status Reason when Awaiting Binder Payment** - Used when you want to define the status reason code as **Awaiting Binder Payment** when the binder payment is not yet received for the membership in the binder payment preference. • **Membership Status Reason when Binder Payment Not Received** - Used when you want to define the status reason code as **Binder Payment Not Received** when the binder payment is not received for the membership in the binder payment preference. • **Membership Status Reason when Binder Payment Not Expected** - • **Membership Status Reason when Binder Payment Received** - Used when you want to define the status reason code as **Binder Payment Received** when the binder payment is received for the membership in the binder payment preference. • **To Do Type for Binder configuration not available** - • **To Do Type for Binder Payment not received** - Used when you want to specify a To Do type when the binder payment is not received for the membership in the binder payment preference.	**Note:** This field is required while editing the settings for a binder payment preference.

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<table>
<tr><th>Field Name</th><th>Field Description</th><th>Mandatory (Yes or No)</th></tr>
<tr><td></td><td>• To Do Type for Binder Payment received - Used when you want to specify a To Do type when the binder payment is received for the membership in the binder payment preference.
• To Do Type for Binder Payment Canceled -
• To Do Type for Binder Payment is not expected -</td><td></td></tr>
<tr><td>Value</td><td>Used to specify the attribute value. The list varies depending on the attribute you want to set in the binder payment preference:
• If the attribute is set to Bill Period for Hold Billing then the list includes only those bill periods for hold billing which are already defined in the system.
• If the attribute is set to Consider Binder Liability Amount Flag then The list includes the following values:
  • Yes (Y)
  • No (N)
Note:
If the value is set to Yes (Y) then the system considers binder liability amount to calculate the threshold amount.
If the value is set to No (N) then The system does not calculate the threshold amount.
• If the attribute is set to Binder Payment Identification ID Type then the list includes only those binder payment identification ID types which are already defined in the system.
<table>
<tr><th>If the attribute is set to...</th><th>Then...</th></tr>
<tr><td>Bill Period for Hold Billing</td><td>The list includes only those bill periods for hold billing which are already defined in the system.</td></tr>
<tr><td>Consider Binder Liability Amount Flag</td><td>The list includes the following values:
• Yes (Y)
• No (N)</td></tr>
</table>
</td><td>Yes (Conditional)
Note: This field is required while editing the settings for a binder payment preference.</td></tr>
</table>

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<table>
<tr><th>Field Name</th><th>Field Description</th><th>Mandatory (Yes or No)</th></tr>
<tr><td></td><td>
<table>
<tr><th>If the attribute is set to...</th><th>Then...</th></tr>
<tr><td></td><td>Note:
<table>
<tr><th>If the value is...</th><th>Then...</th></tr>
<tr><td>Yes (Y)</td><td>The system considers binder liability amount to calculate the threshold amount.</td></tr>
<tr><td>No (N)</td><td>The system does not calculate the threshold amount.</td></tr>
</table></td></tr>
<tr><td>Binder Payment Identification ID Type</td><td>The list includes only those binder payment identification ID types which are already defined in the system.</td></tr>
</table>
</td><td></td></tr>
<tr><td>Entity Type</td><td>Used to indicate the type of entity for which the attribute is applicable. The valid values are:
Account
Adjustment
Billable Charge
Membership
Payment
Policy
Note: At present, this data is stored for informational purposes only and is not considered in the business logic. If required, you can add more entity types to the MAP_ENTITY_FLG lookup field.</td><td>No</td></tr>
</table>

Tip: Alternatively, you can click the **Edit** button in the **Field Mapping** zone to edit the details of the binder payment preference.

3. Modify the required details in the **Main** section.
4. Define, add, or remove the attribute from the binder payment preference, if required.

Note: You must set at least one attribute in a binder payment preference.

5. Click **Save**.
   The changes made to the binder payment preference are saved.

Related Topics

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For more information on...	See...
How to search for a binder payment preference	Searching for a Binder Payment Preference on page 425

Copying a Binder Payment Preference

Instead of creating a binder payment preference from scratch, you can create a new binder payment preference using an existing binder payment preference. This is possible through copying a binder payment preference. On copying a binder payment preference, the details including the attributes are copied to the new binder payment preference. You can then edit the details, if required.

Prerequisites

To copy a binder payment preference, you should have:

- Binder Payment preference (whose copy you want to create) defined in the application
- Values defined in the **MAP_ENTITY_FLG** lookup field

Procedure

To copy a binder payment preference:

1. Search for the binder payment preference in the **Field Mapping** screen.
2. In the **Search Results** section, click the **Duplicate** (⧉) icon in the **Duplicate** column corresponding to the binder payment preference whose copy yo want to create.

   The **Field Mapping** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details of the binder payment preference. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Preference	Used to specify the binder payment preference.	Yes
Description	Used to specify the description for the binder payment preference.	Yes
Detailed Description	Used to specify additional information about the binder payment preference. **Note:** You can resize the text box depending on your requirement by clicking the **Resize Handle** (⤡) icon at the bottom right corner of the text box.	No
Status	Used to indicate the status of the binder payment preference. The valid values are: • Active • Inactive	Yes
Preference Category	Indicates the binder payment category to which the preference belongs.	Not applicable

   - **Preference Settings** - Used to set the attributes in the binder payment preference.

Field Name	Field Description	Mandatory (Yes or No)
Attribute	Used to indicate the attribute which you want to set in the binder payment preference. The valid values are:	Yes (Conditional)

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Field Name	Field Description	Mandatory (Yes or No)
	• **Binder Contract Type** - Used when you want to identify the binder contract in the binder payment preference. • **Bill Period for Hold Billing** - • **Consider Binder Liability Amount** - Used when you want to set the consider binder liability amount once the binder payment is received in the binder payment preference. • **Binder Payment Identification Characteristics Type** - Used when you want to identify the membership for whom the payment is received in the binder payment preference. • **Binder Payment Identification ID Type** - Used when you want to identify the membership type in the binder payment preference. • **Membership Status Code for Active** - Used when you want to define the status code when the membership is in the **Active** status in the binder payment preference. • **Membership Status Reason when Binder Payment Canceled** - • **Membership Status Code for Pending Effectuation** - Used when you want to define the status code when the membership is in the **Pending Effectuation** status in the binder payment preference. • **Membership Status Reason on Activating Membership** - Used when you want to define the status reason code once the binder payment is received and the membership status is changed to **Active** for the binder payment preference. • **Membership Status Reason Binder Business Rule Config Invalid** - • **Membership Status Reason when Awaiting Binder Payment** - Used when you want to define the status reason code as **Awaiting Binder Payment** when the binder payment is not yet received for the membership in the binder payment preference. • **Membership Status Reason when Binder Payment Not Received** - Used when you want to define the status reason code as **Binder Payment Not Received** when the binder payment is not received for the membership in the binder payment preference. • **Membership Status Reason when Binder Payment Not Expected** - • **Membership Status Reason when Binder Payment Received** - Used when you want to define the status reason code as **Binder Payment Received** when the binder payment is received for the membership in the binder payment preference. • **To Do Type for Binder configuration not available** - • **To Do Type for Binder Payment not received** - Used when you want to specify a To Do type when the binder payment is not received for the membership in the binder payment preference.	**Note:** This field is required while defining the settings for a binder payment preference.

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<table>
<tr><th>Field Name</th><th>Field Description</th><th>Mandatory (Yes or No)</th></tr>
<tr><td></td><td>• To Do Type for Binder Payment received - Used when you want to specify a To Do type when the binder payment is received for the membership in the binder payment preference.
• To Do Type for Binder Payment Canceled -
• To Do Type for Binder Payment is not expected -</td><td></td></tr>
<tr><td>Value</td><td>Used to specify the attribute value. The list varies depending on the attribute you want to set in the binder payment preference. Below is the list of conditions:
• If the attribute is set to Bill Period for Hold Billing then the list includes only those bill periods for hold billing which are already defined in the system.
• If the attribute is set to Consider Binder Liability Amount Flag then the list includes the following values:
  • Yes (Y)
  • No (N)
Note:
If the value is set to Yes (Y) then the system considers binder liability amount to calculate the threshold amount.
If the value is set to No (N) then the system does not calculate the threshold amount.
• If the attribute is set to Binder Payment Identification ID Type then the list includes only those binder payment identification ID types which are already defined in the system.
<table><tr><th>If the attribute is set to...</th><th>Then...</th></tr><tr><td>Consider Binder Liability Amount Flag</td><td>The list includes the following values:
• Yes (Y)
• No (N)
Note:<table><tr><th>If the value is...</th><th>Then...</th></tr><tr><td>Yes (Y)</td><td>The system considers binder liability amount to calculate the threshold amount.</td></tr><tr><td>No (N)</td><td>The system does not calculate the threshold amount.</td></tr></table></td></tr></table></td><td>Yes (Conditional)
Note: This field is required while defining the settings for a binder payment preference.</td></tr>
</table>

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Field Name	Field Description	Mandatory (Yes or No)
	If the attribute is set to... / **Then...** Binder Payment Identification ID Type / The list includes only those binder payment identification ID types which are already defined in the system.	
Entity Type	Used to indicate the type of entity for which the attribute is applicable. The valid values are: • Account • Adjustment • Billable Charge • Membership • Payment • Policy **Note:** At present, this data is stored for informational purposes only and is not considered in the business logic. If required, you can add more entity types to the **MAP_ENTITY_FLG** lookup field.	No

Note: While defining a binder payment preference, you must set at least one attribute in the binder payment preference.

Tip: Alternatively, you can click the **Duplicate** button in the **Field Mapping** zone to create a copy of the hold request type.

3. Enter the required details in the **Main** section.
4. Define, edit, or remove the attribute from the binder payment preference, if required.
5. Click **Save**.
   The new binder payment preference is created.

Related Topics

For more information on...	See...
How to search for a binder payment preference	Searching for a Binder Payment Preference on page 425

Deleting a Binder Payment Preference

Procedure

To delete a binder payment preference:

1. Search for the binder payment preference in the **Field Mapping** screen.
2. In the **Search Results** section, click the **Delete** (🗑) icon in the **Delete** column corresponding to the binder payment preference that you want to delete.
   A message appears confirming whether you want to delete the binder payment preference.

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> **Tip:** Alternatively, you can click the **Delete** button in the **Field Mapping** zone to delete the binder payment preference.

3. Click **OK**.
   The binder payment preference is deleted.

Related Topics

For more information on...	See...
How to search for a binder payment preference	Searching for a Binder Payment Preference on page 425

Membership Status Reason Preference

The Membership Status Reason preference enables you to map a member person status and status reason with an individual membership status reason. This mapping is used during:

- **Membership Status Transition** - When the member person status and status reason are received through a health care inbound message or membership repricing inbound web service
- **Member Person Status Transition** - When the binder payment is monitored for the individual membership

The system enables you to define, edit, delete, and copy a membership status reason preference through the **Field Mapping** screen. You can derive the member person status and member person status reason mapping attributes from the values specified in the **MEMBER_PER_STATUS_FLG** and **MEMB_PERS_STAT_RSN_FLG** lookup fields, where as the mapping attributes of the membership status reason can be derived from the **Status Reason** screen.

The system determines the individual membership status reason using the membership status reason preference which is specified in the **Status Reason Mapping** option type of the **C1-ASOBLLNG** feature configuration.

Searching for a Membership Status Reason Preference

Prerequisites

To search for a membership status reason preference, you should have:

- Values defined in the **FIELD_CAT_FLG** lookup field

Procedure

To search for a membership status reason preference:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **F** and then click **Field Mapping**.
   A sub-menu appears.
3. Click the **Search** option from the **Field Mapping** sub-menu.
   The **Field Mapping** screen appears.
4. Select the **Membership Status Reason** option from the **Preference Category** list.
5. Enter the additional search criteria in the **Search Field Mapping** zone.

> **Note:** ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.

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6. Click **Search**.
   A list of membership status reason preferences that meet the search criteria appears in the **Search Results** section.

Viewing the Membership Status Reason Preference Details

Procedure

To view the details of a membership status reason preference:

1. Search for the membership status reason preference in the **Field Mapping** screen.
2. In the **Search Results** section, click the **Broadcast** (📡) icon corresponding to the membership status reason whose details you want to view.
   The **Field Mapping** zone appears.
3. View the details of the membership status reason in the **Field Mapping** zone.

Related Topics

For more information on...	See...
How to search for a membership status reason preference	Searching for a Membership Status Reason Preference on page 439

Defining a Membership Status Reason Preference

Prerequisites

To define a membership status reason preference, you should have:

- Values defined in the **MEMBER_PER_STATUS_FLG** and **MEMB_PERS_STAT_RSN_FLG** lookup field
- Membership status reason defined in the application.

Procedure

To define a membership status reason preference:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **F** and then click **Field Mapping**.
   A sub-menu appears.
3. Click the **Add** option from the **Field Mapping** sub-menu.

   The **Select Business Object** screen appears. It contains the following field:

Field Name	Field Description	Mandatory (Yes or No)
Field Mapping Business Object	Used to indicate the business object using which you want to create the billing preference. The valid values are: • Field Mapping • Medicare Plan Benefit Package • Membership Status Reason Mapping	Yes

Note: Alternatively, you can access the **Select Business Object** screen by clicking the **Add** button in the **Page Title** area of the **Field Mapping** screen.

4. Select the **Membership Status Reason Mapping** option from the **Field Mapping Business Object** list.

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5. Click **OK**.

The **Membership Status Reason Mapping** screen appears. It contains the following sections:

- **Main** - Used to specify basic details of the membership status reason preference. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Preference	Used to specify the membership status reason preference.	Yes
Description	Used to specify the description for the membership status reason preference.	Yes

- **Status Reason Mapping** - Used to create the mappings in the membership status reason preference. It contains the following fields in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Member Person Status	Used to indicate the status of the person in the membership. The valid values are: • Active • Canceled • Inactive • Pending Effectuation **Note:** This list includes only those statuses which are defined in the **MEMBER_PER_STATUS_FLG** lookup field.	Yes (Conditional) **Note:** This field is required while creating a mapping in the membership status reason preference.
Member Person Status Reason	Used to indicate the reason why the status of the member person is changed. The valid values are: • Awaiting Binder Payment • Binder Payment Not Received • Binder Payment Received • Binder payment notification send to upstream • Member is added by mistake • Employee Left organization • New Enrollment • Membership is re-instated • Spouse legally separated • Membership is Terminated **Note:** This list includes only those status reasons which are defined in the **MEMB_PERS_STAT_RSN_FLG** lookup field.	Yes (Conditional) **Note:** This field is required while creating a mapping in the membership status reason preference.
Membership Status Reason	Used to indicate the reason why the status of the membership is changed. **Note:** You must specify a membership status reason which is already defined in the system.	Yes (Conditional) **Note:** This field is required while creating a mapping in the membership status reason preference.

Note: While defining a membership status reason preference, you must create at least one mapping in the membership status reason preference.

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6. Enter the required details in the **Main** section.
7. Select the required status reason mapping from the respective fields.
8. If you want to set more than one status reason mapping in the membership status reason preference, click the **Add** (+) icon and then repeat step 8.

   Note: However, if you want to remove a status reason mapping from the membership status reason preference, click the **Delete** (🗑) icon corresponding to the status reason mapping.
9. Click **Save**.
   The membership status reason preference is defined.

Editing a Membership Status Reason Preference

Prerequisites

To edit a membership status reason preference, you should have:

- Values defined in the **MEMBER_PER_STATUS_FLG** and **MEMB_PERS_STAT_RSN_FLG** lookup field
- Membership status reason defined in the application.

Procedure

To edit a membership status reason preference:

1. Search for the membership status reason preference in the **Field Mapping** screen.
2. In the **Search Results** section, click the **Edit** (✎) icon in the **Edit** column corresponding to the membership status reason preference whose details you want to edit.

   The **Membership Status Reason Mapping** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details of the membership status reason preference. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Preference	Displays the membership status reason preference.	Not applicable
Description	Used to specify the description for the membership status reason preference.	Yes

   - **Status Reason Mapping** - Used to create or edit the mappings in the membership status reason preference. It contains the following fields in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Member Person Status	Used to indicate the status of the person in the membership. The valid values are: • Active • Canceled • Inactive • Pending Effectuation **Note:** This list includes only those statuses which are defined in the **MEMBER_PER_STATUS_FLG** lookup field.	Yes (Conditional) **Note:** This field is required while editing a mapping in the membership status reason preference.
Member Person Status Reason	Used to indicate the reason why the status of the member person is changed. The valid values are: • Awaiting Binder Payment	Yes (Conditional)

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Field Name	Field Description	Mandatory (Yes or No)
	• Binder Payment Not Received • Binder Payment Received • Binder payment notification send to upstream • Member is added by mistake • Employee Left organization • New Enrollment • Membership is re-instated • Spouse legally separated • Membership is Terminated	**Note:** This field is required while editing a mapping in the membership status reason preference.
	Note: This list includes only those status reasons which are defined in the **MEMB_PERS_STAT_RSN_FLG** lookup field.	
Membership Status Reason	Used to indicate the reason why the status of the membership is changed.	Yes (Conditional)
	Note: You must specify a membership status reason which is already defined in the system.	**Note:** This field is required while editing a mapping in the membership status reason preference.

Tip: Alternatively, you can edit the details of a membership status reason preference by clicking the **Edit** button in the **Field Mapping** zone.

3. Modify the required details in the **Main** section.
4. Define, edit, or remove the status reason mapping from the membership status reason preference, if required.

Note: You must create at least one status reason mapping in a membership status reason preference.

5. Click **Save**.
   The changes made to the membership status reason preference are saved.

Related Topics

For more information on...	See...
How to search for a membership status reason preference	Searching for a Membership Status Reason Preference on page 439

Copying a Membership Status Reason Preference

Instead of creating a membership status reason preference from scratch, you can create a new membership status reason preference using an existing membership status reason preference. This is possible through copying a membership status reason preference. On copying a membership status reason preference, the details including the attributes are copied to the new membership status reason preference. You can then edit the details, if required.

Prerequisites

To copy a membership status reason preference, you should have:

- Membership status reason preference (whose copy you want to create) defined in the application
- Values defined in the **MEMBER_PER_STATUS_FLG** and **MEMB_PERS_STAT_RSN_FLG** lookup field
- Membership status reason defined in the application.

Procedure

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To copy a membership status reason preference:

1. Search for the membership status reason preference in the **Field Mapping** screen.
2. In the **Search Results** section, click the **Duplicate** (⧉) icon in the **Duplicate** column *c*orresponding to the membership status reason preference whose copy you want to create.

   The **Membership Status Reason Mapping** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details of the membership status reason preference. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Preference	Used to specify the membership status reason preference.	Yes
Description	Used to specify the description for the membership status reason preference.	Yes

   - **Status Reason Mapping** - Used to create the mappings in the membership status reason preference. It contains the following fields in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Member Person Status	Used to indicate the status of the person in the membership. The valid values are: • Active • Canceled • Inactive • Pending Effectuation **Note:** This list includes only those statuses which are defined in the **MEMBER_PER_STATUS_FLG** lookup field.	Yes (Conditional) **Note:** This field is required while creating a mapping in the membership status reason preference.
Member Person Status Reason	Used to indicate the reason why the status of the member person is changed. The valid values are: • Awaiting Binder Payment • Binder Payment Not Received • Binder Payment Received • Binder payment notification send to upstream • Member is added by mistake • Employee Left organization • New Enrollment • Membership is re-instated • Spouse legally separated • Membership is Terminated **Note:** This list includes only those status reasons which are defined in the **MEMB_PERS_STAT_RSN_FLG** lookup field.	Yes (Conditional) **Note:** This field is required while creating a mapping in the membership status reason preference.
Membership Status Reason	Used to indicate the reason why the status of the membership is changed.	Yes (Conditional)

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Field Name	Field Description	Mandatory (Yes or No)
	Note: You must specify a membership status reason which is already defined in the system.	**Note:** This field is required while creating a mapping in the membership status reason preference.

Note: While defining a membership status reason preference, you must create at least one mapping in the membership status reason preference.

3. Enter the required details in the **Main** section.
4. Define, edit, or remove the mapping from the membership status reason preference, if required.
5. Click **Save**.
   The new membership status reason preference is defined.

Related Topics

For more information on...	See...
How to search for a membership status reason preference	Searching for a Membership Status Reason Preference on page 439

Deleting a Membership Status Reason Preference

Procedure

To delete a membership status reason preference:

1. Search for the membership status reason in the **Field Mapping** screen.
2. In the **Search Results** section, click the **Delete** (🗑) icon in the **Delete** column *c*orresponding to the membership status reason preference that you want to delete.
   A message appears confirming whether you want to delete the membership status reason preference.

Tip: Alternatively, you can delete a membership status reason preference by clicking the **Delete** button in the **Field Mapping** zone.

3. Click **OK**.
   The membership status reason preference is deleted.

Related Topics

For more information on...	See...
How to search for a membership status reason preference	Searching for a Membership Status Reason Preference on page 439

To Do Creation for Manual Refund/Write Off on Individual Membership Cancellation

Oracle Revenue Management and Billing facilitates you with the following on cancelling an individual membership:

- Automatically cancel any refund and/or write off requests which are systematically created through refund/write off instruction via the **Automatic Refund/Write Off** feature.
- Create a To Do for refund and/or write off requests which are manually created for the account via the **Refund/ Write Off Request** feature.

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

- A new algorithm type named **C1-WOCANMCN** is introduced in this release. An algorithm created using the **C1-WOCANMCN** algorithm type is attached to the **Canceled** status in the lifecycle of the **C1-IndMembership** business object.
- The **C1-RFRQC** and **C1-WORQC** To Do types are newly introduced in this release.

On canceling an individual membership, the system determines the account to which the individual membership is billed using the **Account Identifier Type** and **Account Identifier Value** characteristics. While fetching the characteristics, the system considers the characteristic types which are specified in the **Account Identifier Type Char Type** and **Account Identifier Value Char Type** option types of the **C1-ASOBLLNG** feature configuration.

Once the account is derived for an individual membership, the system checks whether there is any refund/write off request created for the account. If so, the system checks whether the refund/write off request is systematically created through refund/write off instruction via the **Automatic Refund/Write Off** feature. If so, the system automatically cancels the refund/write off request of the account. However, if the refund/write off request is not systematically created through refund/write off instruction, the system creates a To Do using the respective To Do type specified in the **C1-WOCANMCN** algorithm. You can then refer this To Do and manually cancel such refund/write off request of the account.

Chapter 8

Customer Registration

Topics:

- Customer Registration (Without Approval) Status Transition
- Customer Registration (With Approval) Status Transition
- Customer Registration Template
- Customer Registration Type
- Customer Registration (Used for Searching)
- Customer Registration (Used for Viewing)

Until now, you were able to create person, account, policy, and policy plan from the different screens. Now, ORMB provides the ability to create a person, multiple accounts for the person, multiple policies for the person, and multiple policy plans for the policy from the same user interface. A new object named **Customer Registration** is introduced in this release. Through a customer registration object, you can create person, accounts, policies, and policy plans at the same time from the same interface. Before creating a customer registration object, you need to create the following:

- Customer Registration Template
- Customer Registration Type

While creating a customer registration object, you need to specify the following:

- A customer registration type using which the customer registration object should be created
- A source system from the customer information is received
- A type of person that you want to create through the customer registration object

Once you specify the above details, the **Customer Registration** screen appears with a set of pages and sections which are added in the respective person template. The default values for the fields, characteristic types, identifier types, and phone types are shown as specified in the person template. In addition, the field values, characteristic types, characteristic values, identifier types, identifier values, phone types, and phone numbers are disabled as specified in the person template. On the Accounts page, you can view one row for each account template which is added in the customer registration type. You can then edit the row and thereby create an account for the person. You can create multiple accounts for the person using the same or different template.

Note:

You cannot create sort records and derivation and pricing parameters for the bill group from the **Customer Registration** screen. You can only create these from the **Customer 360° Information** screen or using the health care inbound message.

The system creates effective dated address using the address business object which is specified in the customer registration type. By default, the account override address is effective from the date when the customer registration object is created in the system.

On the **Policies** page, you can view one row for each policy template which is added in the customer registration type. You can then edit the row and thereby create a policy for the person. You can create multiple policies for the person using the same or different template. On clicking the **Add** icon corresponding

to the policy row, you can view one row for each policy plan template which is added in the customer registration type. You can then edit the row and thereby create a policy plan for the policy.

On clicking the **View/Edit** icon or the **Add New Account** button in the **Accounts** page, the **Customer Registration - Add Account** screen appears with a set of pages and sections which are added in the respective account template. The default values for the fields, characteristic types, and identifier types are shown as specified in the account template. In addition, the field values, characteristic types, characteristic values, identifier types, and identifier values are disabled as specified in the account template.

On clicking the **View/Edit** icon or the **Add New Policy** button in the **Policies** page, you need to specify a policy type. The policy type indicates the category to which the policy belongs (i.e. whether it is Self Funded, Fully-Insured Group, or Fully-Insured Individual) and the policy business object using which the policy should be created. Once you specify a policy type, the **Policy** screen appears with a set of sections which are added in the respective policy template. The default values for the fields and characteristic types are shown as specified in the policy template. In addition, the field values, characteristic types, and characteristic values are disabled as specified in the policy template. You can create one or more policies for the person using the same or different policy type.

On clicking the **View/Edit** icon or the **Add New Plan** button corresponding to a policy plan row in the **Policies** page, the **Plan** screen appears with a set of sections which are added in the respective policy plan template. The default values for the fields and characteristic types are shown as specified in the policy plan template. In addition, the field values, characteristic types, and characteristic values are disabled as specified in the policy plan template.

You can save the person, account, policy, and policy plan details as and when you are entering the data by clicking the **Save as Draft** button. On clicking the **Save as Draft** button, the system creates a customer registration object in the Draft status. The status of the policies which are created through the customer registration object is set to Pending. Once the person, account, policy, and policy plan details are specified, you can click the **Validate and Save** button. The system then validates the information. You can edit, delete, or submit a customer registration object when it is in the **Draft** status. On submitting a customer registration object, the person, accounts, policies, and policy plans are created in the system. Finally, the status of the customer registration object is changed to the following depending on the type of person:

Person Type	**Status**
Parent Customer	Parent Customer Approved
Bill Group	Bill Group Approved
Any Other Person Type Other Than Parent Customer and Bill Group	Complete

You can optionally configure the approval process for the customer registration. If the **Approval Required** option is selected in the customer registration type, the status of the customer registration object is changed to **Approval In Progress** on submitting it. A To Do using the approval To Do type is created and assigned to the users with the approval To Do role. The approver can then review the customer registration object and accordingly approve, reject, or request the submitter to resubmit the customer registration object for approval.

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On approving a customer registration object, the person, accounts, policies, and policy plans are created in the system. Finally, the status of the customer registration object is changed to the following depending on the type of person:

Person Type	**Status**
Parent Customer	Parent Customer Approved
Bill Group	Bill Group Approved
Any Other Person Type Other Than Parent Customer and Bill Group	Complete

If the approver rejects a customer registration object due to some reason, the status of the customer registration object is changed to **Rejected**. However, if the approver requests the submitter to resubmit a customer registration object for approval after making the required changes, the status of the customer registration object is changed to **Draft**. The submitter can then make the required changes and resubmit the customer registration object for approval.

The system provides the following two options while defining a customer registration type:

- **Manual Billing Hierarchy and Pricing**- Used when you want to inform the user to create the billing hierarchy and pricing for the parent customer manually. In other words, you want the user to create the required bill groups for the parent customer, the bill group's accounts, pricing rules, bill group sorting information, and bill group derivation and pricing parameters. If this option is selected, a To Do is created using the **Billing Hierarchy and Pricing** To Do type and assigned to the users with the **Billing Hierarchy and Pricing** To Do role. This feature can be used only for customer registration objects where the person type is set to **Parent Customer**. Once the billing hierarchy and pricing is created for the parent customer, the user must complete the corresponding To Do which is created using the **Billing Hierarchy and Pricing** To Do type. On executing the **Customer Registration Monitor (C1-CUSRG)**batch, the system considers all customer registration objects which are in the **Parent Customer Approved**or **Pending Pricing Correction** status. It checks whether the corresponding To Do (if any) created using the **Billing Hierarchy and Pricing** To Do type is completed. If so, it changes the status of the customer registration object to the following depending on whether the **Final Approval Required** option is selected:

Final Approval Required (Yes or No)	**Status**
Yes	Pending Final Approval
No	Complete

- **Final Approval Required**- Used to indicate whether the final approval is required once the approver at the first level approves the customer registration object. Ideally, the final approval is required when the **Manual Billing Hierarchy and Pricing** option is selected. This ensures that the information related to the following entities is created and verified before the customer registration object moves to the **Complete** status:
  - Bill Group
  - Bill Group's Accounts
  - Bill Group's Sorting Records

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- Bill Group's Derivation and Pricing Parameters
- Pricing Rules for the Policy Plans

If this option is selected, a To Do is created using the **Final Approval** To Do type and assigned to the users with the **Final Approval** To Do role. This feature can be used only for customer registration objects where the person type is set to **Parent Customer**. Once the user with the **Final Approval** To Do role approves the customer registration object, the status of the customer registration object is changed to **Complete**.

If the approver requests the submitter to resubmit a customer registration object for approval, the status of the customer registration object is changed to **Pending Pricing Correction**.

Note: The system enables you to create maximum 10 accounts and 5 policies for a person and maximum 10 policy plans for a policy through a customer registration object from the user interface.

Once the status of a customer registration object is changed to **Complete** or **Bill Group Approved**, the system changes the status of the policies created through the customer registration object to **In Force/Active**. In addition, the status of the pricing rules which are created for such policies' policy plans is set to **Active**.

You can also create a customer registration object using the **File Upload Interface** utility through an inbound message. On creating an inbound message using the **File Upload Interface** utility, the status of the inbound message is set to **Pending**. Once the inbound message is processed, a customer registration object is created in the following status depending on the person type:

Person Type	**Status**
Parent Customer	Complete
Bill Group	Bill Group Approved
Any Other Person Type Other Than Parent Customer and Bill Group	Complete

Note: The above status transition is mentioned based on the assumption that the data uploaded through the **File Upload Interface** utility will be pre-approved and does not require any approval in the system.

At present, only the XML format is supported for creating a customer registration object using the File Upload Interface utility through an inbound message. To implement the Customer Registration feature, the following new screens are introduced in this release:

- Customer Registration Template
- Customer Registration Type
- Customer Registration

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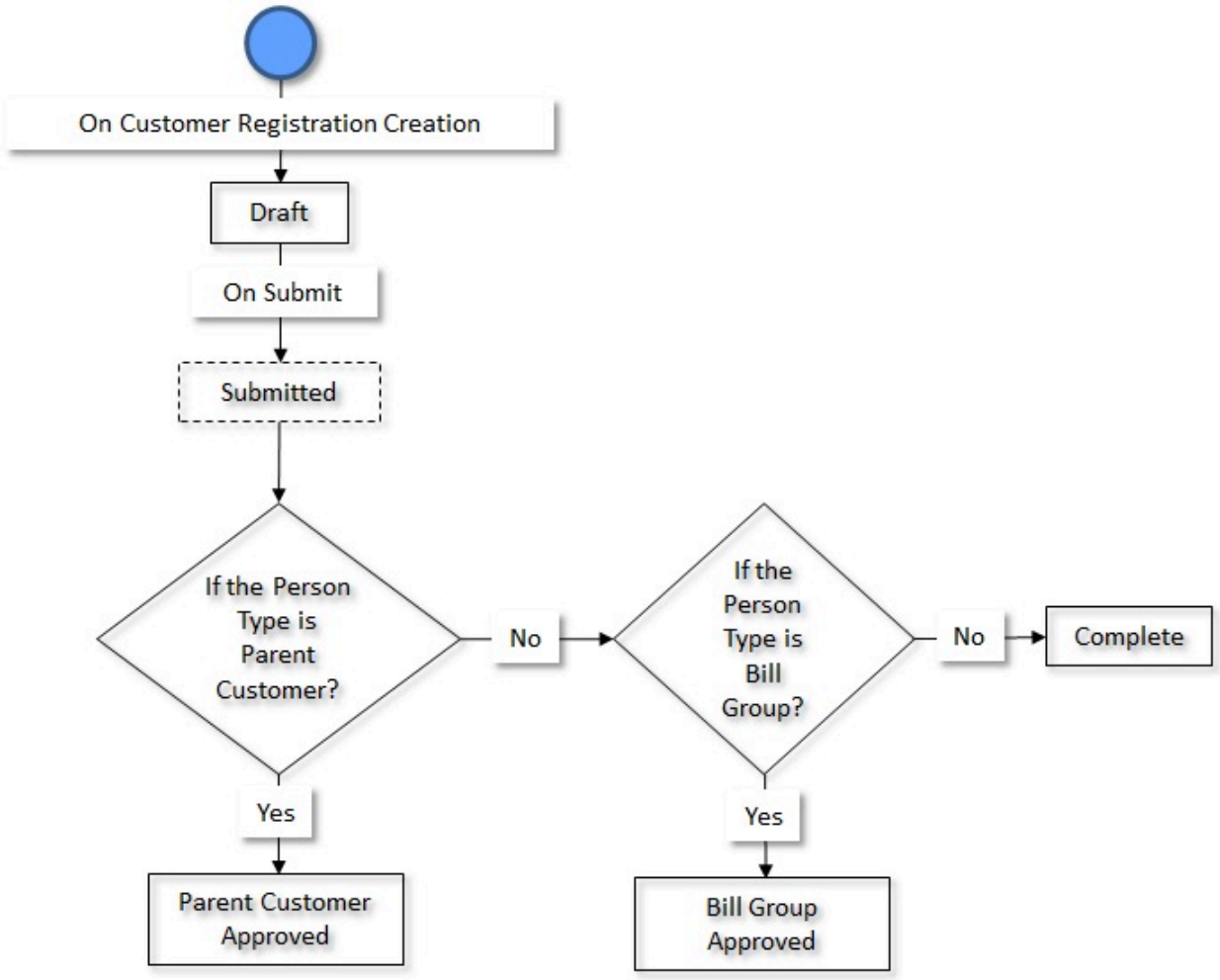
Customer Registration (Without Approval) Status Transition

The following figure graphically indicates how a customer registration object moves from one status to another when the approval process is not configured in the customer registration type:



Customer Registration (With Approval) Status Transition

The following figure graphically indicates how a customer registration object moves from one status to another when the approval process is configured in the customer registration type:

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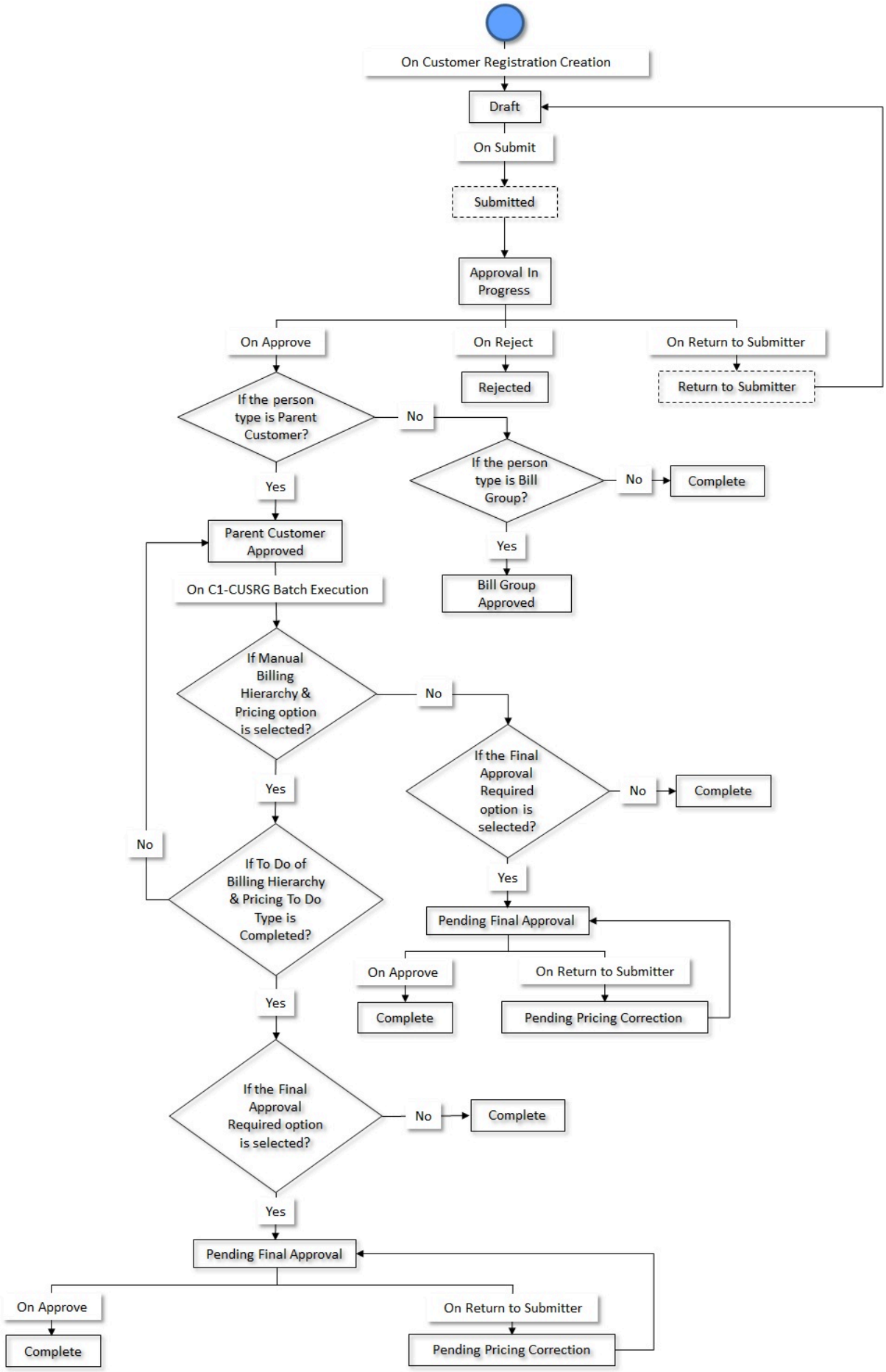

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Customer Registration Template

A customer registration template encapsulates the following information:

- List of pages that should appear when you create a person, account, policy, or policy plan using the respective customer registration template
- List of sections that should appear in each page
- Field or characteristic attributes, such as:
  - Default value for a field or characteristic type
  - Default value for a person or account identifier type or phone type
  - Primary identifier type for a person or account
  - Mandatory field in each section
  - Enable or disable the field value, identifier type, identifier value, characteristic type, characteristic value, phone type, or phone number

You can create multiple customer registration templates for person, account, policy and policy plan. Depending on whether you are creating a customer registration template for person, account, policy or policy plan, you can include the following pages and define field or characteristic attributes for the following sections:

The following table lists the pages and sections that are available in the respective template category:

Template Category	Template Page	Template Section
Person	Main	Person Main
		Person Names
		Person Identifiers
		Person Phones
	Contact Information	Person Address
		Person Email
	Accounts	-
	Person Hierarchy	Person Hierarchy - Main
		Person Hierarchy - Characteristics
	Person Characteristics	Person Characteristics
	Policies	Policies
		Parent Policies
	Registration Characteristics	Customer Registration Characteristics
Account	Main	Account Information
		Account Identifiers
	Auto Pay	Account Autopay
	Persons	Main
		Account Address Override Information
		Bill Routing

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Template Category	Template Page	Template Section
	Account Characteristics	Account Characteristics
Policy	Policy - Main	Policy Main
		Policy Persons
		Policy Characteristics
Policy Plan	Plan	Plan - Main
		Plan - Characteristics

Search Customer Registration Template

The **Search Customer Registration Template** zone allows you to search for a customer registration template using various search criteria. It contains the following sections:

- **Search Criteria** - The **Search Criteria** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Search By	Used to indicate whether you want to search for customer registration templates using the banking template or the healthcare template details. The valid values are: • **Banking Template** - Used to indicate whether you want to search for customer registration templates created using the **C1-CustomerRegistrationTmplBK** business object. • **Healthcare Template** - Used to indicate whether you want to search for customer registration templates created using the **C1-CustomerRegistrationTmplHC** business object. **Note:** By default, the **Banking Template** option is selected.	Yes
Template	Used to search for a particular template.	No
Description	Used to search for customer registration templates having a particular description.	No
Template Category	Used to search for customer registration templates which belong to a particular category. The valid values are: • Account • Person • Policy • Policy Plan **Note:** The **Policy** and **Policy Plan** options appear when you select the **Healthcare Template** option from the **Search By** list.	No

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Note: You must specify at least one search criterion while searching for a customer registration template.

- **Search Results** - On clicking the **Search** button, the search results appear based on the specified search criteria. The **Search Results** section contains the following columns:

Column Name	Column Description
Template	Displays the customer registration template.
Description	Displays the description of the customer registration template.
Template Category	Displays the category to which the customer registration template belongs. The valid values are: • Account • Person • Policy • Policy Plan
Edit	On clicking the **Edit**() icon, the **Customer Registration Template** screen appears where you can edit the details of the customer registration template.
Duplicate	On clicking the **Duplicate**() icon, the **Customer Registration Template** screen appears where you can define a new customer registration template using an existing customer registration template.
Delete	On clicking the **Delete** () icon, you can delete the customer registration template. **Note:** You can delete a customer registration template when a customer registration is not yet defined using the customer registration template.

On clicking the **Broadcast** () icon corresponding to a customer registration template, the **Customer Registration Template** zone appears with the details of the respective customer registration template.

By default, the **Filter** area is hidden. You can view the **Filter** area by clicking the **Filters** () icon in the upper right corner of this zone.

Note: Pagination is used to display limited number of records in the **Search Results** section. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

Related Topics

For more information on...	See...
How to search for a customer registration template	Searching for a Customer Registration Template on page 457
Customer Registration Template zone	Customer Registration Template on page 455

Customer Registration Template

The **Customer Registration Template** zone displays the details of the customer registration template. It also allows you to edit, copy, and delete the customer registration template. It contains the following sections

- **Main** - Displays the basic information about the customer registration template. It contains the following fields:

Field Name	Field Description
Template	Displays the customer registration template.

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Field Name	Field Description
Template Category	Indicates the category for which the customer registration template is created in the system. The valid values are: • Account • Person • Policy • Policy Plan
	Note: The **Policy** and **Policy Plan** template categories appear when the customer registration template is created using the **C1-CustomerRegistrationTmplHC** business object.
Description	Displays the description of the customer registration template.
Detailed Description	Displays additional information about the customer registration template.

- **Template Pages** - The **Template Pages** section lists the template pages, template sections added for a particular template category in a customer registration template. It contains the following columns:

Column Name	Column Description
Template Page	Indicates the template page which is added for the template category.
Template Section	Indicates the template section which is defined for the template page.

- **Record Actions** - The **Record Actions** section contains the following buttons:

Button Name	Button Description
Edit	Used to edit the details of the customer registration template.
Delete	Used to delete the customer registration template.
	Note: You can delete a customer registration template when a customer registration is not yet created using the customer registration template.
Duplicate	Used to create a new customer registration template using an existing customer registration template.

- **Record Information** - The **Record Information** section contains the following field:

Field Name	Field Description
Business Object	Indicates the business object using which the customer registration template is created in the system. In addition, a context menu appears corresponding to this field which helps in navigating to other screens in the application.
	Note: It has a link. On clicking the link, the **Business Object** screen appears where you can view the details of the respective business object.

By default, the **Customer Registration Template** zone does not appear in the **Customer Registration Template** screen. It appears when you click the **Broadcast** (📡) icon corresponding to the customer registration template in the **Search Customer Registration Template** zone.

Related Topics

For more information on...	See...
How to define a customer registration template	Defining a Customer Registration Template on page 458

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For more information on...	See...
How to edit a customer registration template	Editing a Customer Registration Template on page 469
How to copy a customer registration template	Copying a Customer Registration Template on page 470
How to delete a customer registration template	Deleting a Customer Registration Template on page 471
How to view the details of a customer registration template	Viewing the Customer Registration Template Details on page 457
Customer Registration Template screen	Customer Registration Template on page 453
Search Customer Registration Template zone	Search Customer Registration Template on page 454

Searching for a Customer Registration Template

Prerequisites

To search for a customer registration template, you should have:

- Customer registration template business objects defined in the application
- Customer registration templates defined in the application
- Customer registration templates associated with the template categories

Procedure

To search for a customer registration template:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **C** and then click **Customer Registration Template**.
   A sub-menu appears.
3. Click the **Search** option from the **Customer Registration Template** sub-menu.
   The **Customer Registration Template** screen appears.
4. Enter the search criteria in the **Search Customer Registration Template** zone.

> **Note:** ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.

5. Click **Search**.
   A list of customer registration templates that meet the search criteria appears in the **Search Results** section.

Related Topics

For more information on...	See...
Customer Registration Template screen	Customer Registration Template on page 453
Search Customer Registration Template zone	Search Customer Registration Template on page 454

Viewing the Customer Registration Template Details

Procedure

To view the details of a customer registration template:

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1. Search for the customer registration template in the **Customer Registration Template** screen.
2. In the **Search Results** section, click the **Broadcast** (📡) icon corresponding to the customer registration *t*emplate whose details you want to view.
   The **Customer Registration Template** zone appears.
3. View the details of the customer registration template in the **Customer Registration Template** zone.

Related Topics

For more information on...	See...
How to search for a customer registration template	Searching for a Customer Registration Template on page 457
Search Customer Registration Template zone	Search Customer Registration Template on page 454
Customer Registration Template zone	Customer Registration Template on page 455

Defining a Customer Registration Template

Prerequisites

To define a customer registration template, you should have:

- Customer registration template business objects defined in the application
- Template categories defined in the application
- Template pages and sections defined in the application

Procedure

To define a customer registration template:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **C** and then click **Customer Registration Template**.
   A sub-menu appears.
3. Click the **Add** option from the **Customer Registration Template** sub-menu.

   The **Select Business Object** screen appears. It contains the following field:

Field Name	Field Description	Mandatory (Yes or No)
Customer Registration Template Business Object	Used to indicate the business object using which you want to define the customer registration template. The valid values are: • **Customer Registration Template - Banking** - Used to indicate that you want to define a customer registration template using the **C1-CustomerRegistrationTmplBK** business object. • **Customer Registration Template - Health Care** - Used to indicate that you want to define a customer registration template using the **C1-CustomerRegistrationTmplHC** business object.	Yes

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> **Tip:** Alternatively, you can access the **Select Business Object** screen by clicking the **Add** button in the **Page Title** area of the **Customer Registration Template** screen.

4. Select the required customer registration template business object from the respective field.
5. Click **OK**.

   The **Customer Registration Template for Banking** or the **Customer Registration Template for Healthcare** screen appears depending upon the selected business object. It contains the following sections:

   - **Main** - Used to specify basic details about the customer registration template.
   - **Template Pages** - Used to add template pages and its related sections for the customer registration template.
   - **Main** - The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Template	Used to specify the customer registration template.	Yes
Template Category	Used to indicate the category for which you want to define the customer registration template. The valid values are: • Account • Person • Policy • Policy Plan **Note:** The **Policy** and **Policy Plan** options appear when you are defining a customer registration template using the **C1-CustomerRegistrationTmplHC** business object.	Yes
Business Object	Indicates the business object using which you want to define the customer registration template.	Not applicable
Description	Used to specify the description for the customer registration template.	Yes
Detailed Description	Used to specify additional information about the customer registration template.	No

6. Enter the required details in the **Main** section.
7. Add the template pages and template sections for the customer registration template in the **Template Pages** section.
8. Set the field attributes for the template sections in the **Template Pages** section.
9. Click **Save**.
   The customer registration template is defined.

Related Topics

For more information on...	See...
Customer Registration Template screen	Customer Registration Template on page 453
How to add the pages and sections in a customer registration template	Adding the Pages and Sections in a Customer Registration Template on page 460

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For more information on...	See...
How to set the field attributes for a template section	Setting the Field Attributes for a Template Section on page 463

Adding the Pages and Sections in a Customer Registration Template

Prerequisites

To add a page and its related sections in a customer registration template, you should have:

- Template categories defined in the application
- Template pages and sections defined in the application

Procedure

To define a customer registration template:

1. Ensure that the **Template Pages** section is expanded when you are defining, editing, or copying a customer *r*egistration template.

   The **Template Pages** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Template Page	Used to indicate the page which you want to add in a customer registration template for a particular template category.	Yes (Conditional) **Note:** This field is required while adding pages and sections in a customer registration template.
Template Section	Used to indicate the section and its field attributes which you want to define for a particular page in a customer registration template. **Note:** On clicking the **Add** (+) icon, the following columns appear: **Column Name** / **Column Description** Template Section: Used to indicate the section for a particular page. Field Attributes: Used to define the field attributes of a section. **Note:** On clicking the **Add** (+) icon, you can define the field attributes for the section.	Yes (Conditional) **Note:** This field is required while adding pages and sections in a customer registration template.

   The following table lists the various pages and sections that you can include in a customer registration template:

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Template Category	Template Pages		Template Sections	
	Template Page	**Mandatory (Yes or No)**	**Template Section**	**Mandatory (Yes or No)**
Account	Auto Pay	No	Account Autopay	No
	Account Characteristics	No	Account Characteristics	No
	Credit Ratings **Note:** This template page appears when you are defining, editing, or copying a customer registration template which is created using the **C1-Customer Registration TmplBK** business object.	No	Credit Rating	No
	Main	Yes	Account Identifiers	Yes
			Account Information	Yes
	Persons	Yes	Account Address Override Information	No
			Bill Routing	Yes
			Main	Yes
Person	Accounts	No	-	-
	Contact Information	No	Person Address	No
			Person Email	No
	Deal Information **Note:** This template page appears when you are defining, editing, or copying a customer registration template which is created using the **C1-Customer Registration TmplBK** business object.	No	Deal-Main	No

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Template Category	Template Pages		Template Sections	
	Template Page	**Mandatory (Yes or No)**	**Template Section**	**Mandatory (Yes or No)**
	Main	Yes	Person Identifiers	Yes
			Person Main	Yes
			Person Names	Yes
			Person Phones	No
	Person Characteristics	No	Person Characteristics	No
	Person Hierarchy	No	Person Hierarchy-Characteristics	No
			Person Hierarchy-Main	No
	Policies	No	Parent Policy	No
	Note: This template page appears only when you are defining, editing, or copying a customer registration template which is created using the **C1-CustomerRegistrationTmplHC** business object.		Policies	No
	Registration Characteristics	No	Customer Registration Characteristics	No
Policy	Policy-Main	Yes	Policy Characteristics	No
Note: This template category appears only when you are defining, editing, or copying a customer registration template which is created using the **C1-CustomerRegistrationTmplHC** business object.			Policy-Main	Yes
			Policy Persons	No
Policy Plan	Plan	Yes	Plan-Characteristics	No

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Template Category	Template Pages		Template Sections	
	Template Page	**Mandatory (Yes or No)**	**Template Section**	**Mandatory (Yes or No)**
Note: This template category appears when you are defining, editing, or copying a customer registration template which is created using the **C1-CustomerRegistration TmplHC** business object.			Plan-Main	Yes

2. Enter the required details in the **Template Pages** section.
3. Set the field attributes for the template section, if required.
4. If you want to add more than one page or section for the customer registration template, click the **Add** (+) icon and *t*hen repeat step *2*.

Note: However, if you want to remove a page or section from the customer registration template, click the **Delete** (🗑) icon corresponding to the page or section.

5. Click **Save**.
The pages and sections are added in the customer registration template.

Note:

You can add all the template pages available for a particular template category by clicking the **Select All** check box in the upper left corner of the **Template Pages** section.

You cannot edit or delete a template page or section if a customer registration is already defined using the customer registration template.

Related Topics

For more information on...	See...
Customer Registration Template screen	Customer Registration Template on page 453
How to define a customer registration template	Defining a Customer Registration Template on page 458
How to set the field attributes for a template section	Setting the Field Attributes for a Template Section on page 463
How to edit a customer registration template	Editing a Customer Registration Template on page 469
How to copy a customer registration template	Copying a Customer Registration Template on page 470

Setting the Field Attributes for a Template Section

Prerequisites

To set the field attributes for a template section, you should have:

- Template pages and sections associated with the template category
- Fields for the sections defined in the application

Procedure

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To set the field attributes for a template section:

1. Ensure that the **Template Pages** section is expanded when you are defining, editing, or copying a customer *r*egistration template.

   The **Template Pages** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Template Page	Used to indicate the page which you want to add in a customer registration template for a particular template category.	Yes (Conditional) **Note:** This field is required while adding pages and sections in a customer registration template.
Template Section	Used to indicate the section and its field attributes which you want to define for a particular page in a customer registration template. **Note:** On clicking the **Add** (+) icon, the following columns appear: **Column Name** / **Column Description** Template Section – Used to indicate the section for a particular page. Field Attributes – Used to define the field attributes of a section. **Note:** On clicking the **Add** (+) icon, you can define the field attributes for the section.	Yes (Conditional) **Note:** This field is required while adding pages and sections in a customer registration template.

2. Select the template page and template section from the respective columns.
3. Click the **Add** (+) icon in the **Field Attributes** column corresponding to the template section whose field *a*ttributes you want to set.

   It contains the following fields in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Sequence	Used to specify the sequence of the field attribute.	Yes (Conditional) **Note:** This field is required while setting the field attributes for a template section.
Field	Used to indicate the field for which you want to set attributes.	Yes (Conditional)

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The **Search** (🔍) icon appears corresponding to this field. On clicking the **Search** icon, the **Field Search** window appears. On specifying the field, the description of the field appears corresponding to the field.	**Note:** This field is required while setting the field attributes for a template section.
Default Field Value	Used to indicate the default value for the field in the template section.	Yes (Conditional)
	Note: On specifying a field, the **Search** (🔍) icon appears corresponding to the **Default Field Value** field. On clicking the **Search** icon, a window appears depending on the field that you have selected. On specifying the default field value, the description of the default field value appears corresponding to the default field value.	**Note:** This field is required while setting the field attributes for a template section.
Required	Used to indicate whether the field is mandatory in the template section.	Yes (Conditional)
	Note: By default, the check box in the **Required** column is disabled. It is enabled when you specify the field in the **Field** column.	**Note:** This field is required while setting the field attributes for a template section.
Disable Field Value	Used to indicate whether the field is disabled in the template section.	Yes (Conditional)
	Note: By default, the check box in the **Disable Field Value** column is disabled. It is enabled when you specify the field in the **Field** column.	**Note:** This field is required while setting the field attributes for a template section.
Identifier Type	Used to indicate the type of identifier for which you want to set attributes.	Yes (Conditional)
	Note: On specifying a field, the **Search** (🔍) icon appears corresponding to the **Identifier Type** field. On clicking the **Search** icon, the **Search Zone for Person Identifier** window appears. On specifying the identifier type, the description of the identifier type appears corresponding to the **Identifier Type** field.	**Note:** This field is required while setting the field attributes for a template section.
Identifier Value	Used to specify the value for the identifier type for which you want to set attributes.	Yes (Conditional)

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Field Name	Field Description	Mandatory (Yes or No)
	Note: By default, this field is disabled. It is enabled when you specify the identifier type in the **Identifier Type** column.	**Note:** This field is required while setting the field attributes for a template section.
Primary ID	Used to indicate whether the identifier type and identifier value are primary or not. **Note:** By default, the check box in the **Primary ID** field is disabled. It is enabled when you specify the identifier type in the **Identifier Type** column.	Yes (Conditional) **Note:** This field is required while setting the field attributes for a template section.
Disable Identifier Type	Used to indicate whether the identifier type is disabled in the template section. **Note:** By default, the check box in the **Disable Identifier Type** column is disabled. It is enabled when you specify the identifier type in the **Identifier Type** column.	Yes (Conditional) **Note:** This field is required while setting the field attributes for a template section.
Disable Identifier Value	Used to indicate whether the identifier value is disabled in the template section. **Note:** By default, the check box in the **Disable Identifier Value** column is disabled. It is enabled when you specify the identifier value in the **Identifier Value** column.	Yes (Conditional) **Note:** This field is required while setting the field attributes for a template section.
Name Type	Used to indicate the type of name for which you want to set attributes. **Note:** On specifying a field, the **Search** (🔍) icon appears corresponding to the **Name Type** field. On clicking the **Search** icon, the **Search Zone for Person Name Type** window appears. On specifying the name type, the description of the name type appears corresponding to the **Name Type** field.	Yes (Conditional) **Note:** This field is required while setting the field attributes for a template section.
Name	Used to specify the name of the person. **Note:** By default, this field is disabled. It is enabled when you specify the name type in the **Name Type** column.	Yes (Conditional) **Note:** This field is required while setting the field attributes for a template section.
Disable Name Type	Used to indicate whether the name type is disabled in the template section.	Yes (Conditional)

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Field Name	Field Description	Mandatory (Yes or No)
	Note: By default, the check box in the **Disable Name Type** column is disabled. It is enabled only when you specify the name type in the **Name Type** column.	**Note:** This field is required while setting the field attributes for a template section.
Disable Name	Used to indicate whether the specified name of the person is disabled in the template section.	Yes (Conditional)
	Note: By default, the check box in the **Disable Name** column is disabled. It is enabled when you specify the name in the **Name** column.	**Note:** This field is required while setting the field attributes for a template section.
Phone Type	Used to specify the type of phone for which you want to set attributes.	Yes (Conditional)
	Note: On specifying a field, the**Search** (🔍) icon appears corresponding to the **Phone Type** field. On clicking the **Search** icon, the **Search Zone for Phone Type** window appears. On specifying the phone type, the description of the phone type appears corresponding to the **Phone Type** field.	**Note:** This field is required while setting the field attributes for a template section.
Phone Number	Used to specify the phone number.	Yes (Conditional)
	Note: By default, this field is disabled. It is enabled when you specify the phone type in the **Phone Type** column.	**Note:** This field is required while setting the field attributes for a template section.
Disable Phone Type	Used to indicate whether the phone type is disabled in the template section.	Yes (Conditional)
	Note: By default, the check box in the **Disable Phone Type** column is disabled. It is enabled when you specify the phone type in the **Phone Type** column.	**Note:** This field is required while setting the field attributes for a template section.
Disable Phone Number	Used to indicate whether the specified phone number is disabled in the template section.	Yes (Conditional)
	Note: By default, the check box in the **Disable Phone Number** column is disabled. It is enabled when you specify the phone number in the **Phone Number** column.	**Note:** This field is required while setting the field attributes for a template section.
Characteristic Information	Used to indicate the characteristic type and characteristic value for which you want to set attributes.	Yes (Conditional)

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Field Name	Field Description	Mandatory (Yes or No)
	Note: On specifying the characteristic type, the characteristic value field appears in the **Characteristic Information** column. On specifying a predefined characteristic type, the**Search** (🔍) icon appears corresponding to the characteristic value field. On clicking the **Search** icon, the **Predefined Characteristic Search** window appears. On specifying the value for a predefined characteristic type, the description of the characteristic value appears corresponding to the characteristic value field..	**Note:** This field is required while setting the field attributes for a template section.
Disable Characteristic Type	Used to indicate whether the characteristic type is disabled in the template section. **Note:** By default, the check box in the **Disable Characteristic Type** column is disabled. It is enabled when you specify the characteristic type in the **Characteristic Type** column.	Yes (Conditional) **Note:** This field is required while setting the field attributes for a template section.
Disable Characteristic Value	Used to indicate whether the characteristic is disabled in the template section. **Note:** By default, the check box in the **Disable Characteristic Value** column is disabled. It is enabled when you specify the characteristic value in the **Characteristic Value** column.	Yes (Conditional) **Note:** This field is required while setting the field attributes for a template section.

4. Enter the required details in the **Template Pages** section.
5. If you want to set more than one field attribute for the template section, click the **Add** (+) icon and then *r*epeat step *2*.

> **Note:** However, if you want to remove a field attribute from the template section, click the **Delete** (🗑) icon corresponding to the field.

6. Click **Save**.
   The field attributes are set for the template section.

Related Topics

For more information on...	See...
Customer Registration Template screen	Customer Registration Template on page 453
How to define a customer registration template	Defining a Customer Registration Template on page 458
How to edit a customer registration template	Editing a Customer Registration Template on page 469
How to copy a customer registration template	Copying a Customer Registration Template on page 470

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Editing a Customer Registration Template

Prerequisites

To edit a customer registration template, you should have:

- Template categories defined in the application
- Template pages and sections defined in the application

Procedure

To edit a customer registration template:

1. Search for the customer registration template in the **Customer Registration Template** screen.
2. In the **Search Results** section, click the **Edit** (✎) icon in the **Edit** column corresponding to the customer *r*egistration template whose details you want to edit.

   The **Customer Registration Template for Banking** or the **Customer Registration Template for Healthcare** screen appears depending upon the business object using which the customer registration template is defined. It contains the following sections:

   - **Main** - Used to specify basic details about the customer registration template.
   - **Template Pages** - Used to add template pages and its related sections for the customer registration template.
   - **Main** - The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Template	Displays the customer registration template.	Not applicable
Template Category	Used to indicate the category for which you want to define the customer registration template. The valid values are: • Account • Person • Policy • Policy Plan **Note:** The **Policy** and **Policy Plan** options appear when you are defining a customer registration template using the **C1-CustomerRegistrationTmplHC** business object.	Yes
Business Object	Indicates the business object using which the customer registration template is defined in the system.	Not applicable
Description	Used to specify the description for the customer registration template.	Yes
Detailed Description	Used to specify additional information about the customer registration template.	No

Tip: Alternatively, you can edit the details of a customer registration template by clicking the **Edit** button in the **Customer Registration Template** zone.

3. Modify the details in the **Main** section, if required.

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4. Add, edit, or remove the template pages and template sections from the customer registration template, if required.
5. Add, edit, or remove the field attributes from the template section, if required.
6. Click **Save**.
   The changes made to the customer registration template are saved.

> **Note:** You can edit a customer registration template only when a customer registration it is not yet defined using the customer registration template.

Related Topics

For more information on...	See...
Search Customer Registration Template zone	Search Customer Registration Template on page 454
Customer Registration Template screen	Customer Registration Template on page 453
Customer Registration Template zone	Customer Registration Template on page 455
How to add the pages and sections in a customer registration template	Adding the Pages and Sections in a Customer Registration Template on page 460
How to set the field attributes for a template section	Setting the Field Attributes for a Template Section on page 463

Copying a Customer Registration Template

Instead of creating a customer registration template from scratch, you can create a new customer registration template using an existing customer registration template. This is possible through copying a customer registration template. On copying a customer registration template, the details including the template pages, template sections, and field attributes for the template sections are copied to the new customer registration template. You can then edit the details, if required.

Prerequisites

To copy a customer registration template, you should have:

- Customer registration template (whose copy you want to create) defined in the application
- Template categories defined in the application
- Template pages and sections defined in the application

Procedure

To copy a customer registration template:

1. Search for the customer registration template in the **Customer Registration Template** screen.
2. In the **Search Results** section, click the **Duplicate** (⧉) icon in the **Duplicate** column corresponding to the *c*ustomer registration template whose copy you want to create.

   The **Customer Registration Template for Banking** or the **Customer Registration Template for Healthcare** screen appears depending upon the business object using which the customer registration template whose copy you want to create is defined. It contains the following sections:

   - **Main** - Used to specify basic details about the customer registration template.
   - **Template Pages** - Used to add template pages and its related sections for the customer registration template.
   - **Main** - The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Template	Used to specify the customer registration template.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
Template Category	Used to indicate the category for which you want to define the customer registration template. The valid values are: • Account • Person • Policy • Policy Plan **Note:** The **Policy** and **Policy Plan** options appear when you are defining a customer registration template using the **C1-CustomerRegistrationTmplHC** business object.	Yes
Business Object	Indicates the business object using which the customer registration template is defined in the system.	Not applicable
Description	Used to specify the description for the customer registration template.	Yes
Detailed Description	Used to specify additional information about the customer registration template.	No

Tip: Alternatively, you can copy a customer registration template by clicking the **Duplicate** button in the **Customer Registration Template** zone.

3. Enter the required details in the **Main** section.
4. Add, edit, or remove the template pages and template sections from the customer registration template, if required.
5. Add, edit, or remove the field attributes from the template section, if required.
6. Click **Save**.
   The new customer registration template is defined.

Related Topics

For more information on...	See...
Search Customer Registration Template zone	Search Customer Registration Template on page 454
Customer Registration Template screen	Customer Registration Template on page 453
Customer Registration Template zone	Customer Registration Template on page 455
How to add the pages and sections in a customer registration template	Adding the Pages and Sections in a Customer Registration Template on page 460
How to set the field attributes for a template section	Setting the Field Attributes for a Template Section on page 463

Deleting a Customer Registration Template

Procedure

To delete a Customer Registration Template:

1. Search for the customer registration template in the **Customer Registration Template** screen.

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2. In the **Search Results** section, click the **Delete** (🗑) icon in the **Delete** column corresponding to the customer *r*egistration template that you want to delete.

   A message appears confirming whether you want to delete the customer registration template.
3. Click **OK**.
   The customer registration template is deleted.

> **Note:** You can delete a customer registration template when a customer registration is not yet created using the customer registration template.

> **Tip:** Alternatively, you can delete a customer registration template by clicking the **Delete** button in the **Customer Registration Template** zone.

Related Topics

For more information on...	See...
Customer Registration Template screen	Customer Registration Template on page 453
Search Customer Registration Template zone	Search Customer Registration Template on page 454
Customer Registration Template zone	Customer Registration Template on page 455

Customer Registration Type

A customer registration type encapsulates the following information:

- Users with a particular access group can only create a customer registration object using the customer registration type
- Whether the customer registration type can be used to create a customer registration object from the user interface, through the inbound message, or through the **File Upload Interface** utility
- Whether the approval is required when you create, edit, or delete a customer registration object
- Whether the final level approval is required once the approver at the first level approves the customer registration object
- Whether a To Do should be created indicating that the users have to manually create the billing hierarchy and pricing for the parent customer.
- The business objects using which the person, account, policy plan, membership, and address should be created when a customer registration object is created using the customer registration type
- A customer registration template which indicates the pages and sections that should appear when you are creating a customer registration object using the customer registration type. You can specify one customer registration template for person and one or more customer registration templates for account, policy, and policy plan.
- Information, such as person names, person identifiers, person phones, person characteristics, person addresses, person hierarchy, accounts, account identifiers, account characteristics, account auto pay information, account persons, account bill routing information, policies, policy plans, policy characteristics, or policy plan characteristics, which should be copied when you create a copy of a customer registration object which is created using the customer registration type.

Related Topics

For more information on...	See...
Customer Registration Type List zone	Customer Registration Type List on page 473
Customer Registration Type zone	Customer Registration Type on page 474
How to search for a customer registration type	Searching for a Customer Registration Type on page 480

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For more information on...	See...
How to view the details of a customer registration type	Viewing the Customer Registration Type Details on page 498
How to define a customer registration type	Defining a Customer Registration Type on page 481
How to edit a customer registration type	Editing a Customer Registration Type on page 493
How to copy a customer registration type	Copying a Customer Registration Type on page 495
How to delete a customer registration type	Deleting a Customer Registration Type on page 498

Customer Registration Type List

The **Customer Registration Type List** zone lists the customer registration types that are already defined in the system. It contains the following columns:

Column Name	Column Description
Customer Registration Type	Displays the customer registration type.
Description	Displays the description of the customer registration type.
Edit	On clicking the **Edit** (✎) icon, the **Customer Registration Type** screen appears where you can edit the details of the customer registration type.
Duplicate	On clicking the **Duplicate** (⧉) icon, the **Customer Registration Type** screen appears where you can define a new customer registration type using an existing customer registration type.
Delete	On clicking the **Delete** (🗑) icon, you can delete the customer registration type.
	Note: You can delete a customer registration type when a customer registration is not yet defined using the customer registration type.

You can filter the list using various search criteria (such as, **Customer Registration Type** and **Description**) available in the **Filter** area. By default, the **Filter** area is hidden. You can view the **Filter** area by clicking the **Filters** (▽) icon in the upper right corner of this zone.

On clicking the **Broadcast** (📡) icon corresponding to a customer registration type, the **Customer Registration Type** zone appears with the details of the respective customer registration type.

Note: Pagination is used to display limited number of records in this zone. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

Related Topics

For more information on...	See...
How to view the details of a customer registration type	Viewing the Customer Registration Type Details on page 498
How to edit a customer registration type	Editing a Customer Registration Type on page 493
How to copy a customer registration type	Copying a Customer Registration Type on page 495
How to delete a customer registration type	Deleting a Customer Registration Type on page 498

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Customer Registration Type

The **Customer Registration Type** zone displays the details of the customer registration type. It contains the following sections:

- **Main** - Displays the basic information about the customer registration type. It contains the following fields:

Field Name	Field Description
Customer Registration Type	Displays the customer registration type.
Description	Displays the description of the customer registration type.
Customer Registration Business Object	Indicates the business object using which the customer registration is created in the system. In addition, a context menu appears corresponding to this field which helps in navigating to other screens in the application. The valid values are: • **Customer Registration - Banking** - Indicates customer registration is created using the **C1-CustomerRegistrationBanking** business object. • **Customer Registration - Health Care** - Indicates customer registration is created using the **C1-CustomerRegistrationHC** business object. **Note:** It has a link. On clicking the link, the **Business Object** screen appears where you can view the details of the respective business object.
Detailed Description	Displays additional information about the customer registration type.
Status	Indicates the status of the customer registration type. The valid values are: • Active • Inactive **Note:** You cannot change the status of a customer registration type to **Inactive** when the corresponding customer registration is in a status other than **Processed** or **Rejected**.
Access Group	Displays the user group that can access the customer registration created using the customer registration type. **Note:** It has a link. On clicking the link, the **Access Group** screen appears where you can view the details of the respective access group.
Registration Source	Indicates the source through which the customer registration is created using the customer registration type. The valid values are: • File Upload • Inbound Message • Manual

- **Additional Data** - Displays additional information about the customer registration type. It contains the following fields:

Field Name	Field Description
Approval Required	Indicates whether approval is required while creating the customer registration using the customer registration type.
Approval To Do Type	Indicates that the To Do entry of the specified To Do type is created when you submit the customer registration for approval.

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Field Name	Field Description
	Note: This field appears when the **Approval Required** check box is selected. It has a link. On clicking the link, the **To Do Type** screen appears with the details of the respective To Do type.
Approval To Do Role	Indicates that users with the specified To Do role can only approve, reject, or resubmit the customer registration for approval.
	Note: This field appears when the **Approval Required** check box is selected. It has a link. On clicking the link, the **To Do Role** screen appears with the details of the respective To Do role.
Submitter To Do Type	Indicates the To Do entry of the specified To Do type is created when the customer registration is resubmitted by the approver.
	Note: It has a link. On clicking the link, the **To Do Type** screen appears where you can view the details of the respective To Do type.
Submitter To Do Role	Indicates the users with the specified To Do role for whom the To Do task is created when the customer registration is resubmitted by the approver.
	Note: It has a link. On clicking the link, the **To Do Role** screen appears where you can view the details of the respective To Do role.
Final Approval Required	Indicates whether the final approval is required once the approver at the first level approves the customer registration.
	Note: This field appears when the **Customer Registration Type** is created using the **C1-CustRegTypeHealthCare** business object. The final approval is required when the **Manual Billing Hierarchy and Pricing** option check box is selected.
Final Approval To Do Type	Indicates that the To Do entry of the specified To Do type is created when you submit the customer registration for final approval.
	Note: It has a link. On clicking the link, the **To Do Type** screen appears with the details of the respective To Do type. This field appears when the **Final Approval Required** check box is selected.

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Field Name	Field Description
Final Approval To Do Role	Indicates that users with the specified To Do role can only approve or resubmit the customer registration for final approval.
	Note: It has a link. On clicking the link, the **To Do Role** screen appears where you can view the details of the respective To Do role. This field appears when the **Final Approval Required** check box is selected.
Manual Billing Hierarchy and Pricing	Indicates whether the required bill groups for the parent customer, the bill group's accounts, pricing rules, bill group sorting information, and bill group derivation and pricing parameters are created manually by the user while defining the customer registration.
	Note: This field appears when the **Customer Registration Type** is created using the **C1-CustRegTypeHealthCare** business object. This feature is used only for customer registration objects where the person type is set to **Parent Customer**.
Billing Hierarchy and Pricing To Do Type	Indicates the To Do entry of the specified To Do type is created for the user to define or edit the billing hierarchy and pricing for the parent customer manually.
	Note: It has a link. On clicking the link, the **To Do Type** screen appears with the details of the respective To Do type. This field appears when the **Manual Billing Hierarchy and Pricing** check box is selected.
Billing Hierarchy and Pricing To Do Role	Indicates users with the specified To Do role can only define or edit the billing hierarchy and pricing for the parent customer manually.
	Note: It has a link. On clicking the link, the **To Do Role** screen appears where you can view the details of the respective To Do role. This field appears when the **Manual Billing Hierarchy and Pricing** check box is selected.
Person Business Object	Indicates the business object using which the person is created while defining the customer registration.
	Note: It has a link. On clicking the link, the **Business Object** screen appears where you can view the details of the respective business object.
Account Business Object	Indicates the business object using which the account is created while defining the customer registration.

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Field Name	Field Description
	Note: It has a link. On clicking the link, the **Business Object** screen appears where you can view the details of the respective business object.
Policy Plan Business Object	Indicates the business object using which the policy plan is created while defining the customer registration.
	Note: It has a link. On clicking the link, the **Business Object** screen appears where you can view the details of the respective business object. This field appears when the **Customer Registration Type** is created using the **C1-CustRegTypeHealthCare** business object.
Benefits Business Object	Indicates the business object using which the benefit is created while defining the customer registration.
	Note: It has a link. On clicking the link, the **Business Object** screen appears where you can view the details of the respective business object.
Membership Business Object	Indicates the business object using which the membership is created while defining the customer registration.
	Note: It has a link. On clicking the link, the **Business Object** screen appears where you can view the details of the respective business object. This field appears when the **Customer Registration Type** is created using the **C1-CustRegTypeHealthCare** business object.
Address Business Object	Indicates the business object using which the address is created while defining the customer registration.
	Note: It has a link. On clicking the link, the **Business Object** screen appears where you can view the details of the respective business object.
Statement Construct Business Object	Indicates the business object using which the statement construct is created while defining the customer registration.
	Note: It has a link. On clicking the link, the **Business Object** screen appears where you can view the details of the respective business object.

- **Characteristics** - Lists the characteristics defined for the customer registration type. It contains the following columns:

Column Name	Column Description
Characteristic Type	Indicates the characteristic type.
Characteristic Value	Displays the value of the characteristic type.

- **Customer Registration Templates** - Lists the templates that are associated with the customer registration type for creating a customer registration. It contains the following columns:

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Column Name	Column Description
Sequence	Displays the sequence of the customer registration template.
Template Category	Indicates the category to which the customer registration template belongs. The valid values are: • Person • Account • Policy • Policy Plan **Note:** The **Policy** and **Policy Plan** template categories appear when the **Customer Registration Type** is created using the **C1-CustRegTypeHealthCare** business object.
Template	Displays the customer registration template associated with the customer registration type. **Note:** It has a link. On clicking the link, the **Customer Registration Template** screen appears where you can view the details of the respective customer registration template.

- **Record Actions** - The **Record Actions** section contains the following buttons:

Button Name	Button Description
Edit	Used to edit the details of the customer registration type.
Delete	Used to delete the customer registration type. **Note:** You can delete a customer registration type when a customer registration is not yet defined using the customer registration type.
Duplicate	Used to create a new customer registration type using an existing customer registration type.

- **Record Information** - The **Record Information** section contains the following field:

Field Name	Field Description
Business Object	Indicates the business object using which the customer registration type is created in the system. In addition, a context menu appears corresponding to this field which helps in navigating to other screens in the application. **Note:** It has a link. On clicking the link, the **Business Object** screen appears where you can view the details of the respective business object.

- **Copy Customer Registration Details** - Enables you to specify the type of information you want to copy while defining a customer registration using an existing customer registration. It contains the following fields:

Column Name	Column Description
Person Names	Indicates whether you want to copy the person details while copying a customer registration.
Accounts	Indicates whether you want to copy the account details while copying a customer registration.

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Column Name	Column Description
Person Identifiers	Indicates whether you want to copy the person identifier details while copying a customer registration.
Account Identifiers	Indicates whether you want to copy the account identifier details while copying a customer registration.
Person Phones	Indicates whether you want to copy the phone details of the person while copying a customer registration.
Account Characteristics	Indicates whether you want to copy the characteristic details of the account while copying a customer registration.
Person Characteristics	Indicates whether you want to copy the characteristic details of the person while copying a customer registration.
Account Auto Pay Information	Indicates whether you want to copy the automatic payment details of the account while copying a customer registration.
Person Addresses	Indicates whether you want to copy the address details of the person while copying a customer registration.
Account Persons	Indicates whether you want to copy the details of the persons related to the account while copying a customer registration.
Person Hierarchy	Indicates whether you want to copy the person hierarchy details while copying a customer registration.
Account Override Address	Indicates whether you want to copy the account override address details while copying a customer registration.
Bill Routing Information	Indicates whether you want to copy the bill routing details of the account while copying a customer registration.
Credit Rating History	Indicates whether you want to copy the credit rating history details while copying a customer registration.
Policies	Indicates whether you want to copy the policy details while copying a customer registration. **Note:** This field appears when the **Customer Registration Type** is created using the **C1-CustRegTypeHealthCare** business object.
Policy Plans	Indicates whether you want to copy the policy plan details while copying a customer registration. **Note:** This field appears only when the **Customer Registration Type** is created using the **C1-CustRegTypeHealthCare** business object.
Policy Characteristics	Indicates whether you want to copy the policy characteristic details while copying a customer registration. **Note:** This field appears when the **Customer Registration Type** is created using the **C1-CustRegTypeHealthCare** business object.
Policy Plan Characteristics	Indicates whether you want to copy the policy plan characteristic details while copying a customer registration.

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Column Name	Column Description
	Note: This field appears when the **Customer Registration Type** is created using the **C1-CustRegTypeHealthCare** business object.

By default, the **Customer Registration Type** zone does not appear in the **Customer Registration Type** screen. It appears when you click the **Broadcast** (📡) icon corresponding to a customer registration type in the **Customer Registration Type List** zone.

Related Topics

For more information on...	See...
How to define a customer registration type	Defining a Customer Registration Type on page 481
How to edit a customer registration type	Editing a Customer Registration Type on page 493
How to copy a customer registration type	Copying a Customer Registration Type on page 495
How to delete a customer registration type	Deleting a Customer Registration Type on page 498
How to view the details of a customer registration type	Viewing the Customer Registration Type Details on page 498

Searching for a Customer Registration Type

Prerequisites

To search for a customer registration type, you should have:

- Customer registration types defined in the application

Procedure

To search for a customer registration type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **C** and then click **Customer Registration Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Customer Registration Type** sub-menu.
   The **Customer Registration Type** screen appears with a list of customer registration types in the **Customer Registration Type List** zone.
4. Click the **Filters** (▽) icon in the title bar of the **Customer Registration Type List** zone.
   It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Customer Registration Type	Used to search for a particular customer registration type.	No
Description	Used to search for customer registration types having a particular description.	No

5. Enter the search criteria in the **Customer Registration Type List** zone.

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> **Note:** ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.

6. Click **Search**.
   A list of customer registration types that meet the search criteria appears in the **Search Results** section.

Related Topics

For more information on...	See...
Customer Registration Type screen	Customer Registration Type on page 472
Customer Registration Type zone	Customer Registration Type on page 474

Defining a Customer Registration Type

Prerequisites

To define a customer registration type, you should have:

- Customer registration type business objects defined in the application
- Customer registration business objects defined in the application
- Access groups defined in the application
- Registration sources defined in the application
- Statement construct business object defined in the application
- Benefit business object defined in the application
- Person, account, policy plan, membership, and address business objects defined in the application

> **Note:** The policy plan and membership business objects are required when you are defining a customer registration type using the **C1-CustRegTypeHealthCare** business object.

- Approval To Do types and To Do roles defined in the application
- Billing hierarchy and pricing To Do types and To Do roles defined in the application

> **Note:** The billing hierarchy and pricing To Do types and To Do roles are required when you are defining a customer registration type using the **C1-CustRegTypeHealthCare** business object.

- Characteristic types defined in the application
- Template categories defined in the application

Procedure

To define a customer registration type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **C** and then click **Customer Registration Type**.
   A sub-menu appears.
3. Click the **Add** option from the **Customer Registration Type** sub-menu.

   The **Select Business Object** screen appears. It contains the following field:

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Field Name	Field Description	Mandatory (Yes or No)
Customer Registration Type Business Object	Used to indicate the business object using which you want to create the customer registration type. The valid values are: • Customer Registration Type - Banking • Customer Registration Type - Healthcare	Yes

Tip: Alternatively, you can access the **Select Business Object** screen by clicking the **Add** button in the **Page Title** area of the **Customer Registration Type** screen.

Note: The **Select Business Object** screen appears when there are multiple customer registration type business objects defined in the application. If there is only one customer registration type business object defined in the application, the **Customer Registration Type** screen appears.

4. Select the required customer registration business object from the respective field.
5. Click **OK**.

The **Customer Registration Type** screen appears. It contains the following sections:

- **Main** - Used to specify basic details about the customer registration type.
- **Additional Data** - Used to define additional information about the customer registration type.
- **Characteristics** - Used to define a list characteristics for the customer registration type.
- **Customer Registration Templates** - Used to associate templates with the customer registration type.
- **Copy Customer Registration Details** - Used to specify the type of information you want to copy while defining a customer registration using an existing customer registration.

- **Main** - The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Customer Registration Type	Used to specify the customer registration type.	Yes
Business Object	Indicates the business object using which you want to create the customer registration type.	Not applicable
Description	Used to specify the description for the customer registration type.	Yes
Customer Registration Business Object	Used to indicate the business object using which you want to create the customer registration in the system.	Yes
Detailed Description	Used to specify additional information about the customer registration type.	No
Status	Used to indicate the status of the customer registration type. • Active • Inactive	Yes
Access Group	Used to specify the user group that can access the customer registration created using the customer registration type.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The **Search** (🔍) icon appears corresponding to the **Access Group** field. On clicking the **Search** icon, the **Access Group Search** window appears. On specifying the access group, the description of the access group appears corresponding to the **Access Group** field.	
Registration Source	Used to indicate the source through which you want to create the customer registration in the system. The valid values are: • File Upload • Inbound Message • Manual	Yes

6. Enter the required details in the **Main** section.
7. Define additional information about the customer registration type in the **Additional Data** section.
8. Define a list of characteristics for the customer registration type in the **Characteristics** section.
9. Associate customer registration templates with the customer registration type in the **Customer Registration Templates** section
10. Specify the type of information you want to copy while defining a customer registration using an existing *c*ustomer registration in the **Copy Customer Registration Details** section.
11. Click **Save**.
    The customer registration type is defined.

Related Topics

For more information on...	See...
Customer Registration Type screen	Customer Registration Type on page 472
How to define additional data for a customer registration type	Defining Additional Data for a Customer Registration Type on page 483
How to define a characteristic for a customer registration type	Defining a Characteristic for a Customer Registration Type on page 487
How to associate a customer registration template with a customer registration type	Associating a Customer Registration Template with a Customer Registration Type on page 488
How to set an attribute to define a customer registration using the existing customer registration	Setting Attributes to Define a Customer Registration Using the Existing Customer Registration on page 490

Defining Additional Data for a Customer Registration Type

Prerequisites

To define additional data for a customer registration type, you should have:

- Person, account, policy plan, membership, and address business objects defined in the application

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Note: The policy plan and membership business objects are required when you are defining, editing, or copying a customer registration type which is created using the **C1-CustRegTypeHealthCare** business object.

- Approval To Do types and To Do roles defined in the application
- Billing hierarchy and pricing To Do types and To Do roles defined in the application

Note: The billing hierarchy and pricing To Do types and To Do roles are required when you are defining, editing, or copying a customer registration type which is created using the **C1-CustRegTypeHealthCare** business object.

Procedure

To define additional data for a customer registration type:

1. Ensure that the **Additional Data** section is expanded when you are defining, editing, or copying a customer *r*egistration type.

   The **Additional Data** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Approval Required	Used to indicate whether approval is required while creating the customer registration using the customer registration type.	Yes (Conditional) **Note:** This field is required for approving the customer registration which is created using the customer registration type.
Approval To Do Type	Used to indicate the To Do entry of the specified To Do type is created when you submit the customer registration for approval. **Note:** The **Search** (🔍) icon appears corresponding to the **Approval To Do Type** field. On clicking the **Search** icon, the **To Do Type Search** window appears. On specifying the To Do type, the description of the To Do type appears corresponding to the **Approval To Do Type** field. This field appears when the **Approval Required** check box is selected.	Yes (Conditional) **Note:** This field is required for approving the customer registration which is created using the customer registration type.
Approval To Do Role	Used to indicate the users with the specified To Do role can approve, reject, or resubmit the customer registration for approval. **Note:** This field appears when the **Approval Required** check box is selected.	Yes (Conditional) **Note:** This field is required for approving the customer registration which is created using the customer registration type.
Submitter To Do Type	Used to indicate the To Do entry of the specified To Do type is created when the customer registration is resubmitted by the approver.	Yes (Conditional)

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The **Search** (🔍) icon appears corresponding to the **Submitter To Do Type** field. On clicking the **Search** icon, the **To Do Type Search** window appears. On specifying the To Do type, the description of the To Do type appears corresponding to the **Submitter To Do Type** field.	**Note:** This field is required for resubmitting the customer registration for approval.
Submitter To Do Role	Used to indicate the users with the specified To Do role for whom the To Do task is created when the customer registration is resubmitted by the approver.	Yes (Conditional) **Note:** This field is required for resubmitting the customer registration for approval.
Final Approval Required	Used to indicate whether final approval is required once the approver at the first level approves the customer registration. **Note:** This field appears when you are defining, editing, or copying a **Customer Registration Type** using the **C1-CustRegTypeHealthCare** business object. The final approval is required when the **Manual Billing Hierarchy and Pricing** option check box is selected.	Yes (Conditional) **Note:** This field is required for approving the customer registration which is created using the customer registration type.
Final Approval To Do Type	Used to indicate the To Do entry of the specified To Do type is created when you submit the customer registration for final approval. **Note:** The **Search** (🔍) icon appears corresponding to the **Final Approval To Do Type** field. On clicking the **Search** icon, the **To Do Type Search** window appears. On specifying the To Do type, the description of the To Do type appears corresponding to the **Final Approval To Do Type** field. This field appears when the **Final Approval Required** check box is selected.	Yes (Conditional) **Note:** This field is required for final approval of the customer registration.
Final Approval To Do Role	Used to indicate the users with the specified To Do role can only approve or resubmit the customer registration for final approval. **Note:** This field appears when the **Final Approval Required** check box is selected.	Yes (Conditional) **Note:** This field is required for final approval of the customer registration.

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Field Name	Field Description	Mandatory (Yes or No)
Manual Billing Hierarchy and Pricing	Used to indicate whether the required bill groups for the parent customer, the bill group's accounts, pricing rules, bill group sorting information, and bill group derivation and pricing parameters are created manually by the user while defining the customer registration. **Note:** The **Manual Billing Hierarchy and Pricing** option can be used only for customer registrations where the person type is set to **Parent Customer**. This field appears when you are defining, editing, or copying a **Customer Registration Type** using the **C1-CustRegTypeHealthCare** business object.	Yes (Conditional) **Note:** This field is required for creating the billing hierarchy and pricing for the parent customer manually.
Billing Hierarchy and Pricing To Do Type	Used to indicate the To Do entry of the specified To Do type is created for the user to define or edit the billing hierarchy and pricing for the parent customer manually. **Note:** The **Search** (🔍) icon appears corresponding to the **Billing Hierarchy and Pricing To Do Type** field. On clicking the **Search** icon, the **To Do Type Search** window appears. On specifying the To Do type, the description of the To Do type appears corresponding to the **Billing Hierarchy and Pricing To Do Type** field. This field appears when the **Manual Billing Hierarchy and Pricing** check box is selected.	Yes (Conditional) **Note:** This field is required for creating the billing hierarchy and pricing for the parent customer manually.
Billing Hierarchy and Pricing To Do Role	Used to indicate the users with the specified To Do role can only define or edit the billing hierarchy and pricing for the parent customer manually. **Note:** This field appears when the **Manual Billing Hierarchy and Pricing** check box is selected.	Yes (Conditional) **Note:** This field is required for creating the billing hierarchy and pricing for the parent customer manually.
Person Business Object	Used to indicate the business object using which the customer registration for a person is created using the customer registration type.	Yes
Account Business Object	Used to indicate the business object using which the customer registration for an account is created using the customer registration type.	Yes
Policy Plan Business Object	Used to indicate the business object using which the customer registration for a policy plan is created using the customer registration type.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	Note: This field appears when you are defining, editing, or copying a **Customer Registration Type** using the **C1-CustRegTypeHealthCare** business object.	
Membership Business Object	Used to indicate the business object using which the customer registration for a membership is created using the customer registration type. **Note:** The **Membership Business Object** is required for creating customer registrations through an **Inbound Message**. This field appears when you are defining, editing, or copying a **Customer Registration Type** using the **C1-CustRegTypeHealthCare** business object.	Yes
Benefits Business Object	Used to indicate the business object using which the customer registration for a benefit is created using the customer registration type.	No
Address Business Object	Used to indicate the business object using which the customer registration for an address is created using the customer registration type.	Yes
Statement Construct Business Object	Used to indicate the business object using which the customer registration for a statement construct is created using the customer registration type.	Yes

2. Enter the required details in the **Additional Data** section.
3. Click **Save**.
   The additional data for the customer registration type is defined.

Related Topics

For more information on...	See...
How to define a customer registration type	Defining a Customer Registration Type on page 481
How to edit a customer registration type	Editing a Customer Registration Type on page 493
How to copy a customer registration type	Copying a Customer Registration Type on page 495

Defining a Characteristic for a Customer Registration Type

Prerequisites

To define a characteristic for a customer registration type, you should have:

- Characteristic types defined in the application (where the characteristic entity is set to **Customer Registration Type**)

Procedure

To define a characteristic for a customer registration type:

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1. Ensure that the **Characteristics** section is expanded when you are defining, editing, or copying a customer *r*egistration type.

   The **Characteristics** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Characteristic Type	Used to indicate the characteristic type.	Yes (Conditional)
	Note: The list includes only those characteristic types where the characteristic entity is set to **Customer Registration Type**.	**Note:** This field is required when you are defining a characteristic for the customer registration type.
Characteristic Value	Used to specify the value for the characteristic type.	Yes (Conditional)
	Note: If you select a predefined characteristic type, the **Search** (🔍) icon appears corresponding to the **Characteristic Value** field. On clicking the **Search** icon, the **Predefined Characteristic Search** window appears. On specifying the value for a predefined characteristic type, the description of the characteristic value appears corresponding to the **Characteristic Value** field.	**Note:** This field is required when you are defining a characteristic for the customer registration type.

2. Enter the required details in the **Characteristics** section.
3. If you want to define more than one characteristic for the customer registration type, click the **Add** (+) icon *a*nd then repeat step *2*.

   Note: However, if you want to remove a characteristic from the customer registration type, click the **Delete** (🗑) icon corresponding to the characteristic.

4. Click **Save**.
   The characteristic is defined for the customer registration type.

Related Topics

For more information on...	See...
How to define a customer registration type	Defining a Customer Registration Type on page 481
How to edit a customer registration type	Editing a Customer Registration Type on page 493
How to copy a customer registration type	Copying a Customer Registration Type on page 495

Associating a Customer Registration Template with a Customer Registration Type

Prerequisites

To associate a customer registration template with a customer registration type, you should have:

- Template categories defined in the application

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- Customer registration templates associated to the template categories

Procedure

To associate a customer registration template with a customer registration type:

1. Ensure that the **Customer Registration Templates** section is expanded when you are defining, editing, or *c*opying a customer registration type.

   The **Customer Registration Templates** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Sequence	Used to specify the sequence for the customer registration template.	Yes (Conditional) **Note:** This field is required when you are associating a customer registration template with a customer registration type.
Template Category	Used to indicate the category to which the customer registration template belongs. The valid values are: • Person • Account • Policy • Policy Plan **Note:** The **Policy** and **Policy Plan** template categories appear when you are defining, editing, or copying a **Customer Registration Type** using the **C1-CustRegTypeHealthCare** business object. You can associate only one person template category and multiple account, policy, and policy plan template categories with the customer registration type.	Yes (Conditional) **Note:** This field is required when you are associating a customer registration template with a customer registration type.
Template	Used to specify the customer registration template which you want to associate with the customer registration type. **Note:** The **Search** (🔍) icon appears corresponding to the **Template** field. On clicking the **Search** icon, the **Customer Registration Template Search** window appears. On specifying the template, the description of the template appears corresponding to the **Template** field.	Yes (Conditional) **Note:** This field is required when you are associating a customer registration template with a customer registration type.

2. Enter the required details in the **Customer Registration Templates** section.

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3. If you want to define more than one template for the customer registration type, click the **Add** (+) icon and *t*hen repeat step *2*.

> **Note:** However, if you want to remove a template from the customer registration type, click the **Delete** (🗑) icon corresponding to the customer registration template.

4. Click **Save**.
   The customer registration template is associated with the customer registration type.

Related Topics

For more information on...	See...
How to define a customer registration type	Defining a Customer Registration Type on page 481
How to edit a customer registration type	Editing a Customer Registration Type on page 493
How to copy a customer registration type	Copying a Customer Registration Type on page 495

Setting Attributes to Define a Customer Registration Using the Existing Customer Registration

Prerequisites

To set an attribute for defining a customer registration using the existing customer registration, you should have:

- **Person** attributes defined in the application
- **Account** attributes defined in the application
- **Policy** attributes defined in the application

> **Note:** The **Policy** attributes are required when you are defining a customer registration type using the **C1-CustRegTypeHealthCare** business object.

- **Policy Plan** attributes defined in the application

> **Note:** The **Policy Plan** attributes are required when you are defining a customer registration type using the **C1-CustRegTypeHealthCare** business object.

Procedure

To set an attribute for defining a customer registration using the existing customer registration:

1. Ensure that the **Copy Customer Registration Details** section is expanded when you are defining, editing, or *c*opying a customer registration type.

   The **Copy Customer Registration Details** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Person Names	Used to indicate whether you want to copy the person details while copying a customer registration.	No
Accounts	Used to indicate whether you want to copy the account details while copying a customer registration.	No
Person Identifiers	Used to indicate whether you want to copy the person identifier details while copying a customer registration.	No

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Field Name	Field Description	Mandatory (Yes or No)
Account Identifiers	Used to indicate whether you want to copy the account identifier details while copying a customer registration. **Note:** The check box of this field is enabled when the **Accounts** check box is selected in the **Copy Customer Registration Details** section.	No
Person Phones	Used to indicate whether you want to copy the phone details of the person while copying a customer registration.	No
Account Characteristics	Used to indicate whether you want to copy the characteristic details of the account while copying a customer registration. **Note:** The check box of this field is enabled when the **Accounts** check box is selected in the **Copy Customer Registration Details** section.	No
Person Characteristics	Used to indicate whether you want to copy the characteristic details of the person while copying a customer registration.	No
Account Auto pay Information	Used to indicate whether you want to copy the automatic payment details of the account while copying a customer registration. **Note:** The check box of this field is enabled when the **Accounts** check box is selected in the **Copy Customer Registration Details** section.	No
Person Addresses	Used to indicate whether you want to copy the address details of the person while copying a customer registration.	No
Account Persons	Used to indicate whether you want to copy the details of the persons related to the account while copying a customer registration. **Note:** The check box of this field is enabled when the **Accounts** check box is selected in the **Copy Customer Registration Details** section.	No
Person Hierarchy	Used to indicate whether you want to copy the person hierarchy details while copying a customer registration.	No
Account Override Address	Used to indicate whether you want to copy the account override address details while copying a customer registration. **Note:** The check box of this field is enabled when the **Accounts** check box is selected in the **Copy Customer Registration Details** section.	No

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Field Name	Field Description	Mandatory (Yes or No)
Bill Routing Information	Used to indicate whether you want to copy the bill routing details of the account while copying a customer registration. **Note:** The check box of this field is enabled when the **Accounts** check box is selected in the **Copy Customer Registration Details** section.	No
Credit Rating History	Used to indicate whether you want to copy the credit rating history details while copying a customer registration. **Note:** The check box of this field is enabled when the **Accounts** check box is selected in the **Copy Customer Registration Details** section.	No
Policies	Used to indicate whether you want to copy the policy details while copying a customer registration. **Note:** This field appears only when you are defining, editing, or copying a **Customer Registration Type** using the **C1-CustRegTypeHealthCare** business object.	No
Policy Plans	Used to indicate whether you want to copy the policy plan details while copying a customer registration. **Note:** This field appears when you are defining, editing, or copying a **Customer Registration Type** using the **C1-CustRegTypeHealthCare** business object. The check box of this field is enabled only when the **Policies** check box is selected in the **Copy Customer Registration Details** section.	No
Policy Characteristics	Used to indicate whether you want to copy the policy characteristic details while copying a customer registration. **Note:** This field appears when you are defining, editing, or copying a **Customer Registration Type** using the **C1-CustRegTypeHealthCare** business object. The check box of this field is enabled only when the **Policies** check box is selected in the **Copy Customer Registration Details** section.	No

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Field Name	Field Description	Mandatory (Yes or No)
Policy Plan Characteristics	Used to indicate whether you want to copy the policy plan characteristic details while copying a customer registration. **Note:** This field appears when you are defining, editing, or copying a **Customer Registration Type** using the **C1-CustRegTypeHealthCare** business object. The check box of this field is enabled when the **Policy Plans** check box is selected in the **Copy Customer Registration Details** section.	No

2. Select the required attributes in the **Copy Customer Registration Details** section.
3. Click **Save**.
   The attributes are set for defining a customer registration using the existing customer registration.

Related Topics

For more information on...	See...
How to define a customer registration type	Defining a Customer Registration Type on page 481
How to edit a customer registration type	Editing a Customer Registration Type on page 493
How to copy a customer registration type	Copying a Customer Registration Type on page 495

Editing a Customer Registration Type

Prerequisites

To edit a customer registration type, you should have:

- Customer registration business objects defined in the application
- Access groups defined in the application
- Registration sources defined in the application
- Statement construct business object defined in the application
- Benefit business object defined in the application
- Person, account, policy plan, membership, and address business objects defined in the application

> **Note:** The policy plan and membership business objects are required when you are editing a customer registration type which is created using the **C1-CustRegTypeHealthCare** business object.

- Approval To Do types and To Do roles defined in the application
- Billing hierarchy and pricing To Do types and To Do roles defined in the application

> **Note:** The billing hierarchy and pricing To Do types and To Do roles are required when you are editing a customer registration type which is created using the **C1-CustRegTypeHealthCare** business object.

- Characteristic types defined in the application
- Template categories defined in the application

Procedure

To edit a customer registration type:

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1. Search for the customer registration type in the **Customer Registration Type List** zone of the **Customer Registration Type** screen.
2. In the **Search Results** section, click the **Edit** (✎) icon in the **Edit** column corresponding to the customer *r*egistration type whose details you want to edit.

   The **Customer Registration Type** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details about the customer registration type.
   - **Additional Data** - Used to define additional information about the customer registration type.
   - **Characteristics** - Used to define a list characteristics for the customer registration type.
   - **Customer Registration Templates** - Used to associate templates with the customer registration type.
   - **Copy Customer Registration Details** - Used to specify the type of information you want to copy while defining a customer registration using an existing customer registration.

   - **Main** - The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Customer Registration Type	Displays the customer registration type.	Not applicable
Business Object	Indicates the business object using which the customer registration type is created in the system.	Not applicable
Description	Used to specify the description for the customer registration type.	Yes
Customer Registration Business Object	Used to indicate the business object using which you want to create the customer registration in the system.	Yes
Detailed Description	Used to specify additional information about the customer registration type.	No
Status	Used to indicate the status of the customer registration type. • Active • Inactive	Yes
Access Group	Used to specify the user group that can access the customer registration created using the customer registration type. **Note:** The **Search** (🔍) icon appears corresponding to the **Access Group** field. On clicking the **Search** icon, the **Access Group Search** window appears. On specifying the access group, the description of the access group appears corresponding to the **Access Group** field.	Yes
Registration Source	Used to indicate the source through which you want to create the customer registration in the system. The valid values are: • File Upload • Inbound Message	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	• Manual	

Tip: Alternatively, you can edit the details of a customer registration type by clicking the **Edit** button in the **Customer Registration Type** zone.

3. Modify the required details in the **Main** section, if required.
4. Modify additional information about the customer registration type in the **Additional Data** section, if required.
5. Define, edit, or remove characteristics of the customer registration type in the **Characteristics** section, if required.
6. Associate or disassociate customer registration templates from the customer registration type in the **Customer Registration Templates** section, if required.
7. Specify the type of information you want to copy while defining a customer registration using an existing *c*ustomer registration in the **Copy Customer Registration Details** section, if required.
8. Click **Save**.
   The changes made to the customer registration type are saved.

Related Topics

For more information on...	See...
How to search for a customer registration type	Searching for a Customer Registration Type on page 480
Customer Registration Type List zone	Customer Registration Type List on page 473
Customer Registration Type screen	Customer Registration Type on page 472
Customer Registration Type zone	Customer Registration Type on page 474
How to define additional data for a customer registration type	Defining Additional Data for a Customer Registration Type on page 483
How to define a characteristic for a customer registration type	Defining a Characteristic for a Customer Registration Type on page 487
How to associate a customer registration template with a customer registration type	Associating a Customer Registration Template with a Customer Registration Type on page 488
How to set an attribute to define a customer registration using the existing customer registration	Setting Attributes to Define a Customer Registration Using the Existing Customer Registration on page 490

Copying a Customer Registration Type

Instead of creating a customer registration type from scratch, you can create a new customer registration type using an existing customer registration type. This is possible through copying a customer registration type. On copying a customer registration type, the details including the additional data, characteristics, customer registration templates, and attributes set to define a customer registration from the existing customer registration are copied to the new customer registration type. You can then edit the details, if required.

Prerequisites

To copy a customer registration type, you should have:

- Customer registration type (whose copy you want to create) defined in the application
- Customer registration business objects defined in the application
- Access groups defined in the application
- Registration sources defined in the application
- Statement construct business object defined in the application

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- Benefit business object defined in the application
- Person, account, policy plan, membership, and address business objects defined in the application

> **Note:** The policy plan and membership business objects are required when you are copying a customer registration type which is created using the **C1-CustRegTypeHealthCare** business object.

- Approval To Do types and To Do roles defined in the application
- Billing hierarchy and pricing To Do types and To Do roles defined in the application

> **Note:** The billing hierarchy and pricing To Do types and To Do roles are required when you are copying a customer registration type which is created using the **C1-CustRegTypeHealthCare** business object.

- Characteristic types defined in the application
- Template categories defined in the application

Procedure

To copy a customer registration type:

1. Search for a customer registration type in the **Customer Registration Type List** zone of the **Customer Registration Type** screen.
2. In the **Search Results** section, click the **Duplicate** (⧉) icon in the **Duplicate** column corresponding to the *c*ustomer registration type whose copy you want to create.

   The **Customer Registration Type** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details about the customer registration type.
   - **Additional Data** - Used to define additional information about the customer registration type.
   - **Characteristics** - Used to define a list characteristics for the customer registration type.
   - **Customer Registration Templates** - Used to associate templates with the customer registration type.
   - **Copy Customer Registration Details** - Used to specify the type of information you want to copy while defining a customer registration using an existing customer registration.

   - **Main** - The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Customer Registration Type	Used to specify the customer registration type.	Yes
Business Object	Indicates the business object using which you want to create the customer registration type.	Not applicable
Description	Used to specify the description for the customer registration type.	Yes
Customer Registration Business Object	Used to indicate the business object using which you want to create the customer registration in the system.	Yes
Detailed Description	Used to specify additional information about the customer registration type.	No
Status	Used to indicate the status of the customer registration type. • Active • Inactive	Yes
Access Group	Used to specify the user group that can access the customer registration created using the customer registration type.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The **Search** (🔍) icon appears corresponding to the **Access Group** field. On clicking the **Search** icon, the **Access Group Search** window appears. On specifying the access group, the description of the access group appears corresponding to the **Access Group** field.	
Registration Source	Used to indicate the source through which you want to create the customer registration in the system. The valid values are: • File Upload • Inbound Message • Manual	Yes

Tip: Alternatively, you can copy a customer registration type by clicking the **Duplicate** button in the **Customer Registration Type** zone.

3. Enter the required details in the **Main** section.
4. Enter additional information about the customer registration type in the **Additional Data** section.
5. Define, edit, or remove characteristics of the customer registration type in the **Characteristics** section.
6. Associate or disassociate customer registration templates from the customer registration type in the **Customer Registration Templates** section.
7. Specify the type of information you want to copy while defining a customer registration using an existing *c*ustomer registration in the **Copy Customer Registration Details** section.
8. Click **Save**.
   The new customer registration type is defined.

Related Topics

For more information on...	See...
How to search for a customer registration type	Searching for a Customer Registration Type on page 480
Customer Registration Type List zone	Customer Registration Type List on page 473
Customer Registration Type screen	Customer Registration Type on page 472
Customer Registration Type zone	Customer Registration Type on page 474
How to define additional data for a customer registration type	Defining Additional Data for a Customer Registration Type on page 483
How to define a characteristic for a customer registration type	Defining a Characteristic for a Customer Registration Type on page 487
How to associate a customer registration template with a customer registration type	Associating a Customer Registration Template with a Customer Registration Type on page 488
How to set an attribute to define a customer registration using the existing customer registration	Setting Attributes to Define a Customer Registration Using the Existing Customer Registration on page 490

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Deleting a Customer Registration Type

Procedure

To delete a Customer Registration Type:

1. Search for the customer registration type in the **Customer Registration Type List** zone of the **Customer Registration Type** screen.
2. In the **Customer Registration Type List** zone, click the **Delete** (🗑) icon in the **Delete** column corresponding *t*o the customer registration type that you want to delete.

   A message appears confirming whether you want to delete the customer registration type.
3. Click **OK**.
   The customer registration type is deleted.

> **Note:** You can delete a customer registration type when a customer registration is not yet defined using the customer registration type.

> **Tip:** Alternatively, you can delete a customer registration type by clicking the **Delete** button in the **Customer Registration Type** zone.

Related Topics

For more information on...	**See...**
How to search for a customer registration type	Searching for a Customer Registration on page 507
Customer Registration Type List zone	Customer Registration Type List on page 473
Customer Registration Type screen	Customer Registration Type on page 472
Customer Registration Type zone	Customer Registration Type on page 474

Viewing the Customer Registration Type Details

Procedure

To view the details of a customer registration type:

1. Search for the customer registration type in the **Customer Registration Type List** zone of the **Customer Registration Type** screen.
2. In the **Search Results** section, click the **Broadcast** (📡) icon corresponding to the customer registration type *w*hose details you want to view.
   The **Customer Registration Type** zone appears.
3. View the details of the customer registration type in the **Customer Registration Type** zone.

Related Topics

For more information on...	**See...**
How to search for a customer registration type	Searching for a Customer Registration on page 507
Customer Registration Type List zone	Customer Registration Type List on page 473
Customer Registration Type screen	Customer Registration Type on page 472
Customer Registration Type zone	Customer Registration Type on page 474

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Customer Registration (Used for Searching)

The **Customer Registration** screen allows you to search for a customer registration using various search criteria. It contains the following zone:

- Search Customer Registration on page 499

For more information on...	See...
How to search for a customer registration	Searching for a Customer Registration on page 507
How to view the details of a customer registration	Viewing the Customer Registration Details on page 509
How to define a customer registration	Defining a Customer Registration on page 509
How to copy a customer registration	Copying a Customer Registration on page 552

Search Customer Registration

The **Search Customer Registration** zone allows you to search for a customer registration using various search criteria. It contains the following two sections:

- **Search Criteria** - The **Search Criteria** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Search By	Used to indicate whether you want to search for a customer registration using the customer registration details. The valid values are: • Registration Details **Note:** This option appears when you have access to the **C1CREGSR** application service. • Person Details **Note:** This option appears when you have access to the **C1CREGSR** application service. • Inbound Message Details **Note:** This option appears when you have access to the **C1CTRGHC** application service. • File Upload Details **Note:** This option appears when you have access to the **C1CREGSR** application service. **Note:** By default, the **Registration Details** option is selected.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
Customer Registration ID	Used to search for a particular customer registration. **Note:** This field appears when you select the **Registration Details** option from the **Search By** list.	Yes (Conditional) **Note:** This field is required for searching customer registrations using the customer registration details.
Created From	Used to search customer registrations which are created from a particular date onwards. **Note:** This field appears when you select the **Registration Details** or **Inbound Message Details** options from the **Search By** list.	Yes (Conditional) **Note:** This field is required for searching customer registrations using the customer registration or inbound message details.
User ID	Used to search customer registration of a particular user. **Note:** The **Search** (🔍) icon appears corresponding to the **User ID** field. On clicking the **Search** icon, the **User Search** window appears where you can search for a particular user. This field appears when you select the **Registration Details** or **Inbound Message Details** options from the **Search By** list.	Yes (Conditional) **Note:** This field is required for searching customer registrations using the customer registration or inbound message details.
Created To	Used to search customer registrations which are created till a particular date. **Note:** This field appears when you select the **Registration Details** or **Inbound Message Details** options from the **Search By** list.	Yes (Conditional) **Note:** This field is required for searching customer registrations using the customer registration or inbound message details.
Status	Used to search customer registrations with a particular status. The valid values are: • Approval In Progress • Bill Group Approved • Complete • Draft • Draft for Update • Parent Customer Approved • Pending Final Approval • Pending Pricing Correction • Rejected **Note:** The values listed above appear when the **Registration Details** option is selected from the **Search By** list.	Yes (Conditional) **Note:** This field is required for searching customer registrations using the customer registration or inbound message details.

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Field Name	Field Description	Mandatory (Yes or No)
	• Pending • Processed • Rejected • Voided **Note:** These values listed above appear when the **Inbound Message Details** option is selected from the **Search By** list. **Note:** The **Status** field appears when you select the **Registration Details** or **Inbound Message Details** options from the **Search By** list.	
Customer Registration Type	Used to search customer registrations which are created using a particular customer registration type. **Note:** This field appears only when the **Registration Details** option is selected from the **Search By** list.	Yes (Conditional) **Note:** This field is required for searching customer registrations using the customer registration details.
Division	Used to search customer registrations which belong to a particular division. **Note:** This field appears when the **Person Details** option is selected from the **Search By** list. You can view only those divisions to which you have access in the **Division** list.	Yes (Conditional) **Note:** This field is required for searching customer registrations using the person details.
Person Name	Used to search customer registrations of persons with a particular name. **Note:** This field appears when the **Person Details** option is selected from the **Search By** list and the **Advanced Search** link available in the upper right corner of the **Search Customer Registration** zone is clicked.	Yes (Conditional) **Note:** This field is required for searching customer registrations using the person details.
Person Type	Used to search customer registrations of persons which belong to a particular person type. The valid values are: • Bill Group • Broker • Business • Group • Parent Customer • Person	Yes (Conditional) **Note:** This field is required for searching customer registrations using the person details.

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Field Name	Field Description	Mandatory (Yes or No)
	Note: This field appears when the **Person Details** option is selected from the **Search By** list and the **Advanced Search** link available in the upper right corner of the **Search Customer Registration** zone is clicked.	
Address	Used to search customer registrations of persons from a particular address. **Note:** This field appears when the **Person Details** option is selected from the **Search By** list and the **Advanced Search** link available in the upper right corner of the **Search Customer Registration** zone is clicked.	Yes (Conditional) **Note:** This field is required for searching customer registrations using the person details.
City	Used to search customer registrations from a particular city. **Note:** This field appears when the **Person Details** option is selected from the **Search By** list and the **Advanced Search** link available in the upper right corner of the **Search Customer Registration** zone is clicked.	Yes (Conditional) **Note:** This field is required for searching customer registrations using the person details.
Phone Number	Used to search for a customer registration of a person having a particular phone number. **Note:** This field appears when the **Person Details** option is selected from the **Search By** list and the **Advanced Search** link available in the upper right corner of the **Search Customer Registration** zone is clicked.	Yes (Conditional) **Note:** This field is required for searching customer registrations using the person details.
Person ID	Used to search customer registration of a particular person. **Note:** This field appears when the **Person Details** option is selected from the **Search By** list.	Yes (Conditional) **Note:** This field is required for searching customer registrations using the person details.
Person Identifier Type	Used to indicate the person identifier type using which you want to search for customer registrations. **Note:** This field appears when the **Person Details** option is selected from the **Search By** list.	Yes (Conditional) **Note:** If you enter the person identifier as a search criteria, you have to select the person identifier type. This field is required for searching customer registrations using the person details.

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Field Name	Field Description	Mandatory (Yes or No)
Person Identifier	Used to specify the value of the person identifier type using which you want to search for customer registrations. **Note:** This field appears when the **Person Details** option is selected from the **Search By** list.	Yes (Conditional) **Note:** If you specify the person identifier type as a search criteria, you have to enter the person identifier. This field is required for searching customer registrations using the person details.
Characteristic Type	Used to search customer registrations of persons with a particular characteristic type. **Note:** The list includes only those characteristic types where the characteristic entity is set to **Customer Registration**. This field appears when the **Person Details** option is selected from the **Search By** list and the **Advanced Search** link available in the upper right corner of the **Search Customer Registration** zone is clicked.	Yes (Conditional) **Note:** This field is required for searching customer registrations using the person details.
Characteristic Value	Used to specify the value of the characteristic type using which you want to search customer registrations of persons. **Note:** If you select a predefined characteristic type, the **Search** (🔍) icon appears corresponding to the **Characteristic Value** field. On clicking the **Search** icon, the **Predefined Characteristic Search** window appears. On specifying the value for a predefined characteristic type, the description of the characteristic value appears corresponding to the **Characteristic Value** field. This field appears when the **Person Details** option is selected from the **Search By** list and the **Advanced Search** link available in the upper right corner of the **Search Customer Registration** zone is clicked.	Yes (Conditional) **Note:** This field is required for searching customer registrations using the person details.
Inbound Message ID	Used to search for a customer registration which was created through a particular inbound message.	Yes (Conditional)

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Field Name	Field Description	Mandatory (Yes or No)
	Note: This field appears only when the **Inbound Message Details** option is selected from the **Search By** list.	**Note:** This field is required for searching customer registrations using the inbound message details.
Source System	Used to search customer registrations whose information is received from a particular external system. **Note:** This field appears when the **Inbound Message Details** option is selected from the **Search By** list.	Yes (Conditional) **Note:** This field is required for searching customer registrations using the inbound message details.
External Source ID	Used to search for a customer registrations whose information is received from a particular external source system. **Note:** This field appears when the **Inbound Message Details** option is selected from the **Search By** list.	Yes (Conditional) **Note:** This field is required for searching customer registrations using the inbound message details.
External Transaction ID	Used to search for a customer registration which is created as a result of a particular transaction in the external source system. **Note:** This field appears when the **Inbound Message Details** option is selected from the **Search By** list.	Yes (Conditional) **Note:** This field is required for searching customer registrations using the inbound message details.
External Batch ID	Used to search customer registrations which are created through an external batch job. **Note:** This field appears when the **Inbound Message Details** option is selected from the **Search By** list.	Yes (Conditional) **Note:** This field is required for searching customer registrations using the inbound message details.
Inbound Message Type	Used to search customer registrations which are created using a particular inbound message type. **Note:** This field appears when the **Inbound Message Details** option is selected from the **Search By** list.	Yes (Conditional) **Note:** This field is required for searching customer registrations using the inbound message details.
Request Id	Used to search customer registrations which are created from a particular file uploaded through the **File Upload Interface** utility. **Note:** This field appears when the **File Upload Details** option is selected from the **Search By** list.	Yes (Conditional) **Note:** This field is required for searching customer registrations using the file upload details.
File Name	Used to search customer registrations created from uploading a file with a particular name.	Yes (Conditional)

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Field Name	Field Description	Mandatory (Yes or No)
	Note: This field appears when the **File Upload Details** option is selected from the **Search By** list.	**Note:** This field is required for searching customer registrations using the file upload details.
File Status	Used to search customer registrations created from the uploaded files having a particular status. The valid values are: • Approval Pending • Completed • Error • Pending • Rejected **Note:** This field appears when the **File Upload Details** option is selected from the **Search By** list.	Yes (Conditional) **Note:** This field is required for searching customer registrations using the file upload details.
File Request Type	Used to search customer registrations which are created from the uploaded files with a particular file request type. **Note:** This field appears when the **File Upload Details** option is selected from the **Search By** list.	Yes (Conditional) **Note:** This field is required for searching customer registrations using the file upload details.

Note: You must specify at least one search criterion while searching for a customer registration. One more search criterion is required when you are searching for a customer registration using the division and/or person type.

- **Search Results** - On clicking the **Search** button, the search results appear based on the specified search criteria. The **Search Results** section contains the following columns:

Column Name	Column Description
Creation Date Time	Displays the date and time when the customer registration is created in the system.
Customer Registration Information	Displays the concatenated string of information about the customer registration. **Note:** It has a link. On clicking the link, the **Customer Registration** screen appears where you can view the details of the respective customer registration.
Status	Indicates the status of the customer registration. The valid values are: • Approval In Progress • Bill Group Approved • Complete • Draft • Draft for Update • Parent Customer Approved • Pending Final Approval • Pending Pricing Correction • Rejected

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Column Name	Column Description
	Note: The values listed above appear when the **Registration Details** option is selected from the **Search By** list.
	• Pending • Processed • Rejected • Voided
	Note: These values listed above appear when the **Inbound Message Details** option is selected from the **Search By** list.
	Note: This column appears only when the **Registration Details**, **Person Details**, or **Inbound Message Details** options are selected from the **Search By** list.
Request Id	Displays the request Id generated while uploading a file through the **File Upload Interface** utility for creating the customer registration object.
	Note: This column appears when the **File Upload Details** option is selected from the **Search By** list.
Created By	Displays the user who has created the customer registration.
	Note: This column appears when the **Registration Details**, **Person Details**, or **Inbound Message Details** options are selected from the **Search By** list.
Inbound Message Information	Displays the concatenated string of information about the inbound message.
	Note: It has a link. On clicking the link, the **Inbound Message** screen appears where you can view the details of the respective inbound message. This column appears when the **Inbound Message Details** option is selected from the **Search By** list.
File ID	Displays the file which is uploaded for creating the customer registration through the **File Upload Interface** utility.
	Note: This column appears when the **File Upload Details** option is selected from the **Search By** list.
Copy	On clicking the **Copy** (⧉) icon, the **Customer Registration** screen appears where you can define a new customer registration using an existing customer registration.
	Note: This column appears when the **Registration Details** option is selected from the **Search By** list.
Person Name	Displays the name of the person for whom the customer registration is defined in the system.
	Note: This column appears when the **Person Details** option is selected from the **Search By** list.

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Column Name	Column Description
Inbound Message Type	Indicates the inbound message type using which the inbound message is created in the system. **Note:** This column appears when the **Inbound Message Details** option is selected from the **Search By** list.
File Name	Displays the name of the file which is uploaded for creating the customer registration through the **File Upload Interface** utility. **Note:** This column appears when the **File Upload Details** option is selected from the **Search By** list.
Primary Person Identifier Type	Indicates the primary identifier type associated with the person. **Note:** This column appears when the **Person Details** option is selected from the **Search By** list.
Source System	Indicates the source system from where the inbound message is received for creating the customer registration. **Note:** This column appears when the **Inbound Message Details** option is selected from the **Search By** list.
Request Type	Indicates the request type using which the file is uploaded through the **File Upload Interface** utility for creating the customer registration. **Note:** This column appears only when the **File Upload Details** option is selected from the **Search By** list.
Primary Person Identifier	Displays the primary person identifier. **Note:** This column appears when the **Person Details** option is selected from the **Search By** list.

Note: Pagination is used to display limited number of records in the **Search Results** section. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

Related Topics

For more information on...	See...
How to search for a customer registration	Searching for a Customer Registration on page 507
Customer Registration screen	Customer Registration (Used for Searching) on page 499

Searching for a Customer Registration

Prerequisites

To search for a customer registration, you should have:

- Customer registration business objects defined in the application
- Customer registration statuses and customer registration types defined in the application

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- Divisions associated with the access group to which the user belongs
- Person types and person identifier types defined in the application
- Characteristic types defined in the application (where the characteristic entity is set to **Customer Registration**)
- Inbound message statuses, inbound message types, and source systems defined in the application.
- File statuses and file request types defined in the application.

Procedure

To search for a customer registration:

1. Click the **Menu** link in the **Application** toolbar.
   A list appears.
2. From the **Main** menu, select **Customer Management** and then click **Customer Registration**.
   A sub-menu appears.
3. Click the **Search** option from the **Customer Registration** sub-menu.
   The **Customer Registration** screen appears.
4. Enter the search criteria in the **Search Customer Registration** zone.

> **Note:**
>
> You must specify at least one search criterion while searching for a customer registration object. One more search criterion is required when you are searching for a customer registration using the division and/or person type.
>
> The criteria are grouped as indicated by line separators between the criteria. Each group is independent from the other, and only one group is used at a time for searching. If you enter criteria in more than one group, the criteria from the former group is used for searching. For example, if you enter the person name (in the second criteria group) and person identifier (in the fourth criteria group), the system searches using the person name instead of the person identifier.
>
> You must specify the division when you are searching for a customer registration of a person using the city.
>
> You must specify division and/or any other criteria in the second group when you are searching for a customer registration using the person type.
>
> If you have specified any other search criterion along with the person ID, the system ignores the additional search criterion and searches for the customer registration using the person ID.
>
> ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.
>
> The **Advanced Search** link appears in the right side of the **Search Customer Registration** zone. On clicking the **Advanced Search** link, additional fields appear in the zone which help you to refine the search.
>
> If you select a predefined characteristic type, the **Search** (🔍) icon appears corresponding to the **Characteristic Value** field. On clicking the **Search** icon, you can search for a predefined characteristic value.

5. Click **Search**.
   A list of customer registrations that meet the search criteria appears in the **Search Results** section.

Related Topics

For more information on...	See...
Customer Registration screen	Customer Registration (Used for Viewing) on page 559
Customer Registration zone	Customer Registration on page 561

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Viewing the Customer Registration Details

Procedure

To view the details of a customer registration:

1. Search for the customer registration in the **Customer Registration** screen.
2. In the **Search Results** section, click the link in the **Customer Registration Information** column corresponding *t*o the customer registration whose details you want to view:
   The **Customer Registration** screen appears.
3. Ensure that the **Main** tab is selected.
4. View the details of the customer registration in the **Customer Registration** zone.

Related Topics

For more information on...	See...
How to search for a customer registration	Searching for a Customer Registration on page 507
Customer Registration screen	Customer Registration (Used for Viewing) on page 559
Customer Registration zone	Customer Registration on page 561

Defining a Customer Registration

Prerequisites

To define a customer registration, you should have:

- Customer registration types, source systems, and person types defined in the application
- Divisions, customer segments, customer tiers, and access groups defined in the application
- Name types, phone types, and person identifier types defined in the application
- Address type codes and countries defined in the application
- Characteristic types defined in the application (where the characteristic entity is set to **Customer Registration**)
- Relationship types defined in the application
- Policy types and policy person roles defined in the application.

> **Note:** These prerequisites are required when you are defining a customer registration using the **C1-CustomerRegistrationHC** business object.

Procedure

To define a customer registration:

1. Click the **Menu** link in the **Application** toolbar.
   A list appears.
2. From the **Main** menu, select **Customer Management** and then click **Customer Registration**.
   A sub-menu appears.
3. Click the **Add** option from the **Customer Registration** sub-menu.

   The **Add Customer Registration** screen appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Customer Registration Type	Used to indicate the customer registration type using which you want to define the customer registration.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
Source System	Used to indicate the external system from where the customer registration information is received.	No
Person Type	Used to indicate the type of person for whom you want to define the customer registration.	Yes

Tip: Alternatively, you can access the **Add Customer Registration** screen by clicking the **Add** button in the **Page Title** area of the **Customer Registration** screen.

4. Select the required **Customer Registration Type** from the respective field.
5. Select the required **Source System** from the respective field, if required.
6. Select the required **Person Type** from the respective field.
7. Click **OK**.

The **Customer Registration** screen appears. It contains the following pages:

- **Main** - Used to specify basic information about the person.
- **Contact** - Used to specify the contact information about the person.
- **Person Characteristics** - Used to define a list of characteristics for the person.
- **Hierarchy** - Used to define the person to person relationship for the person
- **Accounts** - Used to add the account details of the person.
- **Policies** - Used to specify the policy details of the person.

Note: This page appears when you are defining a customer registration using the **C1-CustomerRegistrationHC** business object.

- **Registration Characteristics** - Used to define a list of characteristics for the customer registration.

The **Main** page contains the following sections:

- **Main** - Used to specify basic details about the person.
- **Person Name** - Used to add the person names for customer registration.
- **Person Phones** - Used to add the person phone details for customer registration.
- **Person IDs** - Used to add the person identifiers for customer registration.

The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Person Type	Indicates the person type using which you want to define the customer registration for the person.	Not applicable
Date of Birth	Used to specify the date when the person was born.	Yes
Division	Used to indicate the division to which the person belongs. **Note:** You can view only those divisions to which you have access in the **Division** list.	Yes
Person Since Date	Used to specify the date from when the person is the main customer.	Yes
Customer Segment	Used to indicate the market segment to which the person belongs.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	Note: This field appears when you are defining a customer registration using the **C1-CustomerRegistrationBanking** business object.	
Customer Tier	Used to indicate the tier of the customer segment to which the person belongs. **Note:** This field appears when you are defining a customer registration using the **C1-CustomerRegistrationBanking** business object.	Yes
Access Group	Used to indicate the user group that can access the customer registration. **Note:** The **Search** (🔍) icon appears corresponding to the **Access Group** field. On clicking the **Search** icon, the **Access Group Search** window appears. On specifying the access group, the description of the access group appears corresponding to the **Access Group** field.	Yes
Immediate Refund	Used to indicate whether you want to initiate immediate refund for the person's accounts and its child persons' accounts.	No

8. Enter the required details in the **Main** section.
9. Add the names of the person in the **Person Names** section.
10. Add the phone details for the person in the **Person Phones** section.
11. Add the identifier details for the person in the **Person IDs** section.
12. Define the addresses of the person in the **Contact** page, if required.
13. Define a list of characteristics for the person in the **Person Characteristics** page, if required.
14. Define the person to person relationship for the person in the **Hierarchy** page, if required.
15. Add the account details of the person in the **Accounts** page, if required.
16. Add the policy details of the person in the **Policies** page, if required.

Note: This page appears when you are defining a customer registration using the **C1-CustomerRegistrationHC** business object.

17. Define a list of characteristics for the customer registration in the **Registration Characteristics** page, if *r*equired.
18. Click **Validate and Save**.
    The customer registration is defined.

Related Topics

For more information on...	See...
Customer Registration screen	Customer Registration (Used for Viewing) on page 559

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For more information on...	See...
How to add name of a person for customer registration	Adding the Names of a Person on page 512
How to add the phone details of a person for customer registration	Adding the Phone Details of a Person on page 513
How to add the identifier details of a person for customer registration	Adding the Identifier Details of a Person on page 514
How to add the contact details of a person for customer registration	Adding the Contact Details of a Person on page 515
How to define a characteristic for a person	Defining a Characteristic for a Person on page 518
How to define the hierarchy of a person	Defining a Person to Person Relationship for a Person on page 519
How to add an account for a person	Adding an Account for a Person on page 522
How to add a policy for a person	Defining a Policy on page 536
How to define a characteristic for a customer registration	Defining a Characteristic for a Customer Registration on page 546

Adding the Names of a Person

Prerequisites

To add the names of a person, you should have:

- Name types defined in the application.

Procedure

To add the names of a person:

1. Ensure that the **Person Names** section is expanded in the **Main** page when you are defining, editing, or copying *a* customer registration.

   The **Person Names** section contains the following columns:

Column Name	Column Description	Mandatory (Yes or No)
Name Type	Used to indicate the type of name which you want to add for the customer registration. **Note:** The list includes only those name types where the name type entity is set to **Customer Registration**.	Yes (Conditional) **Note:** This field is required when you are adding a name for customer registration.
Name	Used to specify the name of the person.	Yes (Conditional) **Note:** This field is required when you are adding a name for customer registration.

2. Enter the required details in the **Person Names** section.
3. If you want to add more than one person name for the customer registration, click the **Add** (+) icon and then *r*epeat step *2*.

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> **Note:** However, if you want to remove a person name from the customer registration, click the **Delete** (🗑) icon corresponding to the person name.

4. Click **Validate and Save**.
   The names are added for the person.

Related Topics

For more information on...	See...
How to define a customer registration	Defining a Customer Registration on page 509
How to edit a customer registration	Editing the Customer Registration Details on page 577
How to copy a customer registration	Copying a Customer Registration on page 552

Adding the Phone Details of a Person

Prerequisites

To add the phone details of a person, you should have:

- Phone types defined in the application.

Procedure

To add the phone details of a person:

1. Ensure that the **Person Phones** section is expanded in the **Main** page when you are defining, editing, or *c*opying a customer registration.

   The **Person Phones** section contains the following columns:

Column Name	Column Description	Mandatory (Yes or No)
Phone Type	Used to indicate the type of the phone which you want to add for the person. The valid values are: • Business • Business Phone • Fax • Home • Mobile **Note:** The list includes only those phone types where the phone type entity is set to **Customer Registration**.	Yes (Conditional) **Note:** This field is required when you are adding the phone details of a person.
Phone Number	Used to specify the phone number.	Yes (Conditional) **Note:** This field is required when you are adding the phone details of a person.
Extension	Used to specify the extension value of the phone number.	Yes (Conditional)

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Column Name	Column Description	Mandatory (Yes or No)
		Note: This field is required when you are adding the phone details of a person.
Phone Format	Displays the format in which the phone number is specified for the person.	Not applicable

2. Enter the required details in the **Person Phones** section.
3. If you want to add more than one person phone for the customer registration, click the **Add** (+) icon and then *r*epeat step *2*.

Note: However, if you want to remove a person phone from the customer registration, click the **Delete** (🗑) icon corresponding to the person phone.

4. Click **Validate and Save**.
   The phone details are added for the person.

Related Topics

For more information on...	See...
How to define a customer registration	Defining a Customer Registration on page 509
How to edit a customer registration	Editing the Customer Registration Details on page 577
How to copy a customer registration	Copying a Customer Registration on page 552

Adding the Identifier Details of a Person

Prerequisites

To add the identifier details of a person, you should have:

- Person identifier types defined in the application.

Procedure

To add the identifier details of a person:

1. Ensure that the **Person IDs** section is expanded in the **Main** page when you are defining, editing, or copying a *c*ustomer registration.

   The **Person IDs** section contains the following columns:

Column Name	Column Description	Mandatory (Yes or No)
Primary ID	Used to indicate whether the person identifier is primary or not.	Yes (Conditional)
		Note: This field is required while adding the identifier details of a person.
Person Identifier Type	Used to indicate the identifier type which you want to add for the person.	Yes (Conditional)
	Note: The list includes only those person identifier types where the person identifier type entity is set to **Customer Registration**.	**Note:** This field is required while adding the identifier details of a person.

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Column Name	Column Description	Mandatory (Yes or No)
Person Identifier	Used to specify the value of the person identifier type.	Yes (Conditional) **Note:** This field is required while adding the identifier details of a person.
Identifier Format	Displays the format in which the person identifier is specified for the person.	Not applicable

2. Enter the required details in the **Person IDs** section.
3. If you want to add more than one person identifier for the person, click the **Add** (+) icon and *t*hen repeat step *2*.

Note: However, if you want to remove a person identifier from the person, click the **Delete** (🗑) icon corresponding to the person identifier.

4. Click **Validate and Save**.
   The identifier details are added for the person.

Related Topics

For more information on...	See...
How to define a customer registration	Defining a Customer Registration on page 509
How to edit a customer registration	Editing the Customer Registration Details on page 577
How to copy a customer registration	Copying a Customer Registration on page 552

Adding the Contact Details of a Person

Prerequisites

To add the contact details of a person, you should have:

- Address type codes and countries defined in the application.

Procedure

To add the contact details of a person:

1. Ensure that the **Person Addresses** section in the **Contact** page is expanded when you are defining, editing, or *c*opying a customer registration.

   The **Person Addresses** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Address Type Code	Used to indicate the type of address that you want to add for the person. **Note:** The list includes only those address type codes where the address type code entity is set to **Customer Registration**.	Yes
Effective Date	Used to specify the date from when the address is effective for the person.	Yes
Season	Used to specify the season for which the address is effective for the person.	Yes (Conditional)

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Field Name	Field Description	Mandatory (Yes or No)
	Note: This field appears when you select the **Person Seasonal** option from the Address Type Code field.	**Note:** This field is required while adding the seasonal contact details of a person.
Country	Used to indicate the country where the person is located. **Note:** The list includes only those countries which are already defined in the system. On selecting a country, only those address fields which are set as **Optional** while defining the country appear in the **Person Addresses** section. Also, the labels of the address fields will change depending on the business label which is defined for the respective address field in the **Country** screen.	Yes
Address 1	Used to specify the first line of the address. It may contain details, such as house number and apartment name.	No
Address 2	Used to specify the second line of the address. It may contain details, such as street name.	No
City	Used to specify the city name.	No
Address 3	Used to specify the third line of the address. It may contain the landmark details.	No
County	Used to specify the county name.	No
State	Used to indicate the state where the city or county is located. **Note:** The states listed in this field change depending on the country that you have selected.	No
Province	Used to specify the location within the country where the person is located.	No
Address 4	Used to specify the fourth line of the address.	No
Postal	Used to specify the postal or zip code of the address.	No
House Type	Used to indicate the type of the house. **Note:** The list includes only those values which are defined in the **HOUSE_TYPE** lookup field.	No
In City Limit	Used to indicate whether the address is within the city limit. The valid values are:	No

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Field Name	Field Description	Mandatory (Yes or No)
	• Yes • No	
Geographic Code	Used to specify the geographic code of the address.	No

Note: The above mentioned fields appear in the **Person Addresses** section when the respective data is available for the person.

In addition, the **Person Addresses** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Override Mailing Name - Name1	Used to specify the name using which you want to override the person's mailing name.	Yes (Conditional) **Note:** This field is required while overriding the persons contact name.
Override Mailing Name - Name2	Used to specify the name using which you want to override the person's override mailing name 1.	Yes (Conditional) **Note:** This field is required while overriding the persons **Override Mailing Name - Name1**.
Override Mailing Name - Name3	Used to specify the name using which you want to override the person's override mailing name 2.	Yes (Conditional) **Note:** This field is required while overriding the persons **Override Mailing Name - Name2**.
Email Address	Used to specify the email address of the person.	No

2. Enter the required details in the **Person Addresses** section.
3. If you want to add more than one contact details of the person, click the **Add** (+) icon in the upper right corner *of* this section and then repeat step *2*.

Note: However, if you want to remove the contact details of the person, click the **Delete** (🗑) icon in the upper right corner of this section.

4. Click **Validate and Save**.
   The contact details are added for the person.

Related Topics

For more information on...	See...
How to define a customer registration	Defining a Customer Registration on page 509
How to edit a customer registration	Editing the Customer Registration Details on page 577
How to copy a customer registration	Copying a Customer Registration on page 552

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Defining a Characteristic for a Person

Prerequisites

To define a characteristic for a person, you should have:

- Characteristic types defined in the application (where the characteristic entity is set to **Customer Registration**)

Procedure

To define a characteristic for a person:

1. Ensure that the **Characteristics** section is expanded in the **Person Characteristics** page when you are defining, *e*diting, or copying a customer registration.

   The **Characteristics** section contains the following columns:

Field Name	Field Description	Mandatory (Yes or No)
Effective Date	Used to specify the date from when the characteristic is effective for the person.	Yes (Conditional) **Note:** This field is required while defining a characteristic for the person.
Characteristic Type	Used to indicate the characteristic type. **Note:** The list includes only those characteristic types where the characteristic entity is set to **Customer Registration**.	Yes (Conditional) **Note:** This field is required while defining a characteristic for the person.
Characteristic Value	Used to specify the value for the characteristic type. **Note:** If you select a predefined characteristic type, the **Search** (🔍) icon appears corresponding to the **Characteristic Value** field. On clicking the **Search** icon, the **Predefined Characteristic Search** window appears. On specifying the value for a predefined characteristic type, the description of the characteristic value appears corresponding to the **Characteristic Value** field.	Yes (Conditional) **Note:** This field is required while defining a characteristic for the person.

2. Enter the required details in the **Characteristics** section.
3. If you want to define more than one characteristic for the person, click the **Add** (+) icon and then *r*epeat step *2*.

   Note: However, if you want to remove a characteristic from the person, click the **Delete** (🗑) icon corresponding to the characteristic.

4. Click **Validate and Save**.
   The characteristic is defined for the person.

Related Topics

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For more information on...	See...
How to define a customer registration	Defining a Customer Registration on page 509
How to edit a customer registration	Editing the Customer Registration Details on page 577
How to copy a customer registration	Copying a Customer Registration on page 552

Defining a Person to Person Relationship for a Person

Prerequisites

To define a person to person relationship for a person, you should have:

- Relationship types defined in the application (where the relationship entity is set to **Customer Registration**)

Procedure

To define a person to person relationship for a person:

1. Ensure that the **Related Person Information** section is expanded in the **Hierarchy** page when you are *d*efining, editing, or copying a customer registration.

   The **Related Person Information** section contains the following columns:

Column Name	Column Description	Mandatory (Yes or No)
Related Person ID	Used to indicate the person with whom you want to define the person to person relationship of the main customer.	Yes (Conditional) **Note:** This field is required while defining a person to person relationship for a person.
	Note: The **Search** (🔍) icon appears corresponding to the **Related Person ID** field. On clicking the **Search** icon, the **Person Search** window appears. On specifying the person, the description of the person appears corresponding to the **Related Person ID** field.	
Parent/Child	Used to indicate whether the related person is a parent or a child. The valid values are: • Parent • Child	Yes (Conditional) **Note:** This field is required while defining a person to person relationship for a person.
Relationship Type	Used to indicate the person to person relationship type.	Yes (Conditional) **Note:** This field is required while defining a person to person relationship for a person.
	Note: The list includes only those relationship types where the relationship entity is set to **Customer Registration**.	
Start Date	Used to indicate the date from when the person to person relationship is effective.	Yes (Conditional)

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Column Name	Column Description	Mandatory (Yes or No)
	Note: The start date cannot be later than the end date.	**Note:** This field is required while defining a person to person relationship for a person.
End Date	Used to indicate the date till when the person to person relationship is effective. **Note:** The end date cannot be earlier than the start date.	No
Financial Relationship	Used to indicate whether the related person is financially responsible or not.	Yes (Conditional) **Note:** This field is required while defining a person to person relationship for a person.
Characteristics	On clicking the **Add** (+) icon, you can define a list of characteristics for the person to person relationship.	No

2. Enter the required details in the **Related Person Information** section.
3. If you want to define more than one person to person relationship for the person, click the **Add** (+) icon and *t*hen repeat step *2*.

Note: However, if you want to remove a person to person relationship from the person, click the **Delete** (🗑) icon corresponding to the related person.

4. Click **Validate and Save**.
   The person to person relationship is defined for the person.

Related Topics

For more information on...	See...
How to define a customer registration	Defining a Customer Registration on page 509
How to edit a customer registration	Editing the Customer Registration Details on page 577
How to copy a customer registration	Copying a Customer Registration on page 552

Defining a Characteristic for a Person to Person Relationship

Prerequisites

To define a characteristic for a person to person relationship, you should have:

- Characteristic types defined in the application (where the characteristic entity is set to **Person Relationship**)

Procedure

To define a characteristic for a person to person relationship:

1. Ensure that the **Related Person Information** section is expanded in the **Hierarchy** page when you are *d*efining, editing, or copying a customer registration.

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2. Click the **Add** (+) icon in the **Characteristics** column corresponding to the related person.

   The following columns appear in the **Related Person Information** section.

Column Name	Column Description	Mandatory (Yes or No)
Effective Date	Used to specify the date from when the characteristic is effective for the person to person relationship.	Yes (Conditional) **Note:** This field is required while defining a characteristic for the person to person relationship.
Characteristic Type	Used to indicate the characteristic type. **Note:** The list includes only those characteristic types where the characteristic entity is set to **Person Relationship**.	Yes (Conditional) **Note:** This field is required while defining a characteristic for the person to person relationship.
Characteristic Value	Used to specify the value for the characteristic type. **Note:** If you select a predefined characteristic type, the **Search** (🔍) icon appears corresponding to the **Characteristic Value** field. On clicking the **Search** icon, the **Predefined Characteristic Search** window appears. On specifying the value for a predefined characteristic type, the description of the characteristic value appears corresponding to the **Characteristic Value** field.	Yes (Conditional) **Note:** This field is required while defining a characteristic for the person to person relationship.

3. Enter the required details in the **Related Person Information** section.
4. If you want to define more than one characteristic for the person to person relationship, click the **Add** (+) *i*con and then *r*epeat step *2*.

   Note: However, if you want to remove a characteristic from the person to person relationship, click the **Delete** (🗑) icon corresponding to the characteristic.

5. Click **Validate and Save**.
   The characteristic is defined for the person to person relationship.

Related Topics

For more information on...	See...
How to define a customer registration	Defining a Customer Registration on page 509
How to edit a customer registration	Editing the Customer Registration Details on page 577
How to copy a customer registration	Copying a Customer Registration on page 552
How to define a person to person relationship for a person	Defining a Person to Person Relationship for a Person on page 519

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Adding an Account for a Person

Prerequisites

To add the account for a person, you should have:

- Customer class, divisions, currencies, account categories, access groups, accrual cycles, and bill cycles defined in the application
- Account identifier types defined in the application
- Auto pay source codes, auto pay methods, and auto pay route types defined in the application
- Account relationship types defined in the application
- Address sources, bill formats, and bill route types defined in the application
- Characteristic types defined in the application (where the characteristic entity is set to **Account**)

Procedure

To add an account for a person:

1. Ensure that the **Accounts** section is expanded in the **Accounts** page when you are adding, editing, or removing *a*n account of a person.

   The **Accounts** section contains the following columns:

Column Name	Column Description	Mandatory (Yes or No)
Sequence No.	Displays the sequence number of the account.	Not applicable
Template	Displays the account template using which the account is added for the person.	Not applicable
Customer Class	Indicates the customer class to which the account belongs.	Not applicable
Division	Indicates the division to which the account belongs.	Not applicable
Primary Identifier Type	Indicates the primary identifier type using which the account is added for the person.	Not applicable
Identifier Value	Displays the value of the primary identifier type.	Not applicable
Account Information	Displays the concatenated string of information about the account that is added for the person.	Not applicable
View / Edit	On clicking the **View / Edit** (✎) icon, you can view or edit the details of the account.	Not applicable

   Note: No information appears in the above columns if an account is not yet added for the person.

2. Click the **Add New Account** button in the **Accounts** section.

   The **Customer Registration - Add Account** screen appears. It contains the following pages:

   - **Main** - Used to specify basic information about the account.
   - **Auto Pay** - Used to add the automatic payment details of the account.
   - **Persons** - Used to associate a person to the account.
   - **Account Characteristics** - Used to define a list of characteristics for the account.

   The **Main** page contains the following sections:

   - **Main** - Used to specify basic details about the account.

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- **Account Identifiers** - Used to add the identifier details for the account.

The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Customer Class	Used to indicate the customer class to which the account belongs.	Yes
Division	Used to indicate the division to which the account belongs. **Note:** You can only view those divisions to which you have access in the **Division** list.	Yes
Set Up Date	Used to specify the date when the account was initially set up for the person. **Note:** By default, the current date appears in this field.	Yes
Invoice Currency	Used to indicate the currency in which you want to generate invoice for the account. **Note:** The list includes only those currencies which are defined in the system.	Yes
Account Category	Used to indicate the category to which the account belongs. The valid values are: • **Invoice Account** - Indicates that the account will be used to bill charges of the usage accounts. It will not have charges of its own. • **Settlement Account** - Indicates that the account will be used only for settlement (i.e., for payments). • **Usage Account** - Indicates that the account will have its own charges. If the usage account is linked to any construct, the usage account's charges are billed through an invoice account. Otherwise, the usage account is billed individually. **Note:** The list includes only those values which are present in the **ACCT_USAGE_FLG** lookup field.	Yes
Access Group	Used to indicate the users who have right to view and update the details of the account.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The **Search** (🔍) icon appears corresponding to the **Access Group** field. On clicking the **Search** icon, the **Access Group Search** window appears. On specifying the access group, the description of the access group appears corresponding to the **Access Group** field.	
Exclude Accrual	Used to indicate whether you want to exclude the account during accrual calculation. **Note:** The account is eligible for accrual, by default, when the division to which the account belongs is eligible for accrual. If you want to exclude the account from accrual, you must click the **Exclude Accrual** option. On clicking the **Exclude Accrual** option, the **Accrual Cycle** and **Accrual Type** fields are disabled.	No
Accrual Cycle	Used to indicate the accrual cycle for the account. **Note:** The **Search** (🔍) icon appears corresponding to the **Accrual Cycle** field. On clicking the **Search** icon, the **Accrual Cycle Search for Cust Reg** window appears. On specifying the accrual cycle, the description of the accrual cycle appears corresponding to the **Accrual Cycle** field. This field is disabled when you select the **Exclude Accrual** option.	No
Accrual Type	Used to indicate the accrual type that you want to use for the account during accrual calculation.	No

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Field Name	Field Description	Mandatory (Yes or No)
	Note: You can only specify an account level accrual type that is associated with the division to which the account belongs. The **Search** (🔍) icon appears corresponding to the **Accrual Type** field. On clicking the **Search** icon, the **Accrual Type Search for Cust Reg** window appears. On specifying the accrual type, the description of the accrual type appears corresponding to the **Accrual Type** field. This field is disabled when you select the **Exclude Accrual** option.	
Product	Used to indicate the product for which the account is enrolled. **Note:** The **Search** (🔍) icon appears corresponding to the **Product** field. On clicking the **Search** icon, the **Search Product** window appears.	Yes (Conditional) **Note:** This field is required while enrolling an account for a product.
Eligible for Repricing	Used to indicate whether the account is eligible for repricing when the account attributes (defined as parameters in the system) are changed. **Note:** Only accounts where the person and child person are the main customers are considered for repricing. The system creates the repricing request for the account irrespective of whether the account is eligible for repricing or not.	No
Bill Cycle	Used to indicate the bill cycle for the account.	No
Bill Lead Days	Used to indicate whether you want to bill the account in advance. You need to specify the number of days that is used to derive the cut-off date for advance billing. **Note:** In case you don't want to bill the account in advance, you must specify **0** in this field.	Yes
Comments	Used to specify additional information about the account.	No

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Field Name	Field Description	Mandatory (Yes or No)
Immediate Refund	Used to indicate whether you want to initiate immediate refund for the account.	No

3. Enter the required details in the **Main** section.
4. Add, edit, or remove the identifier details of the account in the **Account Identifiers** section.
5. Add, edit, or remove the automatic payment details of the account in the **Auto Pay** page, if required.
6. Associate or disassociate persons from the account in the **Persons** page, if required.
7. Define, edit, or remove characteristics of the account in the **Account Characteristics** page, if required.
8. Add, edit, or remove the credit rating details of the account in the **Credit Ratings** page, if required.
9. Click **Validate and Save**.
   The account is added for the person.

Related Topics

For more information on...	See...
How to define a customer registration	Defining a Customer Registration on page 509
How to edit a customer registration	Editing the Customer Registration Details on page 577
How to copy a customer registration	Copying a Customer Registration on page 552
How to add the identifier details of an account	Adding the Identifier Details of an Account on page 528
How to add the automatic payment details of an account	Adding the Automatic Payment Details of an Account on page 529
How to associate a person to an account	Associating a Person to an Account on page 532
How to define a characteristic for an account	Defining a Characteristic for an Account on page 535
How to add the credit rating details for an account	Adding the Credit Rating Details for an Account on page 526

Adding the Credit Rating Details for an Account

Prerequisites

To add the credit rating details for an account, you should have:

- Collection classes defined in the application

Procedure

To add the credit rating details for an account:

1. Ensure that the **Credit Ratings** page is expanded in the **Customer Registration - Add Account** screen when you are adding or editing the account of a person.

   The **Credit Ratings** page contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Collection Class	Used to indicate how the account's debt is reviewed by the credit and collections	Yes (Conditional)

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Field Name	Field Description	Mandatory (Yes or No)
	processes (i.e., the account debt monitor and the write-off monitor).	**Note:** This field is required while adding the credit rating details for an account.
Postpone Credit Review Until	Used to specify the date till when you want to postpone the account's debt review by the credit and collections processes (i.e., the account debt monitor and the write-off monitor).	Yes (Conditional) **Note:** This field is required while adding the credit rating details for an account.
Last Credit Review Date	Used to indicate the last review date of the account's debt by the account debt monitor.	Yes (Conditional) **Note:** This field is required while adding the credit rating details for an account.
Current Credit Rating	Displays the current credit rating.	Not applicable
Current Cash Only Score	Displays the current cash only score.	Not applicable
Start Date	Used to specify the date from when the credit rating transaction affects the account's credit rating and cash-only score. **Note:** The start date cannot be later than the end date	Yes (Conditional) **Note:** This field is required while adding the credit rating details for an account.
End Date	Used to specify the date till when the credit rating transaction affects the account's credit rating and cash-only score. **Note:** The end date cannot be earlier than the start date.	No
Affect Credit Rating By	Used to specify the effect of the credit rating transaction on the account's credit score. **Note:** This should be a negative number because the lower the score, the worse the credit rating.	Yes (Conditional) **Note:** This field is required while adding the credit rating details for an account.
Affect Cash Only Score By	Used to specify the effect of the credit rating transaction on the account's cash-only score. **Note:** This should be a positive number because the higher the score, the greater the chance for the account to be marked as cash-only.	Yes (Conditional) **Note:** This field is required while adding the credit rating details for an account.
Comments	Used to specify additional information about the credit rating for the account.	No

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> **Note:** The **Credit Ratings** page appears in the **Customer Registration - Add Account** screen when you are defining, editing, or copying a customer registration which is created using the **C1-CustomerRegistrationBanking** business object.

2. Enter the required details in the **Credit Ratings** page.
3. If you want to add more than one credit rating details for the account, click the **Add** (+) icon and then repeat *s*tep 2.

> **Note:** However, if you want to remove a credit rating detail from the account, click the **Delete** (🗑) icon.

4. Click **Validate and Save**.
   The credit rating details are added for the account.

Related Topics

For more information on...	See...
How to define a customer registration	Defining a Customer Registration on page 509
How to edit a customer registration	Editing the Customer Registration Details on page 577
How to copy a customer registration	Copying a Customer Registration on page 552
How to add an account for a person	Adding an Account for a Person on page 522
How to edit the account details of a person	Editing the Account Details of a Person on page 548

Adding the Identifier Details of an Account

Prerequisites

To add the identifier details of an account, you should have:

- Account identifier types defined in the application.

Procedure

To add the identifier details of an account:

1. Ensure that the **Account Identifiers** section is expanded in the **Customer Registration - Add Account** *s*creen when you are adding or editing the account of a person.

   The **Account Identifiers** section contains the following columns:

Column Name	Column Description	Mandatory (Yes or No)
Primary ID	Used to indicate whether the account identifier is primary or not.	Yes
Account Identifier Type	Used to indicate the identifier type for the account.	Yes (Conditional) **Note:** This field is required while adding an account identifier.
Primary Account Identifier	Used to specify the primary account identifier for the account identifier type.	Yes (Conditional)

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Column Name	Column Description	Mandatory (Yes or No)
		Note: This field is required while adding an account identifier.

Note: You must specify at least one primary identifier while adding an account for a person.

2. Enter the required details in the **Account Identifiers** section.
3. If you want to add more than one account identifier for the account, click the **Add** (+) icon and then repeat *s*tep *2*.

Note: However, if you want to remove an account identifier from the account, click the **Delete** (🗑) icon corresponding to the account identifier type.

4. Click **Validate and Save**.
   The identifier details are added for the account.

Related Topics

For more information on...	See...
How to define a customer registration	Defining a Customer Registration on page 509
How to edit a customer registration	Editing the Customer Registration Details on page 577
How to copy a customer registration	Copying a Customer Registration on page 552
How to add an account for a person	Adding an Account for a Person on page 522
How to edit the account details of a person	Editing the Account Details of a Person on page 548

Adding the Automatic Payment Details of an Account

Prerequisites

To add the automatic payment details of an account, you should have:

- Auto pay source codes, auto pay methods, and auto pay route types defined in the application

Procedure

To add the automatic payment details of an account:

1. Ensure that the **Auto Pay** page is expanded in the **Customer Registration - Add Account** screen when you *a*re adding or editing the account of a person.

   The **Auto Pay** page contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Defer Auto Pay Date	Used to specify the date after which automatic payments can be created for the account. The system will hold the automatic payment process for the account till the specified duration. It will allow to create automatic payments for the debit bills through a batch process only after the specified date.	No
Rule Based Auto Pay	Used to indicate whether you want to define the rule based auto pay instructions for the account.	No

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Field Name	Field Description	Mandatory (Yes or No)
Auto Pay Usage	Used to indicate whether the auto pay option is available for automatic credit, automatic debit, or for both automatic credit and debit. The valid values are: • **Credit** - Used to indicate that the auto pay option is only available for automatic refunds. • **Credit and Debit** - Used to indicate that the auto pay option is available for both automatic refunds and automatic payments. • **Debit** - Used to indicate that the auto pay option is only available for automatic payments. **Note:** You can define multiple auto pay options for an account with the same priority but with different auto pay usage. In other words, multiple auto pay options for an account with the same auto pay usage cannot have the same priority.	Yes
Start Date	Used to indicate the date from when the automatic payment option is effective for the account. **Note:** The start date cannot be later than the end date.	Yes (Conditional) **Note:** This field is required while adding the automatic payment details of the account
End Date	Used to indicate the date till when the automatic payment option is effective for the account. **Note:** The end date cannot be earlier than the start date.	No
Percentage	Used to specify the contribution of payment amount in percentage from the auto pay source (i.e., bank account) when the **Split Automatic Payment** feature is used. It is used to split the automatic payment in percentage between two or more automatic payment options.	Yes (Conditional) **Note:** This field is required while adding the automatic payment details of the account
Priority	Used to indicate the order in which the system should consider the automatic payment option when multiple automatic payment options are defined for the same date range.	Yes (Conditional) **Note:** This field is required while adding the automatic payment details of the account
Auto Pay Source Code	Used to indicate the financial institution that receives the automatic payment request.	Yes (Conditional)

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The **Search** (🔍) icon appears corresponding to the **Auto Pay Source Code** field. On clicking the **Search** icon, the **Auto Pay Source Search** window appears. On specifying the auto pay source code, the description of the auto pay source code appears corresponding to the **Auto Pay Source Code** field.	**Note:** This field is required while adding the automatic payment details of the account
Auto Pay Method	Used to indicate the method using which you want the system to process the automatic payment for the account. The valid values are: • Direct Debit • Payment Advice	Yes (Conditional) **Note:** This field is required while adding the automatic payment details of the account
Auto Pay Route Type	Used to indicate when and how the automatic payment request of the account is routed to the financial institution. **Note:** The **Search** (🔍) icon appears corresponding to the **Auto Pay Route Type** field. On clicking the **Search** icon, the **Auto Pay Route Type Search** window appears. On specifying the auto pay route type, the description of the auto pay route type appears corresponding to the **Auto Pay Route Type** field.	Yes (Conditional) **Note:** This field is required while adding the automatic payment details of the account
Account Number	Used to specify the account number for which you want to add the automatic payment details.	Yes (Conditional) **Note:** This field is required while adding the automatic payment details of the account
Expires On	Used to specify the month and year of expiry for the automatic payment of the account.	Yes (Conditional) **Note:** This field is required while adding the automatic payment details of the account
Name	Used to specify the account name for which you want to add the automatic payment details.	Yes (Conditional) **Note:** This field is required while adding the automatic payment details of the account

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Field Name	Field Description	Mandatory (Yes or No)
Maximum Withdrawal Amount	Used to specify the maximum amount which can be withdrawn from the account through the automatic payment method.	Yes (Conditional) **Note:** This field is required while adding the automatic payment details of the account
Comments	Used to specify additional information about the automatic payment for the account.	No

2. Enter the required details in the **Auto Pay** page.
3. If you want to add more than one automatic payment details of the account, click the **Add** (+) icon and then *r*epeat step *2*.

Note: However, if you want to remove an automatic payment detail from the account, click the **Delete** (🗑) icon.

4. Click **Validate and Save**.
   The automatic payment details are added for the account.

Related Topics

For more information on...	See...
How to define a customer registration	Defining a Customer Registration on page 509
How to edit a customer registration	Editing the Customer Registration Details on page 577
How to copy a customer registration	Copying a Customer Registration on page 552
How to add an account for a person	Adding an Account for a Person on page 522
How to edit the account details of a person	Editing the Account Details of a Person on page 548

Associating a Person to an Account

Prerequisites

To associate a person to an account, you should have:

- Account relationship types defined in the application

Procedure

To associate a person to an account:

1. Ensure that the **Persons** page is expanded in the **Customer Registration - Add Account** screen when you are *a*dding or editing the account of a person.

   The **Persons** page contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Person ID	Used to indicate the person you want to associate with the account.	Yes (Conditional)

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The **Search** (🔍) icon appears corresponding to the **Person ID** field. On clicking the **Search** icon, the **Person Search** window appears. On specifying the person, the concatenated string of information about the person appears below the **Person ID** field.	**Note:** This field is required while associating a person to an account.
Person Name	Displays the name of the person.	Not applicable
Main Customer	Used to indicate whether the associated person is the main customer of the account.	No
Financially Responsible	Used to indicate whether the associated person is financially responsible for the account's debt.	No
Account Relationship Type	Used to indicate the relationship of the associated person with the main account.	Yes (Conditional) **Note:** This field is required while associating a person to an account.

Note: By default, the details of the main customer appears in the **Persons** page. Click the **Add** (+) icon to associate a new person to the account.

2. Enter the required details in the **Persons** page.
3. Add the bill routing information of the person in the **Bill Routing Information** section, if required.
4. If you want to associate more than one person to the account, click the **Add** (+) icon and then *r*epeat step *2*.

Note: However, if you want to remove a person from the account, click the **Delete** (🗑) icon.

5. Click **Validate and Save**.
   The person is added to the account.

Related Topics

For more information on...	See...
How to define a customer registration	Defining a Customer Registration on page 509
How to edit a customer registration	Editing the Customer Registration Details on page 577
How to copy a customer registration	Copying a Customer Registration on page 552
How to add an account for a person	Adding an Account for a Person on page 522
How to edit the account details of a person	Editing the Account Details of a Person on page 548

Adding the Bill Routing Information for an Account

Prerequisites

To add the bill routing information for an account, you should have:

- Bill formats, address sources, and bill route types defined in the application

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Procedure

To add the bill routing information for an account:

1. Ensure that **Bill Routing Information** section is expanded in the **Persons** page when you are adding or editing *t*he account of a person.

   The **Bill Routing Information** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Receives Copy of Bill	Used to indicate whether you want the person to receive a copy of the account's bill. **Note:** By default, the **Receives Copy of Bill** check box is selected if the person is the main customer of the account.	Yes (Conditional) **Note:** This field is required while adding the bill routing information for an account.
Bill Format	Used to indicate the format in which you want the person to receive the account's bill. The valid values are: • Detailed • Summary **Note:** By default, this field is disabled. It is enabled only when the **Receives Copy of Bill** check box is selected.	Yes (Conditional) **Note:** This field is required while adding the bill routing information for an account.
Address Source	Used to indicate the address where you want to mail the account's bill. The valid values are: • Account Override • Main • Multiple Account Override • Person **Note:** If you select the **Address Source** as **Account Override**, the **Account Override Address** section appears in the **Persons** page where you can add the account override address of the person.	Yes (Conditional) **Note:** This field is required while adding the bill routing information for an account.
Number of Bill Copies	Used to specify the number of copies of the account's bill you want the person to receive. **Note:** By default, this field is disabled. It is enabled when the **Receives Copy of Bill** check box is selected.	Yes (Conditional) **Note:** This field is required while adding the bill routing information for an account.
Bill Route Type	Used to indicate how the account's bill is sent to the person. **Note:** By default, this field is disabled. It is enabled when the **Receives Copy of Bill** check box is selected.	Yes (Conditional) **Note:** This field is required while adding the bill routing information for an account.
Receives Notification	Used to indicate whether you want the person to receive notifications about the account's bill.	Yes (Conditional)

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Field Name	Field Description	Mandatory (Yes or No)
	Note: By default, the **Receives Notification** check box is selected if the person is the main customer of the account.	**Note:** This field is required while adding the bill routing information for an account.

2. Enter the required details in the **Bill Routing Information** section.
3. If you want to add more than one bill routing information for the account, click the **Add** (+) icon and then *r*epeat step *2*.

Note: However, if you want to remove a bill routing information from the account, click the **Delete** (🗑) icon.

4. Click **Validate and Save**.
   The bill routing information is added for the account.

Related Topics

For more information on...	See...
How to define a customer registration	Defining a Customer Registration on page 509
How to edit a customer registration	Editing the Customer Registration Details on page 577
How to copy a customer registration	Copying a Customer Registration on page 552
How to add an account for a person	Adding an Account for a Person on page 522
How to edit the account details of a person	Editing the Account Details of a Person on page 548
How to associate a person to an account	Associating a Person to an Account on page 532

Defining a Characteristic for an Account

Prerequisites

To define a characteristic for an account, you should have:

- Characteristic types defined in the application (where the characteristic entity is set to **Account**)

Procedure

To define a characteristic for an account:

1. Ensure that the **Characteristics** section is expanded in the **Account Characteristics** page when you are adding *or* editing the account of a person.

   The **Characteristics** section contains the following columns:

Column Name	Column Description	Mandatory (Yes or No)
Effective Date	Used to specify the date from when the characteristic is effective for the account.	Yes (Conditional) **Note:** This field is required while defining a characteristic for an account.
Characteristic Type	Used to indicate the characteristic type.	Yes (Conditional)

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Column Name	Column Description	Mandatory (Yes or No)
	Note: The list includes only those characteristic types where the characteristic entity is set to **Account**.	**Note:** This field is required while defining a characteristic for an account.
Characteristic Value	Used to specify the value for the characteristic type. **Note:** If you select a predefined characteristic type, the **Search** (🔍) icon appears corresponding to the **Characteristic Value** field. On clicking the **Search** icon, the **Predefined Characteristic Search** window appears. On specifying the value for a predefined characteristic type, the description of the characteristic value appears corresponding to the **Characteristic Value** field.	Yes (Conditional) **Note:** This field is required while defining a characteristic for an account.

2. Enter the required details in the **Characteristics** section.
3. If you want to define more than one characteristic for the account, click the **Add** (+) icon *a*nd then repeat step *2*.

Note: However, if you want to remove a characteristic from the account, click the **Delete** (🗑) icon corresponding to the characteristic.

4. Click **Validate and Save**.
   The characteristic is defined for the account.

Related Topics

For more information on...	See...
How to define a customer registration	Defining a Customer Registration on page 509
How to edit a customer registration	Editing the Customer Registration Details on page 577
How to copy a customer registration	Copying a Customer Registration on page 552
How to add an account for a person	Adding an Account for a Person on page 522
How to edit the account details of a person	Editing the Account Details of a Person on page 548

Defining a Policy

Prerequisites

To define a policy, you should have:

- Policy types defined in the application.
- Source systems defined in the application.
- Policy person roles defined in the application.
- Characteristic types defined in the application (where the characteristic entity is set to **Policy**)

Procedure

To define a policy:

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1. Ensure that the **Policies & Plans** section is expanded in the **Policies** page when you are defining, editing, or *r*emoving a policy from the person.

   The **Policies & Plans** section contains the following columns:

Column Name	Column Description	Mandatory (Yes or No)
Sequence No.	Displays the sequence number of the policy.	Not applicable
Template	Indicates the policy template using which the policy is defined for the person.	Not applicable
Policy Type	Indicates the policy type using which the policy is defined for the person.	Not applicable
Policy Number	Displays the policy number.	Not applicable
View / Edit	On clicking the **View / Edit** (✎) icon, you can view or edit the details of the policy.	Not applicable
Policy Plans	On clicking the **Add** (⊕) icon, you can add policy plans for the policy.	Not applicable

Note: No information appears in the above columns if a policy is not yet defined for the person.

2. Click the **Add New Policy** button in the **Policies & Plans** section.
   The **Select Policy Type** screen appears. It contains the following field:

Field Name	Field Description	Mandatory (Yes or No)
Policy Type	Used to indicate the policy type using which you want to define a policy. **Note:** If you want to create a fully-insured group policy, you must select a policy type where the policy category is set to **Fully-Insured Group** or **Fully-Insured Individual**. However, if you want to create a self-funded policy, you must select a policy type where the policy category is set to **Self-Funded**.	Yes

3. Select the required policy type from the **Policy Type** field.
4. Click **OK**.

   The **Policy** screen appears. It contains the following sections:

   - **Main** - Used to specify the basic details about the policy.
   - **Persons** - Used to associate persons with the policy.
   - **Characteristics** - Used to define the characteristics for the policy.

   The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Policy Type	Indicates the policy type using which you are defining the policy.	Not applicable
Policy Number	Used to specify the policy number.	Yes
Description	Used to specify the description for the policy.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
Source System	Used to indicate the external system from where the policy is originated. **Note:** This field is enabled when you are defining a policy using a policy type where the policy category is set to **Fully-Insured Group** or **Fully-Insured Individual**.	Yes
Start Date	Used to specify the date from when the policy is effective. **Note:** The policy start date cannot be later than the policy end date.	Yes
End Date	Used to specify the date till when the policy is effective. **Note:** The policy end date cannot be earlier than the policy start date.	Yes
Policy Person Role	Used to indicate the role of the person for whom you are defining the policy.	Yes

Note: The **Policies** page appears when you are defining, editing, or copying a customer registration which is created using the **C1-CustomerRegistrationHC** business object.

5. Enter the required details in the **Main** section.
6. Define characteristics for the policy in the **Characteristics** section, if required.
7. Associate persons to the policy in the **Persons** section, if required.
8. Click **Validate and Save**.
   The policy is defined for the person.

Related Topics

For more information on...	See...
How to define a customer registration	Defining a Customer Registration on page 509
How to edit a customer registration	Editing the Customer Registration Details on page 577
How to copy a customer registration	Copying a Customer Registration on page 552
How to edit the policy details	Editing the Policy Details on page 555
How to define a characteristic for a policy	Defining a Characteristic for a Policy on page 540
How to associate a person to a policy	Associating a Person to a Policy on page 538
How to add a plan in a policy	Adding a Plan in a Policy on page 541

Associating a Person to a Policy

Prerequisites

To associate a person to a policy, you should have:

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- Policy person roles defined in the application

Procedure

To associate a person to a policy:

1. Ensure that the **Persons** section is expanded in the **Policy** screen when you are defining or editing a policy.

   The **Persons** section contains the following columns:

Column Name	Column Description	Mandatory (Yes or No)
Person	Used to indicate the person that you want to associate to the policy. **Note:** The **Search** (🔍) icon appears corresponding to the **Person** field. On clicking the **Search** icon, the **Person Search** window appears. On specifying the person, the concatenated string of information about the person appears corresponding to the **Person** field separated by a comma (,).	Yes (Conditional) **Note:** This field is required when you are associating a person to the policy.
Sequence	Used to specify the sequence number for the associated person.	Yes (Conditional) **Note:** This field is required when you are associating a person to the policy.
Policy Person Role	Used to indicate the role of the associated person in the policy.	Yes (Conditional) **Note:** This field is required when you are associating a person to the policy.
Main Customer	Used to indicate whether the associated person is the main customer of the policy. **Note:** At a time, only one person can be the main customer of the policy. You must select this option while associating a person who is the main customer of the policy.	Yes (Conditional) **Note:** This field is required when you are associating a person to the policy.
Start Date	Used to specify the date from when the person is associated to the policy. **Note:** The start date cannot be later than the end date. The start date cannot be earlier than the policy start date and later than the policy end date.	Yes (Conditional) **Note:** This field is required when you are associating a person to the policy.

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Column Name	Column Description	Mandatory (Yes or No)
End Date	Used to specify the date till when the person is associated to the policy. **Note:** The end date cannot be earlier than the start date. The end date cannot be earlier than the policy start date and later than the policy end date.	No

2. Enter the required details in the **Persons** section.
3. If you want to associate more than one person to the policy, click the **Add** (+) icon and then *r*epeat step *2*.

Note: However, if you want to remove a person from the person, click the **Delete** (🗑) icon corresponding to the person.

4. Click **Validate and Save**.
   The person is associated to the policy.

Related Topics

For more information on...	See...
How to define a customer registration	Defining a Customer Registration on page 509
How to edit a customer registration	Editing the Customer Registration Details on page 577
How to copy a customer registration	Copying a Customer Registration on page 552
How to define a policy	Defining a Policy on page 536
How to edit the policy details	Editing the Policy Details on page 555

Defining a Characteristic for a Policy

Prerequisites

To define a characteristic for a policy, you should have:

- Characteristic types defined in the application (where the characteristic entity is set to **Policy**)

Procedure

To define a characteristic for a policy:

1. Ensure that the **Characteristics** section is expanded in the **Policy** screen when you are defining or editing a *p*olicy.

   The **Characteristics** section contains the following columns:

Column Name	Column Description	Mandatory (Yes or No)
Effective Date	Used to specify the date from when the characteristic is effective for the policy.	Yes (Conditional) **Note:** This field is required when defining a characteristic for the policy.
Characteristic Type	Used to indicate the characteristic type.	Yes (Conditional)

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Column Name	Column Description	Mandatory (Yes or No)
	Note: The list includes only those characteristic types where the characteristic entity is set to **Policy**	**Note:** This field is required when defining a characteristic for the policy.
Characteristic Value	Used to specify the value for the characteristic type. **Note:** If you select a predefined characteristic type, the **Search** (🔍) icon appears corresponding to the **Characteristic Value** field. On clicking the **Search** icon, the **Predefined Characteristic Search** window appears. On specifying the value for a predefined characteristic type, the description of the characteristic value appears corresponding to the **Characteristic Value** field.	Yes (Conditional) **Note:** This field is required when defining a characteristic for the policy.

2. Enter the required details in the **Characteristics** section.
3. If you want to define more than one characteristic for the policy, click the **Add** (+) icon and then *r*epeat step *2*.

Note: However, if you want to remove a characteristic from the policy, click the **Delete** (🗑) icon corresponding to the characteristic.

4. Click **Validate and Save**.
   The characteristic is defined for the policy.

Related Topics

For more information on...	See...
How to define a customer registration	Defining a Customer Registration on page 509
How to edit a customer registration	Editing the Customer Registration Details on page 577
How to copy a customer registration	Copying a Customer Registration on page 552
How to define a policy	Defining a Policy on page 536
How to edit the policy details	Editing the Policy Details on page 555

Adding a Plan in a Policy

Prerequisites

To add a plan in a policy, you should have:

- Policy plan templates defined in the application.
- Policy plan business objects defined in the application.
- Pricing rule types defined in the application.
- Characteristic types defined in the application (where the characteristic entity is set to **Policy Plan**)

Procedure

To add a plan in a policy:

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1. Ensure that the **Policies & Plans** section is expanded in the **Policies** page when you are adding, editing, or *r*emoving a policy plan from a policy.
2. Click the **Add** (+) icon in the **Policy Plans** column corresponding to the policy in which you want to add a *p*olicy plan.

   The following columns appear in the **Policies & Plans** section:

Column Name	Column Description	Mandatory (Yes or No)
Sequence No.	Displays the sequence number of the policy plan.	Not applicable
Template	Indicates the policy plan template using which the policy plan is added in the policy.	Not applicable
Plan Number	Displays the policy plan number.	Not applicable
Price Item	Displays the price item that is associated with the policy plan.	Not applicable
View / Edit	On clicking the **View / Edit** (✎) icon, you can view or edit the details of the policy plan.	Not applicable

Note: No information appears in the above columns if a plan is not yet added in the policy.

3. Click the **Add New Plan** button in the **Policies & Plans** section.
   The **Select Policy Plan Template** screen appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Template	Used to indicate the template using which you want to define the policy plan for the policy. **Note:** By default, the **Policy Plan - Healthcare** option is selected.	Yes
Business Object	Used to indicate the business object using which you want to define the policy plan for the policy. **Note:** By default, the **Policy Plan** option is selected.	Yes

4. Select the required template and business object from the respective fields.
5. Click **OK**.

   The **Plan** screen appears. It contains the following sections:

   - **Main** - Used to specify the basic details about the policy plan.
   - **Pricing Rule Types** - Used to associate the pricing rule types with the policy plan.
   - **Characteristics** - Used to define the characteristics for the policy plan.

   The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Price Item	Used to indicate the price item which you want to directly associate with the policy plan.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The **Search** (🔍) icon appears corresponding to the **Price Item** field. On clicking the **Search** icon, the **Price Item Search** window appears. On the specifying the price item, the concatenated string of information about the price item appears corresponding to the **Price Item** field separated by a comma (,).	
Plan Number	Used to specify the policy plan number.	Yes
Plan Name	Used to specify the description for the policy plan.	No
Start Date	Used to specify the date from when the policy plan is effective for the policy. **Note:** The policy plan start date cannot be earlier than the policy start date and later than the policy end date. The policy plan start date cannot be later than the policy plan end date.	Yes
End Date	Used to specify the date till when the policy plan is effective for the policy. **Note:** The policy plan end date cannot be earlier than the policy start date and later than the policy end date. The policy plan end date cannot be earlier than the policy plan start date.	No

6. Enter the required details in the **Main** section.
7. Associate the pricing rule types with the policy plan in the **Pricing Rule Types** section, if required.
8. Define the characteristics for the policy plan in the **Characteristics** section, if required.
9. Click **Validate and Save**.
   The policy plan is added in the policy.

Related Topics

For more information on...	See...
How to define a customer registration	Defining a Customer Registration on page 509
How to edit a customer registration	Editing the Customer Registration Details on page 577
How to copy a customer registration	Copying a Customer Registration on page 552
How to define a policy	Defining a Policy on page 536

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For more information on...	See...
How to edit the policy details	Editing the Policy Details on page 555
How to associate a pricing rule type with a policy plan	Associating a Pricing Rule Type with a Policy Plan on page 544
How to define a characteristic for a policy plan	Defining a Characteristic for a Policy Plan on page 545

Associating a Pricing Rule Type with a Policy Plan

Prerequisites

To associate a pricing rule type with a policy plan, you should have:

- Pricing rule types defined in the application.

Procedure

To associate a pricing rule type with a policy plan:

1. Ensure that the **Pricing Rule Types** section is expanded in the **Plan** screen when you are adding or editing a *p*olicy plan of a policy.

   The **Pricing Rule Types** section contains the following field in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Pricing Rule Type	Used to indicate the pricing rule type that you want to associate with the policy plan. **Note:** The **Search** (🔍) icon appears corresponding to the **Pricing Rule Type** field. On clicking the **Search** icon, the **Pricing Rule Type Search** window appears. On specifying the pricing rule type, the description of the pricing rule type appears corresponding to the **Pricing Rule Type** field.	Yes (Conditional) **Note:** This field is required while associating a pricing rule type with the policy plan.

2. Enter the required details in the **Pricing Rule Types** section.
3. If you want to associate more than one pricing rule type with the policy plan, click the **Add** (+) icon and then *r*epeat step *2*.

   Note: However, if you want to remove a pricing rule type from the policy plan, click the **Delete** (🗑) icon corresponding to the pricing rule type.

4. Click **Validate and Save**.
   The pricing rule type is associated with the policy plan.

Related Topics

For more information on...	See...
How to define a customer registration	Defining a Customer Registration on page 509
How to edit a customer registration	Editing the Customer Registration Details on page 577
How to copy a customer registration	Copying a Customer Registration on page 552

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For more information on...	See...
How to define a policy	Defining a Policy on page 536
How to edit the policy details	Editing the Policy Details on page 555
How to add a policy plan in a policy	Adding a Plan in a Policy on page 541
How to edit the policy plan details	Editing the Policy Plan Details on page 557

Defining a Characteristic for a Policy Plan

Prerequisites

To define a characteristic for a policy plan, you should have:

- Characteristic types defined in the application (where the characteristic entity is set to **Policy Plan**)

Procedure

To define a characteristic for a policy plan:

1. Ensure that the **Characteristics** section is expanded in the **Plan** screen when you are adding or editing a policy *p*lan of a policy.

   The **Characteristics** section contains the following columns:

Column Name	Column Description	Mandatory (Yes or No)
Effective Date	Used to specify the date from when the characteristic is effective for the policy plan.	Yes (Conditional) **Note:** This field is required while defining a characteristic for the policy plan.
Characteristic Type	Used to indicate the characteristic type. **Note:** The list includes only those characteristic types where the characteristic entity is set to **Customer Registration**.	Yes (Conditional) **Note:** This field is required while defining a characteristic for the policy plan.
Characteristic Value	Used to specify the value for the characteristic type. **Note:** If you select a predefined characteristic type, the **Search** (🔍) icon appears corresponding to the **Characteristic Value** field. On clicking the **Search** icon, the **Predefined Characteristic Search** window appears. On specifying the value for a predefined characteristic type, the description of the characteristic value appears corresponding to the **Characteristic Value** field.	Yes (Conditional) **Note:** This field is required while defining a characteristic for the policy plan.

2. Enter the required details in the **Characteristics** section.
3. If you want to define more than one characteristic for the policy plan, click the **Add** (+) icon and then repeat *s*tep *2*.

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> **Note:** However, if you want to remove a characteristic from the policy plan, click the **Delete** (🗑) icon corresponding to the characteristic.

4. Click **Validate and Save**.
   The characteristic is defined for the policy plan.

Related Topics

For more information on...	See...
How to define a customer registration	Defining a Customer Registration on page 509
How to edit a customer registration	Editing the Customer Registration Details on page 577
How to copy a customer registration	Copying a Customer Registration on page 552
How to define a policy	Defining a Policy on page 536
How to edit the policy details	Editing the Policy Details on page 555
How to add a policy plan in a policy	Adding a Plan in a Policy on page 541
How to edit the policy plan details	Editing the Policy Plan Details on page 557

Defining a Characteristic for a Customer Registration

Prerequisites

To define a characteristic for a customer registration, you should have:

- Characteristic types defined in the application (where the characteristic entity is set to **Customer Registration**)

Procedure

To define a characteristic for a customer registration:

1. Ensure that the **Characteristics** section is expanded in the **Registration Characteristics** page when you are *d*efining, editing, or copying a customer registration.

   The **Characteristics** section contains the following columns:

Column Name	Column Description	Mandatory (Yes or No)
Effective Date	Used to specify the date from when the characteristic is effective for the customer registration.	Yes (Conditional) **Note:** This field is required while defining a characteristic for a customer registration.
Characteristic Type	Used to indicate the characteristic type. **Note:** The list includes only those characteristic types where the characteristic entity is set to **Customer Registration**.	Yes (Conditional) **Note:** This field is required while defining a characteristic for a customer registration.
Characteristic Value	Used to specify the value for the characteristic type.	Yes (Conditional)

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Column Name	Column Description	Mandatory (Yes or No)
	Note: If you select a predefined characteristic type, the **Search** (🔍) icon appears corresponding to the **Characteristic Value** field. On clicking the **Search** icon, the **Predefined Characteristic Search** window appears. On specifying the value for a predefined characteristic type, the description of the characteristic value appears corresponding to the **Characteristic Value** field.	**Note:** This field is required while defining a characteristic for a customer registration.

2. Enter the required details in the **Characteristics** section.
3. If you want to define more than one characteristic for the customer registration, click the **Add** (+) icon and *t*hen repeat step *2*.

Note: However, if you want to remove a characteristic from the customer registration, click the **Delete** (🗑) icon corresponding to the characteristic.

4. Click **Validate and Save**.
   The characteristic is defined for the customer registration.

Related Topics

For more information on...	See...
How to define a customer registration	Defining a Customer Registration on page 509
How to edit a customer registration	Editing the Customer Registration Details on page 577
How to copy a customer registration	Copying a Customer Registration on page 552

Viewing the Details of an Account

Procedure

To view the details of an account:

1. Search for the customer registration in the **Customer Registration** screen.
2. In the **Search Results** section, click the link in the **Customer Registration Information** column *c*orresponding to the customer registration whose account details you want to view.
   The **Main** tab appears in the **Customer Registration** screen.
3. Ensure that the **Account Information** zone is expanded in the **Main** tab.
4. Click the **View** (🔗) icon corresponding to the account whose details you want to view.
   The **Account** tab appears.
5. View the details of the account in the **Account Information** zone.

Related Topics

For more information on...	See...
How to search for a customer registration	Searching for a Customer Registration on page 507
Customer Registration screen	Customer Registration (Used for Viewing) on page 559

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For more information on...	See...
Customer Registration - Main tab	Customer Registration - Main on page 560
Customer Registration - Account tab	Customer Registration - Account on page 569
Account Information zone	Account Information on page 569

Viewing the Details of a Statement Construct

Procedure

To view the details of a statement construct:

1. Search for the customer registration in the **Customer Registration** screen.
2. In the **Search Results** section, click the link in the **Customer Registration Information** column *c*orresponding to the customer registration whose statement construct details you want to view.
   The **Main** tab appears in the **Customer Registration** screen.
3. Ensure that the **Statement Construct** zone is expanded in the **Main** tab.
4. View the details of the statement construct in the **Statement Construct** zone.

Related Topics

For more information on...	See...
How to search for a customer registration	Searching for a Customer Registration on page 507
Customer Registration screen	Customer Registration (Used for Viewing) on page 559
Customer Registration - Main tab	Customer Registration - Main on page 560
Customer Registration - Account tab	Customer Registration - Account on page 569
Statement Construct zone	Statement Constructs on page 567

Editing the Account Details of a Person

Prerequisites

To edit the account details of a person, you should have:

- Customer class, divisions, currencies, access groups, accrual cycles, and bill cycles defined in the application
- Account identifier types defined in the application
- Auto pay source codes, auto pay methods, and auto pay route types defined in the application
- Account relationship types defined in the application
- Address sources, bill formats, and bill route types defined in the application
- Characteristic types defined in the application (where the characteristic entity is set to **Account**)

Procedure

To edit the account details of a person:

1. Search for the customer registration in the **Customer Registration** screen.
2. In the **Search Results** section, click the link in the **Customer Registration Information** column *c*orresponding to the customer registration whose account details you want to edit.
   The **Main** tab appears in the **Customer Registration** screen.
3. Click the **Edit** button in the **Customer Registration** zone.
   The **Main** page appears in the **Customer Registration** screen.

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4. Ensure that the **Accounts** section is expanded in the **Accounts** page.
5. Click the **Edit**(✎) icon in the **View / Edit** column corresponding to the account whose details you want to edit.

   The **Customer Registration - Add Account** screen appears. It contains the following pages:

   - **Main** - Used to specify basic information about the account.
   - **Auto Pay** - Used to add the automatic payment details of the account.
   - **Persons** - Used to associate a person to the account.
   - **Account Characteristics** - Used to define a list of characteristics for the account.

   The **Main** page contains the following sections:

   - **Main** - Used to specify basic details about the account.
   - **Account Identifiers** - Used to add the identifier details for the account.

   The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Customer Class	Used to indicate the customer class to which the account belongs.	Yes
Division	Used to indicate the division to which the account belongs. **Note:** You can only view those divisions to which you have access in the **Division** list.	Yes
Set Up Date	Displays the date from when the account is configured for the person.	Not applicable
Invoice Currency	Used to indicate the currency which you want to use for generating the invoice of the account. **Note:** The list includes only those currencies which are defined in the system.	Yes
Account Category	Displays the category to which the account belongs. The valid values are: • Invoice Account • Settlement Account • Usage Account **Note:** The list includes only those values which are present in the **ACCT_USAGE_FLG** lookup field.	Not applicable
Access Group	Used to indicate the user group that can access the account for the person.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The **Search** (🔍) icon appears corresponding to the **Access Group** field. On clicking the **Search** icon, the **Access Group Search** window appears. On specifying the access group, the description of the access group appears corresponding to the **Access Group** field.	
Exclude Accrual	Used to indicate whether the account is eligible for accrual. **Note:** By default, the account is eligible for accrual if the division to which the account belongs is eligible for accrual. If you do not want the account to be eligible for accrual, you must select the **Exclude Accrual** check box. On selecting the **Exclude Accrual** check box, the **Accrual Cycle** field is disabled.	No
Accrual Cycle	Used to indicate the accrual cycle of the account in the division. **Note:** The **Search** (🔍) icon appears corresponding to the **Accrual Cycle** field. On clicking the **Search** icon, the **Accrual Cycle Search for Cust Reg** window appears. On specifying the accrual cycle, the description of the accrual cycle appears corresponding to the **Accrual Cycle** field. This field is disabled when you click the **Exclude Accrual** check box.	No
Product	Used to indicate the product for which the account is enrolled. **Note:** The **Search** (🔍) icon appears corresponding to the **Product** field. On clicking the **Search** icon, the **Search Product** window appears.	Yes (Conditional) **Note:** This field is required while enrolling an account for a product.
Eligible for Repricing	Used to indicate whether the account is eligible for repricing when the account attributes (defined as parameters in the system) are changed.	No

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Field Name	Field Description	Mandatory (Yes or No)
	Note: Only accounts where the person and child person are the main customers are considered for repricing. The system creates the repricing request for the account irrespective of whether the account is eligible for repricing or not.	
Bill Cycle	Used to indicate the bill cycle for the account.	No
Bill Lead Days	Used to specify the number of days which is used to derive the cut-off date for advance billing. **Note:** In case you don't want to bill the account in advance, you must specify **0** in this field.	Yes
Comments	Used to specify additional information about the account.	No

6. Modify the required details of the account in the **Main** page.
7. Add, edit, or remove the identifier details of the account in the **Account Identifiers** section.
8. Add, edit, or remove the automatic payment details of the account in the **Auto Pay** page, if required.
9. Associate or disassociate persons from the account in the **Persons** page, if required.
10. Define, edit, or remove characteristics of the account in the **Account Characteristics** page, if required.
11. Add, edit, or remove the credit rating details of the account in the **Credit Ratings** page, if required.
12. Click **Validate and Save**.
    The changes made to the account are saved.

Related Topics

For more information on...	See...
How to search for a customer registration	Searching for a Customer Registration on page 507
Customer Registration screen	Customer Registration (Used for Viewing) on page 559
Customer Registration zone	Customer Registration on page 561
How to add an account for a person	Adding an Account for a Person on page 522
How to add the identifier details of an account	Adding the Identifier Details of an Account on page 528
How to add the automatic payment details of an account	Adding the Automatic Payment Details of an Account on page 529
How to associate a person to an account	Associating a Person to an Account on page 532
How to define a characteristic for an account	Defining a Characteristic for an Account on page 535
How to add the credit rating details for an account	Adding the Credit Rating Details for an Account on page 526

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Copying a Customer Registration

Instead of creating a customer registration from scratch, you can create a new customer registration using an existing customer registration. This is possible through copying a customer registration. On copying a customer registration, the details including the characteristics are copied to the new customer registration. You can then edit the details, if required.

Prerequisites

To copy a customer registration, you should have:

- Customer registration (whose copy you want to create) defined in the application
- Divisions, customer segments, customer tiers, and access groups defined in the application
- Name types, phone types, and person identifier types defined in the application
- Address type codes and countries defined in the application
- Characteristic Types defined in the application
- Relationship types defined in the application
- Policy types and policy person roles defined in the application.

> **Note:** These prerequisites are required when you are copying a customer registration which is created using the **C1-CustomerRegistrationHC** business object.

Procedure

To copy a customer registration:

1. Search for the customer registration in the **Customer Registration** screen.
2. Click the **Copy** (⎘) icon in the **Copy** column corresponding to the customer registration whose copy you want *t*o create.

   The **Customer Registration** screen appears. It contains the following pages:

   - **Main** - Used to specify basic information about the person.
   - **Contact** - Used to specify the contact information about the person.
   - **Person Characteristics** - Used to define a list of characteristics for the person.
   - **Hierarchy** - Used to define the person to person relationship for the person
   - **Accounts** - Used to add the account details of the person.
   - **Policies** - Used to specify the policy details of the person.

     > **Note:** This page appears when you are defining a customer registration using the **C1-CustomerRegistrationHC** business object.

   - **Registration Characteristics** - Used to define a list of characteristics for the customer registration.

   The **Main** page contains the following sections:

   - **Main** - Used to specify basic details about the person.
   - **Person Name** - Used to add the person names for customer registration.
   - **Person Phones** - Used to add the person phone details for customer registration.
   - **Person IDs** - Used to add the person identifiers for customer registration.

   The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Person Type	Indicates the person type using which you want to define the customer registration for the person.	Not applicable

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Field Name	Field Description	Mandatory (Yes or No)
Date of Birth	Used to specify the date when the person was born.	No
Division	Used to indicate the division to which the person belongs.	Not applicable
Person Since Date	Used to specify the date from when the person is the main customer.	No
Customer Segment	Used to indicate the customer segment to which the person belongs. **Note:** This field appears when you are defining a customer registration using the **C1-CustomerRegistrationBanking** business object.	No
Customer Tier	Used to indicate the customer tier of the customer segment to which the person belongs. **Note:** This field appears when you are defining a customer registration using the **C1-CustomerRegistrationBanking** business object.	No
Access Group	Used to indicate the user group that can access the customer registration. **Note:** The **Search** (🔍) icon appears corresponding to the **Access Group** field. On clicking the **Search** icon, the **Access Group Search** window appears.	No

3. Enter the required details in the **Main** section.
4. Add or remove the names of the person in the **Person Names** section.
5. Add or remove the phone details for the person in the **Person Phones** section.
6. Add, edit, or remove the identifier details for the person in the **Person IDs** section.
7. Define, edit, or remove the addresses of the person in the **Contact** page, if required.
8. Define, edit, or remove characteristics of the person in the **Person Characteristics** page, if required.
9. Define, edit, or remove the person to person relationship for the person in the **Hierarchy** page, if required.
10. Add, edit, or remove the account details of the person in the **Accounts** page, if required.
11. Add, edit, or remove the policy details of the person in the **Policies** page, if required.

Note: This page appears when you are defining a customer registration using the **C1-CustomerRegistrationHC** business object.

12. Define, edit, or remove characteristics of the customer registration in the **Registration Characteristics** page, *if* required.
13. Click **Validate and Save**.
    The new customer registration is defined.

Related Topics

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For more information on...	See...
How to search for a customer registration	Searching for a Customer Registration on page 507
Search Customer Registration zone	Search Customer Registration on page 499
How to add name of a person for customer registration	Adding the Names of a Person on page 512
How to add the phone details of a person for customer registration	Adding the Phone Details of a Person on page 513
How to add the identifier details of a person for customer registration	Adding the Identifier Details of a Person on page 514
How to add the contact details of a person for customer registration	Adding the Contact Details of a Person on page 515
How to define a characteristic for a person	Defining a Characteristic for a Person on page 518
How to define the hierarchy of a person	Defining a Person to Person Relationship for a Person on page 519
How to add an account for a person	Adding an Account for a Person on page 522
How to add a policy for a person	Defining a Policy on page 536
How to define a characteristic for a customer registration	Defining a Characteristic for a Customer Registration on page 546

Viewing the Parent Policies

Procedure

To view the parent policies:

1. Search for the customer registration in the **Customer Registration** screen.
2. In the **Search Results** section, click the link in the **Customer Registration Information** column *c*orresponding to the customer registration whose parent policies you want to view.
   The **Main** tab appears in the **Customer Registration** screen.
3. Ensure that the **Parent Policies** zone is expanded in the **Main** tab.
4. View the parent policies in the **Parent Policies** zone.

Related Topics

For more information on...	See...
How to search for a customer registration	Searching for a Customer Registration on page 507
Customer Registration screen	Customer Registration (Used for Viewing) on page 559
Customer Registration - Main tab	Customer Registration - Main on page 560
Parent Policies zone	Parent Policies on page 568

Viewing the Details of a Policy

Procedure

To view the details of a policy:

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1. Search for the customer registration in the **Customer Registration** screen.
2. In the **Search Results** section, click the link in the **Customer Registration Information** column *c*orresponding to the customer registration whose policy details you want to view.
   The **Main** tab appears in the **Customer Registration** screen.
3. Ensure that the **Policies** zone is expanded in the **Main** tab.
4. Click the **View** (🔗) icon corresponding to the policy whose details you want to view.
   The **Policy** tab appears in the **Customer Registration** screen.
5. View the details of the policy in the **Policy Information** zone.

Related Topics

For more information on...	**See...**
How to search for a customer registration	Searching for a Customer Registration on page 507
Customer Registration screen	Customer Registration (Used for Viewing) on page 559
Customer Registration - Main tab	Customer Registration - Main on page 560
Policies zone	Policies on page 568
Customer Registration - Policy tab	Customer Registration - Policy on page 573
Policy Information zone	Policy Information on page 573

Editing the Policy Details

Prerequisites

To edit the policy details, you should have:

- Source systems defined in the application.
- Policy person roles defined in the application.
- Characteristic types defined in the application (where the characteristic entity is set to **Policy**)

Procedure

To edit the policy details:

1. Search for the customer registration in the **Customer Registration** screen.
2. In the **Search Results** section, click the link in the **Customer Registration Information** column *c*orresponding to the customer registration whose policy details you want to edit.
   The **Main** tab appears in the **Customer Registration** screen.
3. Click the **Edit** button in the **Customer Registration** zone.
   The **Main** page appears in the **Customer Registration** screen.
4. Ensure that the **Policies & Plans** section is expanded in the **Policies** page.
5. Click the **Edit**(✎) icon in the **View / Edit** column corresponding to the policy whose details you want to edit.

   The **Policy** screen appears. It contains the following sections:

   - **Main** - Used to specify the basic details about the policy.
   - **Persons** - Used to associate persons with the policy.
   - **Characteristics** - Used to define the characteristics for the policy.

   The **Main** section contains the following fields:

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Field Name	Field Description	Mandatory (Yes or No)
Policy Type	Indicates the policy type using which the policy is defined in the system.	Not applicable
Policy Number	Used to specify the policy number.	Yes
Description	Used to specify the description for the policy.	Yes
Source System	Used to indicate the external system from where the policy is originated. **Note:** This field is enabled when you are defining a policy using a policy type where the policy category is set to **Fully-Insured Group** or **Fully-Insured Individual**.	Yes
Start Date	Used to specify the date from when the policy is effective. **Note:** The policy start date cannot be later than the policy end date.	Yes
End Date	Used to specify the date till when the policy is effective. **Note:** The policy end date cannot be earlier than the policy start date.	Yes
Policy Person Role	Used to indicate the role of the person for whom you are defining the policy.	Yes

Note: The **Policies** page appears when you are defining, editing, or copying a customer registration which is created using the **C1-CustomerRegistrationHC** business object.

6. Modify the required details in the **Main** section.
7. Define, edit, or remove characteristics of the policy in the **Characteristics** section, if required.
8. Associate or disassociate persons from the policy in the **Persons** section, if required.
9. Click **Validate and Save**.
   The changes made to the policy are saved.

Related Topics

For more information on...	See...
How to search for a customer registration	Searching for a Customer Registration on page 507
Customer Registration screen	Customer Registration (Used for Viewing) on page 559
Customer Registration zone	Customer Registration on page 561
How to define a policy	Defining a Policy on page 536
How to define a characteristic for a policy	Defining a Characteristic for a Policy on page 540
How to associate a person to a policy	Associating a Person to a Policy on page 538
How to add a plan in a policy	Adding a Plan in a Policy on page 541

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Viewing the Details of a Policy Plan

Procedure

To view the details of a policy plan:

1. Search for the customer registration in the **Customer Registration** screen.
2. In the **Search Results** section, click the link in the **Customer Registration Information** column *c*orresponding to the customer registration whose policy plan details you want to view.
   The **Main** tab appears in the **Customer Registration** screen.
3. Ensure that the **Policies** zone is expanded in the **Main** tab.
4. Click the **View** (🔗) icon corresponding to the policy whose policy plan details you want to view.
   The **Policy** tab appears in the **Customer Registration** screen.
5. Ensure that the **Plans** zone is expanded in the **Policy** tab.
6. Click the **View** (🔗) icon corresponding to the policy plan whose details you want to view.
   The **Plan Information** tab appears in the **Customer Registration** screen.
7. View the details of the policy plan in the **Plan Information** zone.

Related Topics

For more information on...	**See...**
How to search for a customer registration	Searching for a Customer Registration on page 507
Customer Registration screen	Customer Registration (Used for Viewing) on page 559
Customer Registration - Main tab	Customer Registration - Main on page 560
Policies zone	Policies on page 568
Customer Registration - Policy tab	Customer Registration - Policy on page 573
Plans zone	Plans on page 574
Plan Information tab	Customer Registration - Plan Information on page 575
Plan Information zone	Plan Information on page 575

Editing the Policy Plan Details

Prerequisites

To edit the policy plan details, you should have:

- Pricing rule types defined in the application.
- Characteristic types defined in the application (where the characteristic entity is set to **Policy Plan**)

Procedure

To edit the policy plan details:

1. Search for the customer registration in the **Customer Registration** screen.
2. In the **Search Results** section, click the link in the **Customer Registration Information** column *c*orresponding to the customer registration whose policy plan details you want to edit.
   The **Main** page appears in the **Customer Registration** screen.
3. Ensure that the **Policies & Plans** section is expanded in the **Policies** page.
4. Click the **Add** (📄) icon in the **Policy Plans** column corresponding to the policy whose plan details you want *t*o edit.

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The following columns appear in the **Policies & Plans** section:

Column Name	Column Description	Mandatory (Yes or No)
Sequence No.	Displays the sequence number of the policy plan.	Not applicable
Template	Indicates the policy plan template using which the policy is added in the policy.	Not applicable
Plan Number	Displays the policy plan number.	Not applicable
Price Item	Displays the price item that is associated with the policy plan.	Not applicable
View / Edit	On clicking the **View / Edit** (✎) icon, you can view or edit the details of the policy plan.	Not applicable

Note: No information appears in the above columns if a plan is not yet added in the policy.

5. Click the **Edit** (✎) icon in the **View / Edit** column corresponding to the policy plan whose details you want *t*o edit.

The **Plan** screen appears. It contains the following sections:

- **Main** - Used to specify the basic details about the policy plan.
- **Pricing Rule Types** - Used to associate the pricing rule types with the policy plan.
- **Characteristics** - Used to define the characteristics for the policy plan.

The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Price Item	Used to indicate the price item which you want to directly associate with the policy plan. **Note:** The **Search** (🔍) icon appears corresponding to the **Price Item** field. On clicking the **Search** icon, the **Price Item Search** window appears. On the specifying the price item, the concatenated string of information about the price item appears corresponding to the **Price Item** field separated by a comma (,).	Yes
Plan Number	Used to specify the policy plan number.	Yes
Plan Name	Used to specify the description for the policy plan.	No
Start Date	Used to specify the date from when the policy plan is effective for the policy.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The policy plan start date cannot be earlier than the policy start date and later than the policy end date. The policy plan start date cannot be later than the policy plan end date.	
End Date	Used to specify the date till when the policy plan is effective for the policy. **Note:** The policy plan end date cannot be earlier than the policy start date and later than the policy end date. The policy plan end date cannot be earlier than the policy plan start date.	No

6. Modify the required details in the **Main** section.
7. Associate or disassociate pricing rule types from the policy plan in the **Pricing Rule Types** section, if required.
8. Define, edit, or remove characteristics of the policy plan in the **Characteristics** section, if required.
9. Click **Validate and Save**.
   The changes made to the policy plan are saved.

Related Topics

For more information on...	See...
How to search for a customer registration	Searching for a Customer Registration on page 507
Customer Registration screen	Customer Registration (Used for Viewing) on page 559
Customer Registration zone	Customer Registration on page 561
How to define a policy	Defining a Policy on page 536
How to add a plan in a policy	Adding a Plan in a Policy on page 541
How to associate a pricing rule type with a policy plan	Associating a Pricing Rule Type with a Policy Plan on page 544
How to define a characteristic for a policy plan	Defining a Characteristic for a Policy Plan on page 545

Customer Registration (Used for Viewing)

The **Customer Registration** screen allows you to:

- Define a customer registration
- View the details of a customer registration
- Edit the details of a customer registration
- Delete a customer registration
- Submit a customer registration for processing

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- Approve or reject a customer registration
- Request the submitter to resubmit a customer registration for approval
- View the log of a customer registration
- Add a log entry for a customer registration

It contains the following tabs:

- Customer Registration - Main on page 560
- Customer Registration - Account on page 569
- Customer Registration - Policy on page 573

> **Note:** This tab appears when the customer registration is created using the **C1-CustomerRegistrationHC** business object.

- Customer Registration - Plan Information on page 575

> **Note:** This tab appears when the customer registration is created using the **C1-CustomerRegistrationHC** business object.

- Customer Registration - Log on page 576

For more information on...	See...
How to define a customer registration	Defining a Customer Registration on page 509
How to view the details of a customer registration	Viewing the Customer Registration Details on page 509
How to edit a customer registration	Editing the Customer Registration Details on page 577
How to delete a customer registration	Deleting a Customer Registration
How to submit a customer registration	Submitting a Customer Registration on page 579
How to approve a customer registration	Approving a Customer Registration on page 580
How to reject a customer registration	Rejecting a Customer Registration on page 581
How to request to resubmit a customer registration for approval	Requesting to Resubmit a Customer Registration for Approval on page 582
How to view the log of a customer registration	Viewing the Log of a Customer Registration on page 584
How to add a log entry for a customer registration	Adding a Log Entry for a Customer Registration on page 584

Customer Registration - Main

The **Main** tab displays information about the customer registration. It also displays information about the accounts, policies, and parent policies of the person in a customer registration. It contains the following zones:

- Customer Registration on page 561
- Bill Group Information on page 565

> **Note:** This zone appears when the customer registration is created using the **C1-CustomerRegistrationHC** business object.

- Account Information on page 569
- Statement Constructs on page 567
- Policies on page 568

> **Note:** This zone appears when the customer registration is created using the **C1-CustomerRegistrationHC** business object.

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- Parent Policies on page 568

Note: This zone appears when the customer registration is created using the **C1-CustomerRegistrationHC** business object.

Customer Registration

The **Customer Registration** zone displays the details of the customer registration. It contains of the following sections:

- **Main** - Displays the basic information about the customer registration. It contains the following fields:

Field Name	Field Description
Customer Registration Information	Displays the concatenated string of information about the customer registration separated by a comma (,).
Customer Registration Type	Indicates the customer registration type using which the customer registration is defined in the system.
Status	Indicates the status of the customer registration. The valid values are: • Approval in Progress • Bill Group Approved **Note:** This status appears when you are viewing the details of a customer registration which is created using the **C1-CustomerRegistrationHC** business object. • Complete • Draft • Draft For Update • Parent Customer Approved **Note:** This status appears only when you are viewing the details of a customer registration which is created using the **C1-CustomerRegistrationHC** business object. • Pending Final Approval **Note:** This status appears when you are viewing the details of a customer registration which is created using the **C1-CustomerRegistrationHC** business object. • Pending Pricing Correction **Note:** This status appears only when you are viewing the details of a customer registration which is created using the **C1-CustomerRegistrationHC** business object. • Rejected
Source System	Indicates the external system from where the customer registration information is received.
Person Information	Displays the concatenated string of information about the main customer for whom the customer registration is created in the system. In addition, a context menu appears corresponding to this field which helps in navigating to other screens in the application. **Note:** It has a link. On clicking the link, the **Person** screen appears where you can view the details of the respective person.

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Field Name	Field Description
Registration Source	Indicates the source through which the customer registration is created using the customer registration type. The valid values are: • File Upload • Inbound Message • Manual
Registration Source ID	Displays the source ID of the customer registration.

- **Record Actions** - The **Record Actions** section contains the following buttons:

Button Name	Button Description
Edit	Used to edit the details of the customer registration.
Delete	Used to delete the customer registration.
Submit	Used to submit the customer registration for validation and processing.
Duplicate	Used to create a new customer registration using an existing customer registration.
Approve	Used to approve the customer registration.
Reject	Used to reject the customer registration.
Return To Submitter	Used to request the submitter to resubmit the customer registration for approval.

- **Record Information** - The **Record Information** section contains the following fields:

Field Name	Field Description
Business Object	Indicates the business object using which the customer registration is created. In addition, a context menu appears corresponding to this field which helps in navigating to other screens in the application. **Note:** It has a link. On clicking the link, the **Business Object** screen appears where you can view the details of the respective business object.
Status Date/Time	Displays the date and time when the customer registration status is updated.
Create Date/Time	Displays the date and time when the customer registration is created.

- **Person Details** - Displays information about the main customer for whom the customer registration is created in the system. It contains the following fields:

Field Name	Field Description
Person Type	Indicates the person type of the main customer for whom the customer registration is defined in the system.
Date of Birth	Displays the date when the person was born.
Division	Indicates the division to which person belongs.
Person Since Date	Displays specify the date from when the person is the main customer.
Access Group	Indicates the user group that can access the customer registration. **Note:** It has a link. On clicking the link, the **Access Group** screen appears where you can view the details of the respective access group.

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Field Name	Field Description
Immediate Refund	Indicates whether the person's accounts and its child persons' accounts are eligible for the automatic refund process.

In addition, the **Person Details** section contains the following sub-sections:

- **Person Names** - Lists the primary and non-primary names of the person. It contains the following columns:

Column Name	Column Description
Name Type	Indicates the type of the name.
Name	Displays the name of the person.

- **Person Characteristics** - Lists the characteristics defined for the person. It contains the following columns:

Column Name	Column Description
Effective Date	Indicates the date from when the characteristic is effective for the person.
Characteristic Type	Indicates the characteristic type.
Characteristic value	Displays the value for the characteristic type.

- **Person Phones** - Lists the phone details of the person. It contains the following columns:

Column Name	Column Description
Phone Type	Indicates the type of the phone. The valid values are: • Business • Business Phone • Fax • Home • Mobile
Phone Number	Displays the phone number.
Extension	Displays the extension value of the phone number.
Phone Format	Displays the format in which the phone number is specified for the person.

- **Person IDs** - Lists the identifier details of the person. It contains the following columns:

Column Name	Column Description
Primary ID	Indicates whether the person identifier is primary or not.
Person Identifier Type	Indicates the identifier type of the person.
Person Identifier	Displays the value of the person identifier type.

- **Person Addresses** - Displays the contact information of the person. It contains the following fields:

Field Name	Field Description
Address Type	Indicates the type of the address.
Effective Date	Displays the date from when the address is effective for the person.
Country	Indicates the country where the person is located.

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Field Name	Field Description
Address 1	Displays the first line of the address. It may contain details, such as house number and apartment name.
Address 2	Displays the second line of the address. It may contain details, such as street name.
City	Displays the city name.
Address 3	Displays the third line of the address. It may contain the landmark details.
County	Displays the county name.
State	Indicates the state where the city or county is located.
Province	Displays the location within the country where the person is located.
Address 4	Displays the fourth line of the address.
Postal	Displays the postal or zip code of the address.
House Type	Indicates the type of the house.
In City Limit	Indicates whether the address is within the city limit. The valid values are: • Yes • No
Geographic Code	Displays the geographic code of the address.

Note:

The above mentioned fields appear in the **Person Addresses** section when the respective data is available for the person.

Also, the labels of the address fields will change depending on the business label which is defined for the respective address field in the **Country** screen.

- **Override Mailing Name** - Lists the overriding mailing names for the person. It contains the following columns:

Column Name	Column Description
Override Mailing Name - Name1	Displays the name using which you want to override the person's mailing name.
Override Mailing Name - Name2	Displays the name using which you want to override the person's override mailing name 1.
Override Mailing Name - Name3	Displays the name using which you want to override the person's override mailing name 2.
Email Address	Displays the email address of the person.

- **Related Person Information** - Lists the persons that are related to the main customer. It contains the following columns:

Column Name	Column Description
Related Person Information	Displays the concatenated string of information about the related person separated by a comma (,). In addition, a context menu appears corresponding to this field which helps in navigating to other screens in the application.

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Column Name	Column Description
	Note: It has a link. On clicking the link, the **Person Information** screen appears where you can view the details of the respective person.
Parent/Child	Indicates whether the related person is a parent or a child. The valid values are: • Parent • Child
Relationship Type	Indicates the person to person relationship type.
Start Date	Indicates indicate the date from when the person to person relationship is effective.
End Date	Indicates the date till when the person to person relationship is effective.
Financial Relationship	Indicates whether the related person is financially responsible or not.
Characteristics	On clicking the **Add** (+) icon, you can view the list of characteristics of the related person.

- **Registration Characteristics** - Lists the characteristics of the customer registration. It contains the following columns:

Column Name	Column Description
Effective Date	Indicates the date from when the characteristic is effective for the customer registration.
Characteristic Type	Indicates the characteristic type.
Characteristic value	Displays the value for the characteristic type.

Related Topics

For more information on...	See...
How to define a customer registration	Defining a Customer Registration on page 509
How to edit a customer registration	Editing the Customer Registration Details on page 577
How to copy a customer registration	Copying a Customer Registration on page 552
How to delete a customer registration	Deleting a Customer Registration
How to view the details of a customer registration	Viewing the Customer Registration Details on page 509

Bill Group Information

The **Bill Group Information** zone lists the bill groups that are defined for the person where the person is the parent customer. It contains of the following columns:

Column Name	Column Description
Customer Registration Information	Displays the concatenated string of information about the bill group in a customer registration which is defined for the person.
	Note: It has a link. On clicking the link, the **Customer Registration** screen appears where you can view the details of the respective bill group.

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Column Name	Column Description
Name	Displays the primary name of the bill group.
Relationship Type	Indicates the relationship type using which the bill group is defined for the person.
Status	Indicates the status of the bill group.

Note:

The **Bill Group Information** zone appears when you are viewing the details of a customer registration which is created using the **C1-CustomerRegistrationHC** business object and if a bill group is defined for the person where the person type is set to **Parent Customer**.

Pagination is used to display limited number of records in this zone. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

Related Topics

For more information on...	See...
How to view the details of a customer registration	Viewing the Customer Registration Details on page 509

Account Information

The **Account Information** zone lists the accounts added for the person in the customer registration. It contains of the following columns:

Column Name	Column Description
Sequence	Displays the sequence number of the account.
Template	Indicates the account template using which the account is added for the person.
Customer Class	Indicates the customer class to which the account belongs.
Division	Indicates the division to which the account belongs.
Primary Identifier Type	Indicates the primary identifier type using which the account is added for the person.
Identifier Value	Displays the value of the primary identifier type.

On clicking the **View** (🔗) icon corresponding to an account, the **Account** tab appears where you can view the details of the respective account.

Note:

No information appears in the **Account Information** zone if an account is not yet added for the person.

Pagination is used to display limited number of records in this zone. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

Related Topics

For more information on...	See...
How to add an account for a person	Adding an Account for a Person on page 522

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For more information on...	See...
How to view the details of an account	Viewing the Details of an Account on page 547
How to view the details of a customer registration	Viewing the Customer Registration Details on page 509

Statement Constructs

The **Statement Constructs** zone lists the statement constructs added for the person in the customer registration. It contains of the following columns:

Column Name	Column Description
Person Identifier	Displays the person identifier associated with the statement construct.
Person Identifier Type	Indicates the person identifier type associated with the statement construct.
Statement Construct Identifier	Displays the statement construct identifier defined for the statement construct.
Statement Address Source	Indicates the address where you want to email the statement construct.
Statement Cycle	Indicates the statement construct cycle for the person.
Statement Route Type	Indicates how the statement constructs must be sent to the person.
Status	Indicates the status of the statement construct. The valid values are: • Active • Inactive
Number of Copies	Displays the number of copies of the statement construct you want the person to receive.
Statement Format	Indicates the format of the statement construct. The valid values are: • Detail • Summary
Description	Displays the description of the statement construct.
Number of Accounts and Contracts	Indicates the accounts and contracts added in the statement construct.

Note:

No information appears in the **Statement Constructs** zone if the statement construct is not yet added for the person.

Pagination is used to display limited number of records in this zone. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

Related Topics

For more information on...	See...
How to add an account for a person	Adding an Account for a Person on page 522
How to view the statement construct details of a person	Viewing the Details of a Statement Construct on page 548
How to view the details of a customer registration	Viewing the Customer Registration Details on page 509

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Policies

The **Policies** zone lists the policies defined for the person in the customer registration. It contains the following columns:

Column Name	Column Description
Sequence	Displays the sequence number of the policy.
Template	Indicates the policy template using which the policy is defined for the person.
Policy Type	Indicates the policy type using which the policy is defined for the person.
Policy Number	Displays the policy number.

On clicking the **View** (🔗) icon corresponding to a policy, the **Policy** tab appears where you can view the details of the respective policy.

Note:

No information appears in the **Policies** zone if a policy is not yet defined for the person.

Pagination is used to display limited number of records in this zone. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

The **Policies** zone appears when you are viewing the details of a customer registration which is created using the **C1-CustomerRegistrationHC** business object.

Parent Policies

The **Parent Policies** zone lists the policies of the parent persons which are associated to the main customer through the **Hierarchy** page of the **Customer Registration** screen. It contains the following columns:

Column Name	Column Description
Sequence	Indicates the sequence number.
Policy Number	Displays the policy number.
Person Information	Indicates the information of a person.
Policy ID	Displays the policy identification number.
Link/Unlink	Indicates whether policy is linked or unlinked.
Start Date	Indicates the start date of policy.
End Date	Indicates the end date of policy.
Policy Person Role	Indicates the role of the policy person.

Note:

No information appears in the **Parent Policies** zone if a policy is not yet defined for the parent person associated to the main customer through the **Hierarchy** page of the **Customer Registration** screen..

Pagination is used to display limited number of records in this zone. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

The **Parent Policies** zone appears when you are viewing the details of a customer registration which is created using the **C1-CustomerRegistrationHC** business object.

Related Topics

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For more information on...	See...
How to view the details of a customer registration	Viewing the Customer Registration Details on page 509

Customer Registration - Account

The **Account** tab displays information about the account of the person in a customer registration. It contains the following zone:

- Account Information on page 569

Account Information

The **Account Information** zone displays information about the account added for the person in the customer registration. It contains the following sections:

- **Main** - Displays the basic information about the account. It contains the following fields:

Field Name	Field Description
Account Information	Displays the concatenated string of information about the account separated by a comma (,). In addition, a context menu appears corresponding to this field which helps in navigating to other screens in the application. **Note:** It has a link. On clicking the link, the **Account** screen appears where you can view the details of the respective account.
Customer Class	Indicates the customer class to which the account belongs.
Division	Indicates the division to which the account belongs.
Set Up Date	Displays the date when the account was initially set up for the person.
Invoice Currency	Indicates the currency in which you want to generate invoice for the account.
Account Category	Indicates the category to which the account belongs. The valid values are: • Invoice Account • Settlement Account • Usage Account
Access Group	Indicates the users who have right to view and update the details of the account.
Exclude Accrual	Indicates whether the account is excluded during accrual calculation.
Accrual Cycle	Indicates the accrual cycle of the account.
Accrual Type	Indicates the accrual type that you want to use for the account during accrual calculation.
Eligible for Repricing	Indicates whether the account is eligible for repricing when the account attributes (defined as parameters in the system) are changed.
Product	Indicates the product for which the account is enrolled.
Bill Cycle	Indicates the bill cycle of the account.
Bill Lead Days	Displays the number of days which is used to derive the cut-off date for advance billing.

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Field Name	Field Description
Comments	Displays additional information about the account.
Immediate Refund	Indicates whether the account has opted for the automatic refund process.

- **Account Identifiers** - Lists the identifiers details of the account. It contains the following columns:

Column Name	Column Description
Primary ID	Indicates whether the account identifier is primary or not.
Account Identifier Type	Indicates the identifier type for the account.
Primary Account Identifier	Displays the primary account identifier for the account identifier type.

- **Account Characteristics** - Lists the characteristics of the account. It contains the following columns:

Column Name	Column Description
Effective Date	Displays the date from when the characteristic is effective for the account.
Characteristic Type	Indicates the characteristic type.
Characteristic Value	Displays the value for the characteristic type.

Auto Pay Details - Displays the automatic payment details of the account. It contains the following fields:

Field Name	Field Description
Defer Auto Pay Date	Displays the date after which automatic payments can be created for the account.
Rule Based Auto Pay	Indicates whether you can define the rule based auto pay instructions for the account.
Auto Pay Usage	Indicates whether the auto pay option is available for automatic credit, automatic debit, or for both automatic credit and debit. The valid values are: • Credit • Credit and Debit • Debit
Start Date	Displays the date from when the automatic payment option is effective for the account.
End Date	Displays the date till when the automatic payment option is effective for the account.
Percentage	Displays the contribution of payment amount in percentage from the auto pay source (i.e., bank account) when the **Split Automatic Payment** feature is used.
Priority	Displays the order in which the system should consider the automatic payment option when multiple automatic payment options are defined for the same date range.
Auto Pay Source Code	Indicates the financial institution that receives the automatic payment request.
Auto Pay Route Type	Indicates when and how the automatic payment request of the account is routed to the financial institution.
Account Number	Displays the account number for which the automatic payment is defined.

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Field Name	Field Description
Expires On	Displays the month and year of expiry for the automatic payment of the account.
Name	Displays the account name for which the automatic payment is defined.
Maximum Withdrawal Amount	Displays the maximum amount which can be withdrawn from the account through the automatic payment method.
Comments	Displays additional information about the automatic payment for the account.

- **Account Credit Rating** - Displays the credit rating details of the account. It contains the following fields:

Field Name	Field Description
Collection Class	Indicates how the account's debt is reviewed by the credit and collections processes (i.e., the account debt monitor and the write-off monitor).
Postpone Credit Review Until	Displays the date till when you want to postpone the account's debt review by the credit and collections processes (i.e., the account debt monitor and the write-off monitor).
Last Credit Review Date	Displays the last review date of the account's debt by the account debt monitor.
Current Credit Rating	Displays the current credit rating.
Current Cash Only Score	Displays the current cash only score.
Start Date	Displays the date from when the credit rating transaction affects the account's credit rating and cash-only score.
End Date	Displays the date till when the credit rating transaction affects the account's credit rating and cash-only score.
Affect Credit Rating By	Displays the effect of the credit rating transaction on the account's credit score.
Affect Cash-Only Score By	Displays the effect of the credit rating transaction on the account's cash-only score.
Comments	Displays additional information about the credit rating for the account.

Note: The **Account Credit Rating** section appears when you are viewing the details of a customer registration which is created using the **C1-CustomerRegistrationBanking** business object.

- **Account Persons** - Displays the details of the persons associated to the account. It contains the following fields:

Field Name	Field Description
Person ID	Indicates the person associated to the account.
Person Name	Displays the name of the person associated to the account.
Main Customer	Indicates whether the associated person is the main customer of the account.
Financially Responsible	Indicates whether the associated person is financially responsible for the account's debt.
Account Relationship Type	Indicates the relationship of the associated person with the main account.

- **Account Override Address** - Displays the overridden address of the account. It contains the following fields:

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Column Name	Column Description
Country	Indicates the country where the account main customer is located.
Address 1	Displays the first line of the address. It may contain details, such as house number and apartment name.
Address 2	Displays the second line of the address. It may contain details, such as street name.
Address 3	Displays the third line of the address. It may contain the landmark details.
Address 4	Displays the fourth line of the address.
City	Displays the city name.
County	Displays the county name.
State	Indicates the state where the city or county is located.
Province	Displays the location within the country where the person is located.
Postal	Displays the postal or zip code of the address.
House Type	Indicates the type of the house.
In City Limit	Indicates whether the address is within the city limit. The valid values are: • Yes • No
Geographic Code	Displays the geographic code of the address.

Note:

The above mentioned fields appear in the **Account Override Address** section when the respective data is available for the person.

Also, the labels of the address fields will change depending on the business label which is defined for the respective address field in the **Country** screen.

- **Bill Routing Information** - Displays the bill routing information of the account. It contains the following fields:

Field Name	Field Description
Receives Copy of Bill	Indicates whether you want the person to receive a copy of the account's bill.
Bill Format	Indicates the format in which you want the person to receive the account's bill. The valid values are: • Detailed • Summary
Address Source	Indicates the address where you want the person to receive the account's bill. The valid values are: • Account Override • Main • Multiple Account Override • Person
Number of Bill copies	Displays the number of copies of the account's bill you want the person to receive.

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Field Name	Field Description
	Note: This field appears when the **Receives Copy of Bill** check box is selected.
Bill Route Type	Indicates how the account's bill is sent to the person. **Note:** This field appears when the **Receives Copy of Bill** check box is selected.
Receives Notification	Indicates whether you want the person to receive notifications about the account's bill. **Note:** By default, the **Receives Notification** check box is selected if the person is the main customer of the account.

Related Topics

For more information on...	See...
How to add an account for a person	Adding an Account for a Person on page 522
How to view the details of an account	Viewing the Details of an Account on page 547
How to view the details of a customer registration	Viewing the Customer Registration Details on page 509

Customer Registration - Policy

The **Policy** tab displays information about the policy and policy plans defined for the person in a customer registration. It contains the following zones:

- Policy Information on page 573
- Plans on page 574

Note: The **Policy** tab appears in the **Customer Registration** screen when you are viewing the details of a customer registration which is created using the **C1-CustomerRegistrationHC** business object.

Policy Information

The **Policy Information** zone displays information about the policy defined for the person in a customer registration. It contains of the following sections:

- **Main** - Displays the basic information about the policy. It contains the following fields:

Field Name	Field Description
Policy Information	Displays the concatenated string of information about the policy separated by a comma (,). **Note:** It has a link. On clicking the link, the **Policy** screen appears where you can view the details of the respective policy.
Source System	Indicates the external system from where the policy is originated.
Start Date	Displays the date from when the policy is effective.

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Field Name	Field Description
Policy Type	Indicates the policy type using which the policy is defined in the system.
End Date	Displays the date till when the policy is effective.
Policy Number	Displays the policy number.
Policy Person Role	Indicates the role of the person for whom the policy is defined in the system.

- **Persons** - Lists the persons associated to the policy. It contains the following columns:

Column Name	Column Description
Person Information	Displays the person who is associated to the policy. In addition, a context menu appears corresponding to this field which helps in navigating to other screens in the application. **Note:** It has a link. On clicking the link, the **Person** screen appears where you can view the details of the respective person.
Sequence	Displays the order in which the person is associated to the policy.
Policy Person Role	Indicates the role of the associated person in the policy.
Main Customer	Indicates whether the associated person is the main customer of the policy.
Start Date	Displays the date from when the person is associated to the policy.
End Date	Displays the date till when the person is associated to the policy.

- **Characteristics** - Lists the characteristics defined for the policy. It contains the following columns:

Column Name	Column Description
Effective Date	Displays the date from when the characteristic is effective for the policy.
Characteristic Type	Indicates the characteristic type.
Characteristic Value	Displays the value for the characteristic type.

Plans

The **Plans** zone lists the plans that are added in a policy. It contains the following columns:

Column Name	Column Description
Sequence	Displays the sequence number of the policy plan.
Template	Indicates the policy plan template using which the policy plan is added in the policy.
Policy Plan Number	Displays the policy plan number.
Price Item	Displays the price item that is associated with the policy plan.

On clicking the **View** (🔗) icon corresponding to a policy plan, the **Plan Information** tab appears where you can view the details of the respective policy plan.

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Note:

No information appears in the **Plans** zone if a plan is not yet added in the policy.

Pagination is used to display limited number of records in this zone. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

Related Topics

For more information on...	See...
How to add a plan in a policy	Adding a Plan in a Policy on page 541
How to view the details of a policy plan	Viewing the Details of a Policy Plan on page 557
How to view the details of a customer registration	Viewing the Customer Registration Details on page 509

Customer Registration - Plan Information

The **Plan Information** tab displays information about the policy plan that is added in a policy. It contains the following zone:

- Plan Information on page 575

Note: The **Plan Information** tab appears in the **Customer Registration** screen when you are viewing the details of a customer registration which is created using the **C1-CustomerRegistrationHC** business object.

Plan Information

The **Plan Information** zone displays information about the policy plan that is added in a policy. It contains of the following sections:

- **Main** - Displays the basic information about the policy plan. It contains the following fields:

Field Name	Field Description
Plan Information	Displays the concatenated string of information about the policy plan separated by a comma (,). In addition, a context menu appears corresponding to this field which helps in navigating to other screens in the application. **Note:** It has a link. On clicking the link, the **Policy Plan** screen appears where you can view the details of the respective policy plan.
Plan Number	Displays the policy plan number.
Price Item	Indicates the price item that is associated with the policy plan. **Note:** It has a link. On clicking the link, the **Price Item** screen appears where you can view the details of the respective price item.
Start Date	Displays the date from when the policy plan is effective for the policy.
End Date	Displays the date till when the policy plan is effective for the policy.

- **Pricing Rule Types** - Lists the pricing rule types that are associated with the policy plan. It contains the following column:

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Column Name	Column Description
Pricing Rule Types	Displays the pricing rule type that is associate with the policy plan.
	Note: It has a link. On clicking the link, the **Pricing Rule Type** screen appears where you can view the details of the respective pricing rule type.

- **Characteristics** - Lists the characteristics defined for the policy plan. It contains the following columns:

Column Name	Column Description
Effective Date	Displays the date from when the characteristic is effective for the policy plan.
Characteristic Type	Indicates the characteristic type.
Characteristic Value	Displays the value for the characteristic type.

Related Topics

For more information on...	See...
How to add a plan in a policy	Adding a Plan in a Policy on page 541
How to view the details of a policy plan	Viewing the Details of a Policy Plan on page 557
How to view the details of a customer registration	Viewing the Customer Registration Details on page 509

Customer Registration - Log

The **Log** tab allows you to view the complete trail of actions performed on the customer registration. It also allows you to manually add a log entry for the customer registration. It contains the following zone:

- Customer Registration Log on page 576

Customer Registration Log

The **Customer Registration Log** zone lists the complete trail of actions performed on the customer registration. It contains the following columns:

Column Name	Column Description
Date/Time	Displays the date and time when the action was performed on the customer registration due to which the log is created in the system.
Details	Displays the details of the actions performed on the customer registration.
User	Indicates the user who has performed the action on the customer registration.
Log Type	Indicates the type of log using which the action is performed on the customer registration.
Related Object	Indicates the object or entity which is created when the action is performed on the customer registration.
	Note: At present, no data appears in this column. The implementation team can build the custom logic to meet the business requirements.
Status Reason	Indicates the reason why the action is performed on the customer registration.

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Note: You can manually add a log entry for the customer registration by clicking the **Add Log Entry** link in the upper right corner of the this zone.

Related Topics

For more information on...	See...
How to view the log of a customer registration	Viewing the Log of a Customer Registration on page 584
How to add a log entry for a customer registration	Adding a Log Entry for a Customer Registration on page 584
Customer Registration - Log tab	Customer Registration - Log on page 576

Editing the Customer Registration Details

Prerequisites

To define a customer registration, you should have:

- Divisions, customer segments, customer tiers, and access groups defined in the application
- Name types, phone types, and person identifier types defined in the application
- Address type codes and countries defined in the application
- Characteristic types defined in the application (where the characteristic entity is set to **Customer Registration**)
- Relationship types defined in the application
- Policy types and policy person roles defined in the application.

Note: These prerequisites are required when you are editing a customer registration which is created using the **C1-CustomerRegistrationHC** business object.

Procedure

To edit a customer registration:

1. Search for the customer registration in the **Customer Registration** screen.
2. In the **Search Results** section, click the link in the **Customer Registration Information** column corresponding *t*o the customer registration whose details you want to edit.
   The **Main** tab appears in the **Customer Registration** screen.
3. Click the **Edit** button in the **Customer Registration** zone.

   The **Customer Registration** screen appears. It contains the following pages:

   - **Main** - Used to specify basic information about the person.
   - **Contact** - Used to specify the contact information about the person.
   - **Person Characteristics** - Used to define a list of characteristics for the person.
   - **Hierarchy** - Used to define the person to person relationship for the person
   - **Accounts** - Used to add the account details of the person.
   - **Policies** - Used to specify the policy details of the person.

     Note: This page appears when you are editing a customer registration which is created using the **C1-CustomerRegistrationHC** business object.
   - **Registration Characteristics** - Used to define a list of characteristics for the customer registration.

   The **Main** page contains the following sections:

   - **Main** - Used to specify basic details about the person.
   - **Person Name** - Used to add the person names for customer registration.
   - **Person Phones** - Used to add the person phone details for customer registration.

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- **Person IDs** - Used to add the person identifiers for customer registration.

The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Person Type	Indicates the person type using which you want to define the customer registration for the person.	Not applicable
Date of Birth	Used to specify the date when the person was born.	Yes
Division	Used to indicate the division to which the person belongs. **Note:** You can view only those divisions to which you have access in the **Division** list.	Yes
Person Since Date	Used to specify the date from when the person is the main customer.	Yes
Customer Segment	Used to indicate the market segment to which the person belongs. **Note:** This field appears when you are editing a customer registration which is created using the **C1-CustomerRegistrationBanking** business object.	Yes
Customer Tier	Used to indicate the tier of the customer segment to which the person belongs. **Note:** This field appears when you are editing a customer registration which is created using the **C1-CustomerRegistrationBanking** business object.	Yes
Access Group	Used to indicate the user group that can access the customer registration. **Note:** The **Search** (🔍) icon appears corresponding to the **Access Group** field. On clicking the **Search** icon, the **Access Group Search** window appears. On specifying the access group, the description of the access group appears corresponding to the **Access Group** field.	Yes
Immediate Refund	Used to indicate whether you want to initiate immediate refund for the person's accounts and its child persons' accounts.	No

4. Modify the required details in the **Main** section.
5. Add, edit, or remove the names of the person in the **Person Names** section.
6. Add, edit, or remove the phone details of the person in the **Person Phones** section.

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7. Add or remove the identifier details of the person in the **Person IDs** section.
8. Define, edit, or remove the address of the person in the **Contact** page, if required.
9. Define, edit, or remove characteristics of the person in the **Person Characteristics** page, if required.
10. Define, edit, or remove the person to person relationship for the person in the **Hierarchy** page, if required.
11. Add, edit, or remove the account details of the person in the **Accounts** page, if required.
12. Add, edit, or remove the policy details of the person in the **Policies** page, if required.

> **Note:** This page appears when you are editing a customer registration which is created using the **C1-CustomerRegistrationHC** business object.

13. Define, edit, or remove characteristics of the customer registration in the **Registration Characteristics** page, *if* required.
14. Click **Validate and Save**.
    The changes made to the customer registration are saved.

Related Topics

For more information on...	**See...**
How to search for a customer registration	Searching for a Customer Registration on page 507
Customer Registration - Main tab	Customer Registration - Main on page 560
Customer Registration screen	Customer Registration (Used for Viewing) on page 559
Customer Registration zone	Customer Registration on page 561
How to add name of a person for customer registration	Adding the Names of a Person on page 512
How to add the phone details of a person for customer registration	Adding the Phone Details of a Person on page 513
How to add the identifier details of a person for customer registration	Adding the Identifier Details of a Person on page 514
How to add the contact details of a person for customer registration	Adding the Contact Details of a Person on page 515
How to define a characteristic for a person	Defining a Characteristic for a Person on page 518
How to define the hierarchy of a person	Defining a Person to Person Relationship for a Person on page 519
How to add an account for a person	Adding an Account for a Person on page 522
How to add a policy for a person	Defining a Policy on page 536
How to define a characteristic for a customer registration	Defining a Characteristic for a Customer Registration on page 546

Submitting a Customer Registration

Procedure

To submit a customer registration:

1. Search for the customer registration in the **Customer Registration** screen.
2. In the **Search Results** section, click the link in the **Customer Registration Information** column *c*orresponding to the customer registration that you want to submit.

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The **Main** tab appears in the **Customer Registration** screen.

3. Click the **Submit** button in the **Customer Registration** zone.

> **Note:** The **Submit** button appears only when the customer registration is in the **Draft** status.

Related Topics

For more information on...	See...
How to search for a customer registration	Searching for a Customer Registration on page 507
Customer Registration screen	Customer Registration (Used for Viewing) on page 559
Customer Registration zone	Customer Registration on page 561

Approving a Customer Registration

You can view the number of customer registrations which are pending for an approval in the **Customer Registration** screen. The approver can review, and accordingly approve, reject, or ask the submitter to resubmit the customer registration based on the observations.

> **Note:** The system will not allow you to approve, reject or resubmit a customer registration submitted by you.

Procedure

To approve a customer registration:

1. Do either of the following:

If you want to...	Then...
Approve a customer registration through the Customer Registration screen	**a.** Search for the customer registration in the **Customer Registration** screen. **b.** In the **Search Results** section, click the link in the **Customer Registration ID** column corresponding to the customer registration which you want to review.
Approve a customer registration from the To Do List screen	**a.** Click the **Menu** link in the **Application** toolbar. A list appears. **b.** From the **Main** menu, select **To Do** and then click **To Do List**. The **To Do Type for User Search** window appears. **c.** Enter **C1-CustomerRegistration** in the **To Do Type** field. **d.** Click the **Search** button corresponding to the **To Do Type** field. **e.** Click **Search**. The **To Do Type Search** screen appears.

The **Customer Registration** screen appears.

2. Review the details in the **Customer Registration** screen.
3. If the information in the customer registration is accurate, then click the **Approve** button in the **Customer Registration** zone.

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Note: The **Approve** button appears when:

- The status of customer registration is in the **Approval In Progress**.
- A user with the approval To Do role is reviewing the customer registration.

Related Topics

For more information on...	See...
How to search for a customer registration	Searching for a Customer Registration on page 507
Customer Registration screen	Customer Registration (Used for Viewing) on page 559
Customer Registration zone	Customer Registration on page 561

Rejecting a Customer Registration

Prerequisites

To reject a customer registration, you should have:

- Reasons defined for the **Rejected** status of the **C1-CustomerRegistration** business object in the **Status Reason** screen

Note: The system will not allow you to approve, reject or resubmit a customer registration submitted by you.

Procedure

To reject a customer registration:

1. Do either of the following:

If you want to...	Then...
Reject a customer registration through the Customer Registration screen	**a.** Search for the customer registration in the **Customer Registration** screen. **b.** In the **Search Results** section, click the link in the **Customer Registration Information** column corresponding to the customer registration which you want to review.
Reject a customer registration from the To Do List screen	**a.** Click the **Menu** link in the **Application** toolbar. A list appears. **b.** From the **Main** menu, select **To Do** and then click **To Do List**. The **To Do Type for User Search** window appears. **c.** Enter **C1-CustomerRegistration** in the **To Do Type** field. **d.** Click the **Search** button corresponding to the **To Do Type** field. The **To Do List** screen appears. **e.** Select the **Open** option from the **Filter by** list to view all unassigned To Dos.

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If you want to...	Then...
	f. Click the link in the **Message** column corresponding to the To Do of the customer registration that you want to review.

The **Customer Registration** screen appears.

2. Review the details in the **Customer Registration** screen.
3. If the information in the customer registration is incorrect, then click the **Reject** button in the **Customer Registration** zone.

   The **Reject Customer Registration** window appears. It contains following fields:

Field Name	Field Description	Mandatory (Yes or No)
Status Reason	Used to indicate the reason why you want to reject the customer registration. **Note:** The list includes only those reasons which are defined for the **Rejected** status of the **C1-CustomerRegistration** business object in the **Status Reason** screen.	Yes
Comments	Used to specify additional information while rejecting the customer registration.	No

Note: The **Reject** button appears when:

- The customer registration is in the **Approval In Progress** status.
- A user with the approval To Do role is reviewing the customer registration.

4. Select the reason for rejection of the customer registration from the **Status Reason** field.
5. Click **Save**.
   The status of the customer registration is changed to **Rejected**.

Related Topics

For more information on...	See...
How to search for a customer registration	Searching for a Customer Registration on page 507
Customer Registration screen	Customer Registration (Used for Viewing) on page 559
Customer Registration zone	Customer Registration on page 561

Requesting to Resubmit a Customer Registration for Approval

Procedure

To initiate a resubmission request for a customer registration:

1. Do either of the following:

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If you want to...	Then...
Request the submitter to resubmit a customer registration through the Customer Registration screen	**a.** Search for the customer registration in the **Customer Registration** screen. **b.** In the **Search Results** section, click the link in the **Customer Registration ID** column corresponding to the customer registration which you want to review.
Request the submitter to resubmit a customer registration from the To Do List screen	**a.** Click the **Menu** link in the **Application** toolbar. A list appears. **b.** From the **Main** menu, select **To Do** and then click **To Do List**. The **To Do Type for User Search** window appears. **c.** Enter **C1-CustomerRegistration** in the **To Do Type** field. **d.** Click the **Search** button corresponding to the **To Do Type** field. The **To Do List** screen appears. **e.** Select the **Open** option from the **Filter by** list to view all unassigned To Dos. **f.** Click the link in the **Message** column corresponding to the To Do of the customer registration that you want to review.

The **Customer Registration** screen appears.

2. Review the details in the **Customer Registration** screen.
3. If the information in the customer registration is incomplete and you want the submitter to make the required changes and resubmit the customer registration for approval, then click the **Re Submit** button in the **Customer Registration** zone.

   The **Resubmit Customer Registration** window appears. It contains the following field:

Field Name	Field Description	Mandatory (Yes or No)
Comments	Used to specify the changes which the submitter should make in the customer registration before resubmitting it for approval.	Yes

Note: The **Re Submit** button appears when:

- The customer registration is in the **Approval In Progress** status.
- A user with the approval To Do role is reviewing the customer registration.

4. Enter the comments in the respective field and then click **Save**.
   A To Do is created using the submitter To Do type and assigned to all users with a submitter To Do role specified in the customer registration type. In addition, the status of the customer registration is changed to **Draft**.

Related Topics

For more information on...	See...
How to search for a customer registration	Searching for a Customer Registration on page 507
Customer Registration screen	Customer Registration (Used for Viewing) on page 559

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For more information on...	See...
Customer Registration zone	Customer Registration on page 561

Viewing the Log of a Customer Registration

Procedure

To view the log of a customer registration:

1. Search for the customer registration in the **Customer Registration** screen.
2. In the **Search Results** section, click the link in the **Customer Registration Information** column *c*orresponding to the customer registration whose log you want to view.
   The **Main** tab appears in the **Customer Registration** screen.
3. Click the **Log** tab.
   The **Log** tab appears.
4. View the complete trail of actions performed on the customer registration in the **Customer Registration Log** zone.

Related Topics

For more information on...	See...
How to search for a customer registration	Searching for a Customer Registration on page 507
Customer Registration - Main tab	Customer Registration - Main on page 560
Customer Registration screen	Customer Registration (Used for Viewing) on page 559
Customer Registration - Log tab	Customer Registration - Log on page 576
Customer Registration Log zone	Customer Registration Log on page 576

Adding a Log Entry for a Customer Registration

Procedure

To add a log entry for a customer registration:

1. Search for the customer registration in the **Customer Registration** screen.
2. In the **Search Results** section, click the link in the **Customer Registration Information** column *c*orresponding to the customer registration for which you want to add a log entry.
   The **Main** tab appears in the **Customer Registration** screen.
3. Click the **Log** tab.
   The **Log** tab appears.
4. Click the **Add Log Entry** link in the upper right corner of the **Customer Registration Log** zone.

   The **Add Request Log** screen appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Request Information	Displays the concatenated string of information about the customer registration separated by a comma (,).	Not applicable
Log Details	Used to specify the reason for adding a log entry for the customer registration.	Yes

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5. Enter the required details in the **Log Details** field.
6. Click **Save**.
   The log entry is added for the **Customer Registration Log** zone.

Related Topics

For more information on...	**See...**
How to search for a customer registration	Searching for a Customer Registration on page 507
Customer Registration - Main tab	Customer Registration - Main on page 560
Customer Registration screen	Customer Registration (Used for Viewing) on page 559
Customer Registration - Log tab	Customer Registration - Log on page 576
Customer Registration Log zone	Customer Registration Log on page 576

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Chapter 9

Customer 360° View

Topics:

- Prerequisites
- Customer 360° View
- Customer 360° Information
- Bill Information
- Pricing Rule (Used for Viewing)

Oracle Revenue Management and Billing provides a new screen named **Customer 360° View** which enables you to quickly view in-depth information about the person. This screen can be used to view the 360° information of a person who is associated with the fully-insured group or self-funded policy. It provides the following information:

- Basic details, characteristics, child persons, person hierarchy, person billing hierarchy, and the customer contacts of the person.
- Customer registration objects through which the bill groups are created for a parent customer.
- List of accounts to which the parent customer and its bill groups are associated.
- Basic details, characteristics, administrative contracts, automatic payment options, billing and adjustment summary, financial and collections summary, and unpaid bills of the person's account.
- Consolidated view of the transactions (such as, billing, payment, payment cancellation, adjustment, adjustment cancellation, automatic payments sent to the auto clearing house for review, refund, write off, excess credit, and reconciliation) which are carried out for the person's account.
- List of policies to which the parent customer or bill group is associated. The system lists those policies where the policy category is set to **Self-Funded** and **Fully Insured Group**.
- Basic details, related persons, and policy plans in the person's policy.
- Basic and in-depth details of the pricing rules which are defined for a parent customer who is associated with the fully-insured group or self-funded policy.
- Basic and in-depth details of the pricing rules which are defined for a self-funded policy of a bill group.
- Basic details of the pricing groups which are defined for a bill group who is associated with the self-funded policy.
- Basic and in-depth details of the pricing rules which are defined for a fully-insured group policy.
- Basic and in-depth details of the pricing rules which are defined for a fully-insured group policy plan.
- Basic and in-depth details of the pricing rules which are defined for the states where the fully-insured group policy and its plans and memberships are issued.
- Basic details of the approval transactions which are created while defining, editing, and deleting the pricing rules for the self-funded or fully-insured group business.
- Basic details of the bill, adjustments which are swept onto the bill, activities (such as, payment, offset, refund, write off, or transfer) through which the bill is settled, high-level summary and details of the bill segments which

are included in the bill, active hold requests due to which the bill is kept on hold, offset requests through which the bill is offset against another bill, and refund and write off requests through which the bill or its bill segment is either refunded or written off.

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

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Prerequisites

To setup the **Customer 360° View** feature, you need to do the following:

- Define the required divisions, customer classes, person types, person identifier types, account identifier types, policy types, and policy person roles in the system
- Define values for the **C1-SourceSystemLookup** extendable lookup
- Define the required characteristic types where the characteristic entity is set to **Person**
- Define the required characteristic types where the characteristic entity is set to **Account**
- Define the required characteristic types where the characteristic entity is set to **Policy**
- Define values for the **Administrative Contract Type** and **On Account Contract Type** option types in the **C1_CMO** feature configuration

  Note: This prerequisite is not required when you are viewing the 360° information of a person who is associated with the self-funded policy.
- Define values for **Premium Amount SQI** and **Coverage End Date SQI** option types in the **C1-BILLADJSQ** feature configuration

  Note: This prerequisite is not required when you are viewing the 360° information of a person who is associated with the self-funded policy.
- Define value for the **Person Relationship Type** option type in the **C1-ASOBLLNG** feature configuration

Related Topics

For more information on...	See...
How to setup the **C1_CMO** feature configuration	Setting the C1_CMO Feature Configuration on page 4439
How to setup the **C1-ASOBLLNG** feature configuration	Setting the C1-ASOBLLNG Feature Configuration on page 4417
How to setup the **C1-BILLADJSQ** feature configuration	Setting the C1-BILLADJSQ Feature Configuration on page 4438

Customer 360° View

The **Customer 360° View** screen allows you to search for a person, its accounts, and policies using various search criteria. It contains the following zone:

- 360° Search on page 589

360° Search

The **360° Search** zone allows you to search for a person, account, and policy using various search criteria. It contains the following two sections:

- **Search Criteria** - The **Search Criteria** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Search By	Used to indicate whether you want to search for a person, account, or policy. The valid values are:	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	• Policy • Person • Account **Note:** By default, the **Policy** option is selected.	
Policy Type	Used to search policies which are created using a particular policy type. **Note:** This field appears when the **Policy** option is selected from the **Search By** list.	No
Source System	Used to search policies which were created in a particular external system. **Note:** This field appears when the **Policy** option is selected from the **Search By** list.	No
Policy Number	Used to search a policy with a particular policy number. **Note:** This field appears when the **Policy** option is selected from the **Search By** list.	No
Policy ID	Used to search a particular policy. **Note:** This field appears when the **Policy** option is selected from the **Search By** list.	No
Policy Person Role	Used to search policies where a person is assigned a particular person role. **Note:** This field appears when the **Policy** option is selected from the **Search By** list.	No
Person Name	Used to search a particular person using its primary or secondary name. If you specify the person name while searching for an account, the system searches all accounts where the person is the main customer. However, if you specify the person name while searching for a policy, the system searches all policies where the person is the main customer. **Note:** This field appears when: • The **Policy** or **Person** option is selected from the **Search By** list. • The **Account** option is selected from the **Search By** list and the **Advanced Search** link available in the right side of the **360° Search** zone is clicked.	Yes (Conditional) **Note:** This field is required when you are searching for a policy using the policy person role.
Status	Used to search policies with a particular status. The valid values are:	No

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Field Name	Field Description	Mandatory (Yes or No)
	• In Force/Active • Canceled • Pending Cancellation • Pending • Pending Reinstatement • Pending Termination • Post Runout • Reinstated • Runout • Terminated **Note:** This field appears when the **Policy** option is selected from the **Search By** list.	
Start Date	Used to search policies which are effective from a particular date. **Note:** This field appears when the **Policy** option is selected from the **Search By** list and the **Advanced Search** link available in the right side of the **360° Search** zone is clicked.	No
End Date	Used to search policies which are effective till a particular date. **Note:** This field appears when the **Policy** option is selected from the **Search By** list and the **Advanced Search** link available in the right side of the **360° Search** zone is clicked.	No
Characteristic Type	Used to search persons, accounts, or policies with a particular type of characteristic. **Note:** This field appears when the **Advanced Search** link available in the right side of the **360° Search** zone is clicked.	No
Characteristic Value	Used to search persons, accounts, or policies with a particular characteristic. **Note:** This field appears when you are searching for a person, account, or policy using the characteristic type. On specifying the value for a predefined characteristic type, the description of the characteristic value appears corresponding to the **Characteristic Value** field.	Yes (Conditional) **Note:** If you specify the characteristic type as a search criteria, you have to enter the characteristics value.
Division	Used to search persons or accounts which belong to a particular division.	No

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Field Name	Field Description	Mandatory (Yes or No)
	Note: This field appears when the **Person** or **Account** option is selected from the **Search By** list.	
Customer Class	Used to search accounts or persons' whose accounts belong to a particular customer class. **Note:** This field appears when the **Person** or **Account** option is selected from the **Search By** list.	No
Person ID	Used to search a particular person. **Note:** This field appears when the **Person** option is selected from the **Search By** list.	No
Person Identifier Type	Used to indicate the person identifier type based on which you want to search for a person. **Note:** This field appears when the **Person** option is selected from the **Search By** list.	Yes (Conditional) **Note:** If you specify the person identifier as a search criteria, you have to select the person identifier type.
Person Identifier	Used to search a person with a particular identifier. **Note:** This field appears when the **Person** option is selected from the **Search By** list.	Yes (Conditional) **Note:** If you specify the person identifier type as a search criteria, you have to enter the person identifier.
Person Type	Used to search persons of a particular type. The valid values are: • Business • Bill Group • Group • Broker • Person • Parent Customer **Note:** This field appears when the **Person** option is selected from the **Search By** list and the **Advanced Search** link available in the right side of the **360° Search** zone is clicked.	No
Address	Used to search persons with a particular address or accounts' whose main customer has a particular address. **Note:** This field appears when the **Person** or **Account** option is selected from the **Search By** list and the **Advanced Search** link available in the right side of the **360° Search** zone is clicked.	No

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Field Name	Field Description	Mandatory (Yes or No)
City	Used to search persons who belong to a particular city or accounts' whose main customer belongs to a particular city. **Note:** This field appears when the **Person** or **Account** option is selected from the **Search By** list and the **Advanced Search** link available in the right side of the **360° Search** zone is clicked.	No
Skip Months	Used to search accounts for which the skip months are defined through a billing preference. **Note:** You can set the billing preference for an account through a characteristic type which is specified in the **Bill Cycle Rule Code** option type of the **C1-ASOBLLNG** feature configuration. The system enables you to define, edit, delete, and copy a billing preference through the **Field Mapping** screen. For more information, see Defining a Billing Preference on page 3617. This field appears when the **Account** option is selected from the **Search By** list and the **Advanced Search** link available in the right side of the **360° Search** zone is clicked.	No
Phone Number	Used to search a person with a particular phone number or accounts' whose main customer has a particular phone number. **Note:** This field appears when the **Person** or **Account** option is selected from the **Search By** list and the **Advanced Search** link available in the right side of the **360° Search** zone is clicked.	No
Account ID	Used to search a particular account. **Note:** This field appears when the **Account** option is selected from the **Search By** list.	No
Account Identifier Type	Used to indicate the account identifier type based on which you want to search for an account. **Note:** This field appears when the **Account** option is selected from the **Search By** list.	Yes (Conditional) **Note:** If you specify the account identifier as a search criteria, you have to select the account identifier type.
Account Identifier	Used to search an account with a particular identifier.	Yes (Conditional)

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Field Name	Field Description	Mandatory (Yes or No)
	Note: This field appears when the **Account** option is selected from the **Search By** list.	**Note:** If you specify the account identifier type as a search criteria, you have to enter the account identifier.

Note:

You must specify at least one search criterion while searching for a person, account, or policy. One more search criterion is required when you are searching for a person or account using the division and/or customer class. Similarly, one more search criterion is required when you are searching for a policy using the policy type and/or source system.

If you have specified any other search criterion along with the person ID, account ID, or policy ID, the system ignores the additional search criterion and searches using the person ID, account ID, or policy ID, respectively.

- **Search Results** - On clicking the **Search** button, the search results appear based on the specified search criteria. The **Search Results** section contains the following columns:

Column Name	Column Description
Policy Information	Displays information about the policy. **Note:** It has a link. On clicking the link, the **Policy** screen appears where you can view the details of the respective policy. This column appears when the **Policy** option is selected from the **Search By** list.
Main Customer	Indicates the main customer of the policy or account. **Note:** This column appears when the **Policy** or **Account** option is selected from the **Search By** list.
Source System	Displays the name of the external system in which the policy was created. **Note:** This column appears when the **Policy** option is selected from the **Search By** list.
Policy Number	Displays the policy number. **Note:** This column appears when the **Policy** option is selected from the **Search By** list.
Start Date	Displays the date from when the policy is effective. **Note:** This column appears when the **Policy** option is selected from the **Search By** list.
End Date	Displays the date till when the policy is effective. **Note:** This column appears when the **Policy** option is selected from the **Search By** list.

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Column Name	Column Description
Status	Indicates the status of the policy. The valid values are: • In Force/Active • Canceled • Pending Cancellation • Pending • Pending Reinstatement • Pending Termination • Post Runout • Reinstated • Runout • Terminated **Note:** This column appears when the **Policy** option is selected from the **Search By** list.
Person Information	Displays information about the person. In addition, this column has a context menu which helps in navigating to other screens in the application. **Note:** It has a link. On clicking the link, the **Person** screen appears where you can view the details of the respective person. This column appears when the **Person** option is selected from the **Search By** list.
Person Name	Displays the name of the person. **Note:** This column appears when the **Person** option is selected from the **Search By** list.
Person Type	Indicates the type of the person. The valid values are: • Business • Bill Group • Group • Broker • Person • Parent Customer **Note:** This column appears when the **Person** option is selected from the **Search By** list.
Primary Person Identifier Type	Indicates the primary identifier type associated with the person. **Note:** This column appears when the **Person** option is selected from the **Search By** list.
Primary Person Identifier	Displays the primary person identifier. **Note:** This column appears when the **Person** option is selected from the **Search By** list.

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Column Name	Column Description
Account Information	Displays information about the account. In addition, this column has a context menu which helps in navigating to other screens in the application.
	Note: It has a link. On clicking the link, the **Account** screen appears where you can view the details of the respective account. This column appears when the **Account** option is selected from the **Search By** list.
Division	Indicates the division to which the account belongs.
	Note: This column appears when the **Account** option is selected from the **Search By** list.
Customer Class	Indicates the customer class to which the account belongs.
	Note: This column appears when the **Account** option is selected from the **Search By** list.
Primary Account Identifier Type	Indicates the primary identifier type associated with the account.
	Note: This column appears when the **Account** option is selected from the **Search By** list.
Primary Account Identifier	Displays the primary account identifier.
	Note: This column appears when the **Account** option is selected from the **Search By** list.
Current Balance	Displays the total amount of funds in the account.
	Note: This column appears when the **Account** option is selected from the **Search By** list.
Also Known As	Displays the non-primary names of the person separated by semi-colon (;).
	Note: This column appears when the **Person** option is selected from the **Search By** list.

Note:

You can view the 360° information of the person, account, or policy by clicking the **View** (🔗) icon corresponding to the record in the **Search Results** section.

Pagination is used to display limited number of records in the **Search Results** section. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

Related Topics

For more information on...	See...
How to search for a person	Searching for a Person on page 597
How to search for an account	Searching for an Account on page 598

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For more information on...	See...
How to search for a policy	Searching for a Policy on page 599
How to view the 360° information of a person	Viewing the 360° Information of a Person on page 600
How to view the 360° information of an account	Viewing the 360° Information of an Account on page 601
How to view the 360° information of a policy	Viewing the 360° Information of a Policy on page 603

Searching for a Person

Prerequisites

To search for a person, you should have:

- Divisions, customer classes, person types, and person identifier types defined in the application
- Characteristic types defined in the application (where the characteristic entity is set to **Person**)

Procedure

To search for a person:

1. Click the **Menu** link in the **Application** toolbar.
   A list appears.
2. From the **Main** menu, click **Customer Management** and then click **Customer 360° View**.
   The **Customer 360° View** screen appears.
3. Select the **Person** option from the **Search By** list to indicate that you want to search for a person.
4. Enter the required search criteria in the **360° Search** zone.

Note:

You must specify at least one search criterion while searching for a person. One more search criterion is required when you are searching for a person using the division and/or customer class.

The criteria are grouped as indicated by line separators between the criteria. Each group is independent from the other, and only one group is used at a time for searching. If you enter criteria in more than one group, the criteria from the former group is used for searching. For example, if you enter the person name (in the second criteria group) and person identifier (in the fourth criteria group), the system searches using the person name instead of the person identifier.

You must specify division and/or customer class when you are searching for a person using the city.

You must specify division, customer class, or any other criteria in the second group when you are searching for a person using the person type.

If you have specified any other search criterion along with the person ID, the system ignores the additional search criterion and searches for the person using the person ID.

ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.

The **Advanced Search** link appears in the right side of the **360° Search** zone. On clicking the **Advanced Search** link, additional fields appear in the zone which help you to refine the search.

If you select a predefined characteristic type, the **Search** (🔍) icon appears corresponding to the **Characteristic Value** field. On clicking the **Search** icon, you can search for a predefined characteristic value.

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5. Click **Search**.
   A list of persons that meet the search criteria appears in the **Search Results** section.

Related Topics

For more information on...	See...
Customer 360° View screen	Customer 360° View on page 589
360° Search zone	360° Search on page 589

Searching for an Account

Prerequisites

To search for an account, you should have:

- Divisions, customer classes, and account identifier types defined in the application
- Characteristic types defined in the application (where the characteristic entity is set to **Account**)

Procedure

To search for an account:

1. Click the **Menu** link in the **Application** toolbar.
   A list appears.
2. From the **Main** menu, click **Customer Management** and then click **Customer 360° View**.
   The **Customer 360° View** screen appears.
3. Select the **Account** option from the **Search By** list to indicate that you want to search for an account.
4. Enter the required search criteria in the **360° Search** zone.

> **Note:**
>
> You must specify at least one search criterion while searching for an account. One more search criterion is required when you are searching for an account using the division and/or customer class.
>
> The criteria are grouped as indicated by line separators between the criteria. Each group is independent from the other, and only one group is used at a time for searching. If you enter criteria in more than one group, the criteria from the former group is used for searching. For example, if you enter the person name (in the fourth criteria group) and account identifier (in the third criteria group), the system searches using the account identifier instead of the person name.
>
> You must specify division and/or customer class when you are searching for an account using the city.
>
> If you have specified any other search criterion along with the account ID, the system ignores the additional search criterion and searches for the account using the account ID.
>
> ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.
>
> The **Advanced Search** link appears in the right side of the **360° Search** zone. On clicking the **Advanced Search** link, additional fields appear in the zone which help you to refine the search.
>
> If you select a predefined characteristic type, the **Search** (🔍) icon appears corresponding to the **Characteristic Value** field. On clicking the **Search** icon, you can search for a predefined characteristic value.

5. Click **Search**.
   A list of accounts that meet the search criteria appears in the **Search Results** section.

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Related Topics

For more information on...	See...
Customer 360° View screen	Customer 360° View on page 589
360° Search zone	360° Search on page 589

Searching for a Policy

Prerequisites

To search for a policy, you should have:

- Policy types and policy person roles defined in the application
- Values defined for the **C1-SourceSystemLookup** extendable lookup
- Characteristic types defined in the application (where the characteristic entity is set to **Policy**)

Procedure

To search for a policy:

1. Click the **Menu** link in the **Application** toolbar.
   A list appears.
2. From the **Main** menu, click **Customer Management** and then click **Customer 360° View**.
   The **Customer 360° View** screen appears.
3. Select the **Policy** option from the **Search By** list to indicate that you want to search for a policy.
4. Enter the required search criteria in the **360° Search** zone.

   Note:

   You must specify at least one search criterion while searching for a policy. One more search criterion is required when you are searching for a policy using the policy type and/or source system.

   If you have specified any other search criterion along with the policy ID, the system ignores the additional search criterion and searches for the policy using the policy ID.

   You must specify the person name when you are searching for a policy using the policy person role.

   ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.

   The **Advanced Search** link appears in the right side of the **360° Search** zone. On clicking the **Advanced Search** link, additional fields appear in the zone which help you to refine the search.

   If you select a predefined characteristic type, the **Search** (🔍) icon appears corresponding to the **Characteristic Value** field. On clicking the **Search** icon, you can search for a predefined characteristic value.

5. Click **Search**.
   A list of policies that meet the search criteria appears in the **Search Results** section.

Related Topics

For more information on...	See...
Customer 360° View screen	Customer 360° View on page 589
360° Search zone	360° Search on page 589

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Viewing the 360° Information of a Person

Prerequisites

To view the 360° information of a person, you should have:

- Value defined for the **Person Relationship Type** option type in the **C1-ASOBLLNG** feature configuration

Procedure

To view the 360° information of a person:

1. Search for the person in the **Customer 360° View** screen.
2. In the **Search Results** section, click the **View** (🔗) icon corresponding to the person whose details you want *t*o view.

   The **Person** tab appears in the **Customer 360° Information** screen. It contains the following zones:

   - Person Information on page 610
   - Additional Attributes on page 612
   - Child Persons on page 613
   - Person Hierarchy on page 613

     Note: The **Person Hierarchy** zone does not appear when you are viewing the 360° information of a person whose person type is set to **Parent Customer**.
   - Person Billing Hierarchy on page 614

     Note: The **Person Billing Hierarchy** zone appears when you are viewing the 360° information of a person whose person type is set to **Parent Customer**.
   - Bill Group Derivation and Pricing Parameters on page 616

     Note: The **Bill Group Derivation and Pricing Parameters** zone appears when you are viewing the 360° information of a person whose person type is set to **Parent Customer**.
   - Bill Group Sorting on page 618

     Note: The **Bill Group Sorting** zone appears when you are viewing the 360° information of a person whose person type is set to **Parent Customer**.
   - Customer Contacts on page 619
   - Bill Groups Created Via Customer Registration on page 620

     Note: The **Bill Groups Created Via Customer Registration** zone appears when you are viewing the 360° information of a person whose person type is set to **Parent Customer**.
3. View the basic details of the person in the **Person Information** zone.
4. View the characteristics of the person in the **Person Characteristics** zone.
5. View the child persons included in the person's hierarchy in the **Child Persons** zone.
6. View the accounts and policies where the person is the main customer and memberships where the person is the *m*ain subscriber in the **Person Hierarchy** zone.
7. View the parent customer's accounts and policies and its bill groups' accounts and policies in the **Person Billing Hierarchy** zone.
8. View the derivation and pricing parameters defined for the bill group and sort ID combinations in the **Bill Group Derivation and Pricing Parameters** zone.
9. View the sort IDs defined for the bill groups in the **Bill Group Sorting** zone.
10. View how and when the person was contacted in the **Customer Contacts** zone.
11. View the customer registration objects through which the bill groups are created for the parent customer in the **Bill Groups Created Via Customer Registration** zone.

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12. If required, you can view the details of the account to which the person is associated in the **Account** tab.

> **Note:**
>
> If you are viewing the 360° information of a parent customer, the following zones appears in the **Account** tab when you click the **Broadcast** (ᯤ) icon corresponding to the account in the Account List on page 622 zone:
>
> - Account Information on page 623
> - Auto Pay Details on page 625
> - Account Characteristics on page 624
> - Account Financial and Collections Summary on page 626
> - Open Bills on page 627
> - Billed Vs Paid on page 629
> - Timeline on page 631
> - Trial Bills on page 634

13. If required, you can view the details of the policy to which the person is associated in the **Policy** tab.
14. If required, you can view the pricing information of the parent customer or its bill groups in the **Pricing Information** tab.

Related Topics

For more information on...	**See...**
How to search for a person	Searching for a Person on page 597
Customer 360° Information screen	Customer 360° Information on page 607
Person tab	Customer 360° Information - Person on page 609
Account tab	Customer 360° Information - Account on page 620
Policy tab	Customer 360° Information - Policy on page 634
Pricing Information tab	Customer 360° Information - Pricing Information on page 641
How to view the pricing information of a parent customer	Viewing the Pricing Information of a Parent Customer on page 603
How to view the pricing information of a bill group	Viewing the Pricing Information of a Bill Group on page 605
How to setup the **C1-ASOBLLNG** feature configuration	Setting the C1-ASOBLLNG Feature Configuration on page 4417

Viewing the 360° Information of an Account

Prerequisites

To view the 360° information of an account, you should have:

- Value defined for the **Person Relationship Type** option type in the **C1-ASOBLLNG** feature configuration
- Values defined for the **Administrative Contract Type** and **On Account Contract Type** option types in the **C1_CMO** feature configuration
- Values defined for the **Premium Amount SQI** and **Coverage End Date SQI** option types in the **C1-BILLADJSQ** feature configuration

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Note: The latter two prerequisites are not required when you are viewing the 360° information of a person who is associated with the self-funded policy.

Procedure

To view the 360° information of an account:

1. Search for the account in the **Customer 360° View** screen.
2. In the **Search Results** section, click the **View** (🔗) icon corresponding to the account whose details you want *t*o view.

   The **Account** tab appears in the **Customer 360° Information** screen. It contains the following zones:

   - Account List on page 622

     Note: The **Account List** zone appears when you are viewing the 360° information of a person whose person type is set to **Parent Customer**.
   - Account Information on page 623
   - Auto Pay Details on page 625
   - Account Characteristics on page 624
   - Administrative Contracts on page 625

     Note: The **Administrative Contracts** zone appears when you are viewing the 360° information of a person whose person type is neither **Parent Customer** nor **Bill Group**.
   - Account Financial and Collections Summary on page 626
   - Billing and Adjustment Summary on page 627

     Note: The **Billing and Adjustment Summary** zone appears when you are viewing the 360° information of a person whose person type is neither **Parent Customer** nor **Bill Group**.
   - Open Bills on page 627
   - Billed Vs Paid on page 629
   - Timeline on page 631
   - Trial Bills on page 634
3. View the accounts of the parent customer and its bill groups in the **Account List** zone.
4. View the basic details of the account in the **Account Information** zone.
5. View the automatic payment options defined for the account in the **Auto Pay Details** zone.
6. View the characteristics of the account in the **Account Characteristics** zone.
7. View the account's contracts which should be monitored closely for various administrative reasons in the **Administrative Contracts** zone.
8. View the financial and collection details of the account in the **Account Financial and Collections Summary** zone.
9. View the billing and adjustment summary of the account in the **Billing and Adjustment Summary** zone.
10. View the unpaid bills of the account in the **Open Bills** zone.
11. View various transactions of the account, such as bills, payments, adjustments, reconciliations, and so on, in the **Billed Vs Paid** zone.
12. View the number of customer contacts, bills, and payments created for the account in a particular month in the **Timeline** zone.
13. View the trial bills which are created for the account in the **Trial Bills** zone.

Related Topics

For more information on...	**See...**
How to search for an account	Searching for an Account on page 598
Customer 360° Information screen	Customer 360° Information on page 607

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For more information on...	See...
Account tab	Customer 360° Information - Account on page 620
How to setup the **C1_CMO** feature configuration	Setting the C1_CMO Feature Configuration on page 4439
How to setup the **C1-ASOBLLNG** feature configuration	Setting the C1-ASOBLLNG Feature Configuration on page 4417
How to setup the **C1-BILLADJSQ** feature configuration	Setting the C1-BILLADJSQ Feature Configuration on page 4438

Viewing the 360° Information of a Policy

Procedure

To view the 360° information of a policy:

1. Search for the policy in the **Customer 360° View** screen.
2. In the **Search Results** section, click the **View** (🔗) icon corresponding to the policy whose details you want *t*o view.

   The **Policy** tab appears in the **Customer 360° Information** screen. It contains the following zones:

   - Policy List on page 635

     Note: The **Policy List** zone appears when there is more than one policy associated with the person.
   - Policy Information on page 636
   - Policy Persons on page 640
   - Policy Plans on page 640

     Note: The **Policy Plans** zone appears when you are viewing the 360° information of a person who is associated with the fully-insured group policy.
3. View the list of policies associated with the person in the **Policy List** zone.
4. View the basic details of the policy in the **Policy Information** zone.
5. View the persons associated with the policy in the **Policy Persons** zone.
6. View the plans defined in the policy in the **Policy Plans** zone.

Related Topics

For more information on...	See...
How to search for a policy	Searching for a Policy on page 599
Customer 360° Information screen	Customer 360° Information on page 607
Policy tab	Customer 360° Information - Policy on page 634

Viewing the Pricing Information of a Parent Customer

Prerequisites

To view the pricing information of a parent customer, you should have:

- Value defined for the **Person Relationship Type** option type in the **C1-ASOBLLNG** feature configuration

Procedure

To view the pricing information of a parent customer:

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1. Search for a person whose person type is set to **Parent Customer** in the **Customer 360° View** screen.
2. In the **Search Results** section, click the **View** (🔗) icon corresponding to the person whose details you want *t*o view. The **Person** tab appears in the **Customer 360° Information** screen.
3. Click the **Pricing Information** tab.

   The **Pricing Information** tab appears. It contains the following zones:

   - Parent Customer Pricing Rules on page 643

     Note: The **Parent Customer Pricing Rules** zone appears when you are viewing 360° information of a parent customer or bill group who is associated with the self-funded policy.
   - Bill Group Self-Funded Policy Pricing Rule Summary on page 646

     Note: The **Bill Group Self-Funded Policy Pricing Rule Summary** zone appears when you are viewing 360° information of a parent customer who is associated with the self-funded policy.
   - Bill Group Self-Funded Policy Information on page 648

     Note: The **Bill Group Self-Funded Policy Information** zone appears when you are viewing 360° information of a parent customer or bill group who is associated with the self-funded policy.
   - Bill Group Self-Funded Policy Pricing Rules on page 649

     Note: The **Bill Group Self-Funded Policy Pricing Rules** zone appears when you are viewing 360° information of a parent customer or bill group who is associated with the self-funded policy.
   - Fully-Insured Pricing Rules on page 654

     Note: The **Fully-Insured Pricing Rules** zone appears when you are viewing 360° information of a parent customer or bill group who is associated with the fully-insured group policy.
   - Pricing Rule Summary on page 656

     Note: The **Pricing Rule Summary** zone appears when you are viewing 360° information of a parent customer who is associated with the fully-insured group policy.
   - Pricing Rule Approval Transactions on page 656

     Note: The **Pricing Rule Approval Transactions** zone appears when you are viewing 360° information of a parent customer or bill group who is associated with the fully-insured group or self-funded policy.
4. Do either of the following:

If you are viewing 360° information of...	**Then...**
A parent customer who is associated with a self-funded policy	**a.** View the pricing rules which are defined for the parent customer in the **Parent Customer Pricing Rules** zone. **b.** View the list of pricing rules which are defined for the self-funded policies of the bill groups in a tree structure in the **Bill Group Self-Funded Policy Pricing Rule Summary** zone. **c.** View the details of the policies to which a bill group is associated in the **Bill Group Self-Funded Policy Information** zone. **d.** View the details of the pricing rules which are defined for a policy of a bill group in the **Bill Group Self-Funded Policy Pricing Rules** zone. **e.** View the details of the pricing groups which are defined for a bill group in the **Bill Group Pricing Groups** zone. **f.** View the approval transactions which are created while defining, editing, or deleting a pricing rule of the parent customer and its bill groups in the **Pricing Rule Approval Transactions** zone.

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If you are viewing 360° information of...	Then...
A parent customer who is associated with a fully-insured group policy	**a.** View the pricing rules which are defined for different entities (such as parent customer, fully-insured group policy, policy plan, and state of issue) in the **Fully-Insured Pricing Rules** zone. **b.** View the list of pricing rules which are defined for the parent customer, fully-insured group policies, and policy plans in a tree structure in the **Pricing Rule Summary** zone. **c.** View the approval transactions which are created while defining, editing, or deleting a pricing rule for different entities in the **Pricing Rule Approval Transactions** zone.

Related Topics

For more information on...	See...
How to search for a person	Searching for a Person on page 597
Customer 360° Information screen	Customer 360° Information on page 607
Pricing Information tab	Customer 360° Information - Pricing Information on page 641
How to setup the **C1-ASOBLLNG** feature configuration	Setting the C1-ASOBLLNG Feature Configuration on page 4417

Viewing the Pricing Information of a Bill Group

Prerequisites

To view the pricing information of a bill group, you should have:

- Value defined for the **Person Relationship Type** option type in the **C1-ASOBLLNG** feature configuration

Procedure

To view the pricing information of a bill group:

1. Search for a person whose person type is set to **Bill Group** in the **Customer 360° View** screen.
2. In the **Search Results** section, click the **View** (🔗) icon corresponding to the person whose details you want *t*o view. The **Person** tab appears in the **Customer 360° Information** screen.
3. Click the **Pricing Information** tab.

   The **Pricing Information** tab appears. It contains the following zones:

   - Parent Customer Pricing Rules on page 643

     Note: The **Parent Customer Pricing Rules** zone appears when you are viewing 360° information of a parent customer or bill group who is associated with the self-funded policy.

   - Parent Customer Pricing Rule Summary on page 647

     Note: The **Parent Customer Pricing Rule Summary** zone appears when you are viewing 360° information of a bill group who is associated with the self-funded policy.

   - Bill Group Self-Funded Policy Information on page 648

     Note: The **Bill Group Self-Funded Policy Information** zone appears when you are viewing 360° information of a parent customer or bill group who is associated with the self-funded policy.

   - Bill Group Self-Funded Policy Pricing Rules on page 649

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> **Note:** The **Bill Group Self-Funded Policy Pricing Rules** zone appears when you are viewing 360° information of a parent customer or bill group who is associated with the self-funded policy.

- Bill Group Pricing Groups on page 653

> **Note:** The **Bill Group Pricing Groups** zone appears when you are viewing 360° information of a bill group who is associated with the self-funded policy.

- Fully-Insured Pricing Rules on page 654

> **Note:** The **Fully-Insured Pricing Rules** zone appears when you are viewing 360° information of a parent customer or bill group who is associated with the fully-insured group policy.

- Pricing Rule Approval Transactions on page 656

> **Note:** The **Pricing Rule Approval Transactions** zone appears when you are viewing 360° information of a parent customer or bill group who is associated with the fully-insured group or self-funded policy.

4. Do either of the following:

If you are viewing 360° information of...	Then...
A bill group who is associated with a self-funded policy	**a.** View the pricing rules which are defined for the parent customer in the **Parent Customer Pricing Rules** zone. **b.** View the information about the parent customer and its pricing rules in a tree structure in the **Parent Customer Pricing Rule Summary** zone. **c.** View the details of the policies to which the bill group is associated in the **Bill Group Self-Funded Policy Information** zone. **d.** View the details of the pricing rules which are defined for a policy of the bill group in the **Bill Group Self-Funded Policy Pricing Rules** zone. **e.** View the details of the pricing groups which are defined for the bill group in the **Bill Group Pricing Groups** zone. **f.** View the approval transactions which are created while defining, editing, or deleting the pricing rules of the bill group in the **Pricing Rule Approval Transactions** zone.
A bill group who is associated with a fully-insured group policy	**a.** View the pricing rules which are defined for different entities (such as parent customer, fully-insured group policy, policy plan, and state of issue) in the **Fully-Insured Pricing Rules** zone. **b.** View the approval transactions which are created while defining, editing, or deleting a pricing rule for different entities in the **Pricing Rule Approval Transactions** zone.

Related Topics

For more information on...	See...
How to search for a person	Searching for a Person on page 597
Customer 360° Information screen	Customer 360° Information on page 607
Pricing Information tab	Customer 360° Information - Pricing Information on page 641
How to setup the **C1-ASOBLLNG** feature configuration	Setting the C1-ASOBLLNG Feature Configuration on page 4417

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Customer 360° Information

The following table provides information about the **Customer 360° Information** screen:

If you are viewing the 360° information of...	Then
A parent customer who is associated with the self-funded policy	The **Customer 360° Information** screen allows you to view: • Basic details, characteristics, child persons, billing hierarchy, and customer contacts of the parent customer. • Sort IDs of all effective child persons whose person type is set to **Bill Group** and who are related to the parent customer using a relationship type which is specified in the **Person Relationship Type** option type of the **C1-ASOBLLNG** feature configuration. • Derivation and pricing parameters defined for the bill group and sort ID combinations. • Customer registration objects through which the bill groups are created for the parent customer. • Accounts of all effective child persons whose person type is set to **Bill Group** and who are related to the parent customer using a relationship type which is specified in the **Person Relationship Type** option type of the **C1-ASOBLLNG** feature configuration. • Basic details, characteristics, automatic payment options, financial and collections summary, and unpaid bills of a particular bill group's account. • List of self-funded policies to which the parent customer's bill groups are associated. • Basic details and policy persons of a self-funded policy where the parent customer is the policy holder. • Basic details of the pricing rules which are defined for the parent customer. • Summarized tree view listing each bill group of the parent customer and the bill groups' self-funded policies and pricing rules. • Basic details of the self-funded policies which are associated with each bill group of the parent customer. • Basic details of the pricing rules which are defined for the self-funded policies of each bill group. • Basic details of the active pricing groups which are defined for each bill group. • Basic information about the approval transactions which are created while defining, editing, and deleting the parent customer's and bill groups' pricing rules.
A bill group who is associated with the self-funded policy	The **Customer 360° Information** screen allows you to view: • Basic details, characteristics, child persons, billing hierarchy, and customer contacts of the bill group. • Basic details, characteristics, automatic payment options, financial and collections summary, and unpaid bills of the bill group's account. • List of self-funded policies to which the bill group is associated. • Basic details and policy persons of a self-funded policy. • Summarized tree view listing the parent customer and pricing rules which are defined for the parent customer.

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If you are viewing the 360° information of...	Then
	• Basic details of the self-funded policies which are associated with the bill group. • Basic details of the pricing rules which are defined for the self-funded policies of the bill group. • Basic details of the active pricing groups which are defined for the bill group. • Basic information about the approval transactions which are created while defining, editing, and deleting the pricing rules of the bill group.
A parent customer who is associated with the fully-insured group policy	The **Customer 360° Information** screen allows you to view: • Basic details, characteristics, child persons, billing hierarchy, and customer contacts of the parent customer. • Sort IDs of all effective child persons whose person type is set to **Bill Group** and who are related to the parent customer using a relationship type which is specified in the **Person Relationship Type** option type of the **C1-ASOBLLNG** feature configuration. • Derivation and pricing parameters defined for the bill group and sort ID combinations. • Customer registration objects through which the bill groups are created for the parent customer. • List of the parent customer's and bill groups' accounts. Note that the system lists the accounts of all effective child persons whose person type is set to **Bill Group** and who are related to the parent customer using a relationship type which is specified in the **Person Relationship Type** option type of the **C1-ASOBLLNG** feature configuration. • Basic details, characteristics, automatic payment options, financial and collections summary, and unpaid bills of the parent customer's or bill group's account. • List of fully-insured group policies to which the parent customer or its bill groups are associated. • Basic details, policy persons, and policy plans of a fully-insured group policy to which the parent customer or its bill group is associated. • Basic details of the pricing rules which are defined for different entities (such as parent customer, fully-insured group policy, policy plan, and state of issue). • Summarized tree view listing the pricing rules which are defined for the parent customer, fully-insured group policies, and policy plans. • Basic information about the approval transactions which are created while defining, editing, and deleting the pricing rules for different entities.
A bill group who is associated with the fully-insured group policy	The **Customer 360° Information** screen allows you to view: • Basic details, characteristics, child persons, billing hierarchy, and customer contacts of the bill group. • Basic details, characteristics, automatic payment options, financial and collections summary, and unpaid bills of the bill group's account. • List of fully-insured group policies to which the bill group is associated. • Basic details, policy persons, and policy plans of the fully-insured group policy.

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If you are viewing the 360° information of...	Then
	• Basic details of the pricing rules which are defined for different entities (such as parent customer, fully-insured group policy, policy plan, and state of issue). • Basic information about the approval transactions which are created while defining, editing, and deleting the pricing rules for different entities.
A person whose person type is neither **Parent Customer** nor **Bill Group**	The **Customer 360° Information** screen allows you to view: • Basic details, characteristics, child persons, billing hierarchy, and customer contacts of the person. • Basic details, characteristics, automatic payment options, administrative contracts, financial and collections summary, billing and adjustment summary, and unpaid bills of the person's account. • List of policies to which the person is associated. • Basic details, policy persons, and policy plans of a policy.

This screen consists of the following tabs:

- Customer 360° Information - Person on page 609
- Customer 360° Information - Account on page 620
- Customer 360° Information - Policy on page 634
- Customer 360° Information - Pricing Information on page 641

Note: If a person does not have an account or policy, the data does not appear in the **Account** or **Policy** tab, respectively. And, if the pricing rules are not defined for the parent customer, fully-insured group or self-funded policy, fully-insured group policy plan, or state of issue, the data does not appear in the **Pricing Information** tab.

Customer 360° Information - Person

The following table provides information about the **Person** tab:

If you are viewing the 360° information of...	Then...
A parent customer who is associated with the self-funded or fully-insured group policy	The **Person** tab displays the following: • Basic details, characteristics, child persons, billing hierarchy, and customer contacts of the parent customer. • Sort IDs of all effective child persons whose person type is set to **Bill Group** and who are related to the parent customer using a relationship type which is specified in the **Person Relationship Type** option type of the **C1-ASOBLLNG** feature configuration. • Derivation and pricing parameters defined for the bill group and sort ID combinations. • Customer registration objects through which the bill groups are created for the parent customer.
A bill group who is associated with the fully-insured group or self-funded policy	The **Person** tab displays the basic details, characteristics, child persons, billing hierarchy, and customer contacts of the bill group.
A person whose person type is neither **Parent Customer** nor **Bill Group**	The **Person** tab displays the basic details, characteristics, child persons, billing hierarchy, and customer contacts of the person.

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It contains the following zones:

- Person Information on page 610
- Additional Attributes on page 612
- Child Persons on page 613
- Person Hierarchy on page 613

> **Note:** The **Person Hierarchy** zone does not appear when you are viewing the 360° information of a person whose person type is set to **Parent Customer**.

- Person Billing Hierarchy on page 614

> **Note:** The **Person Billing Hierarchy** zone appears when you are viewing the 360° information of a person whose person type is set to **Parent Customer**.

- Bill Group Derivation and Pricing Parameters on page 616

> **Note:** The **Bill Group Derivation and Pricing Parameters** zone appears when you are viewing the 360° information of a person whose person type is set to **Parent Customer**.

- Bill Group Sorting on page 618

> **Note:** The **Bill Group Sorting** zone appears when you are viewing the 360° information of a person whose person type is set to **Parent Customer**.

- Customer Contacts on page 619
- Bill Groups Created Via Customer Registration on page 620

> **Note:** The **Bill Groups Created Via Customer Registration** zone appears when you are viewing the 360° information of a person whose person type is set to **Parent Customer**.

Related Topics

For more information on...	See...
How to view the 360° information of a person	Viewing the 360° Information of a Person on page 600
How to setup the **C1-ASOBLLNG** feature configuration	Setting the C1-ASOBLLNG Feature Configuration on page 4417

Person Information

The **Person Information** zone displays the details of the person. It contains the following sections:

- **Main** - Displays the basic information about the person. It contains the following fields:

Field Name	Field Description
Person Information	Displays information about the person. In addition, a context menu appears corresponding to this field which helps in navigating to other screens in the application. **Note:** It has a link. On clicking the link, the **Person** screen appears where you can view the details of the person.
Person Type	Indicates the type of the person. The valid values are: • Business • Bill Group • Group • Broker

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Field Name	Field Description
	• Person • Parent Customer
Date of Birth	Displays the date when the person was born. **Note:** This field appears when the respective data is available for the person.

- **Person Names** - Lists the primary and non-primary names of the person. It contains the following columns:

Column Name	Column Description
Name Type	Indicates the type of the name.
Person Name	Displays the name of the person.

- **Person Identifiers** - Lists various types of identification associated with the person. It contains the following columns:

Column Name	Column Description
Person Identifier Type	Indicates the person identifier type.
Person Identifier	Displays the value of the person identifier type.

- **Contact Information** - Displays the contact details of the person. It contains the following fields:

Field Name	Field Description
Country	Indicates the country where the person is located.
Address 1	Displays the first line of the person's address. It may contain details, such as house number and apartment name.
Address 2	Displays the second line of the person's address. It may contain details, such as street name.
Address 3	Displays the third line of the person's address. It may contain the landmark details.
Address 4	Displays the fourth line of the person's address.
House Type	Indicates the type of the house.
Number 1	Displays the numeric information, if any, related to the address.
Number 2	Displays the numeric information, if any, related to the address.
In City Limit	Indicates whether the person resides within the city limit or not. The valid values are: • Yes • No
City	Displays the city where the person is located.
Geographic Code	Displays the geographic code of the address.
County	Displays the county where the person is located.
State	Indicates the state where the city or county is located.
Postal	Displays the postal or zip code of the address.
Email ID	Displays the e-mail ID of the person.

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Note: The above mentioned fields appear in the **Contact Information** section when the respective data is available for the person.

- **Phone Details** - Lists the phone details of the person. It contains the following columns:

Column Name	Column Description
Phone Type	Indicates the type of the phone number.
Phone Number	Displays the phone number of the person.
Extension	Displays the telephone extension number (if any).

- **Person Collection** - Lists the person's collection and advance deposit details. It contains the following fields:

Field Name	Field Description
Collection Class	Displays the separate delinquency process created for the accounts belonging to the collection class.
Last Credit Review Date	Indicates the date when the account's debt was last reviewed.
Drag Days	Displays the additional grace days offered at the account level.
Advance Deposit Amount	Displays the advance deposit amount. **Note:** This field appears only when the advance deposit level of a person is set to **Parent Customer**.
Advance Deposit Grace Days	Displays the grace days used for calculating the advance deposit grace period. **Note:** This field appears only when the advance deposit level of a person is set to **Parent Customer**.
Advance Deposit Level	Indicates whether the advance deposit received from the group customer is parked at the parent customer or policy level. The valid values are: • Parent Customer • Policy **Note:** This field appears only when you are viewing the details of a person whose person type is set to **Parent Customer**.

Note: The fields appear in the **Person Collection** section only when the respective data is available for the person.

Additional Attributes

The **Additional Attributes** zone lists the characteristics of the person. It contains the following columns:

Column Name	Column Description
Effective Date	Displays the date from when the characteristic is effective for the person.
Characteristic Type	Indicates the characteristic type.
Characteristic Value	Displays the value of the characteristic type.
Description	Displays the description of the characteristic value.

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Column Name	Column Description
	Note: The data appears in this column when the type of characteristic value is set to **Predefined Value** or **Foreign Key Value**.

You can filter the list using the **Characteristic Type** field available in the **Filter** area. By default, the **Filter** area is hidden. You can view the **Filter** area by clicking the **Filters** (▽) icon in the upper right corner of this zone.

Child Persons

The **Child Persons** zone lists the child persons included in the person's hierarchy. It contains the following columns:

Column Name	Column Description
Child Person Information	Displays information about the child person.
	Note: It has a link. On clicking the link, the **Person** screen appears where you can view the details of the child person.
Relationship Type	Indicates how the child person is related to the parent person.
Start Date	Displays the date from when the child person is related to the parent person.
End Date	Displays the date till when the child person is related to the parent person.

Note: Pagination is used to display limited number of records in this zone. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

You can view the 360° information of a child person by clicking the **View** (🔗) icon corresponding to the child person in this zone.

You can create a new child person through the **Customer Registration** feature by clicking the **Add** link in the upper right corner of this zone. While adding a child person to a parent person, the child person is related to the parent person using the relationship type which is specified in the **Person Relationship Type** option type of the **C1-ASOBLLNG** feature configuration.

You can filter the list using the **Person Relationship Type** field available in the **Filter** area. By default, the **Filter** area is hidden. You can view the **Filter** area by clicking the **Filters** (▽) icon in the upper right corner of this zone.

Related Topics

For more information on...	See...
How to setup the **C1-ASOBLLNG** feature configuration	Setting the C1-ASOBLLNG Feature Configuration on page 4417

Person Hierarchy

The **Person Hierarchy** zone lists the following in a tree structure:

- Information string of accounts where the person is the main customer
- Information string of policies where the person is associated
- Information string of membership where the person is the main subscriber
- Information string of the parent persons

It does not appear when you are viewing the 360° information of a person whose person type is set to **Parent Customer**. It contains the following column:

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<table>
<tr><th>Column Name</th><th>Column Description</th></tr>
<tr><td>Hierarchy</td><td>Displays information about the person, account, policy, membership, and parent person in a tree structure. Each node in the tree structure has a link. The following table indicates the information string that appears in various scenarios:
<table>
<tr><th>If...</th><th>Then...</th></tr>
<tr><td>The person is the main customer of an account</td><td>The account information string appears. It has a link. On clicking the link, the 360° information of the account appears in the Account tab of the Customer 360° Information screen.</td></tr>
<tr><td>The person is associated with a policy</td><td>The policy information string appears. It has a link. On clicking the link, the 360° information of the policy appears in the Policy tab of the Customer 360° Information screen.</td></tr>
<tr><td>The person is the main subscriber in a membership</td><td>The membership information string appears. It has a link. On clicking the link, the Membership Information screen appears where you can view the details of the respective membership.</td></tr>
<tr><td>The person is associated with a policy and is the main subscriber in a membership of its policy plan</td><td>The policy information string appears. It has a link. On clicking the link, the 360° information of the policy appears in the Policy tab of the Customer 360° Information screen.</td></tr>
<tr><td>The person has a parent person</td><td>The person information string appears. It has a link. On clicking the link, the 360° information of the person appears in the Person tab of the Customer 360° Information screen.</td></tr>
</table></td></tr>
</table>

Person Billing Hierarchy

The following table lists the information which appears in the **Person Billing Hierarchy** zone:

<table>
<tr><th>If you are viewing the 360° information of a...</th><th>Then...</th></tr>
<tr><td>Parent Customer</td><td>The following information appears in a tree structure:
Information string of each policy to which the parent customer is associated.
Information string of each account where the parent customer is the main customer.
Information string of each effective child person whose person type is set to Bill Group) and who is related to the parent customer using a relationship type which is specified in the Person Relationship Type option type of the C1-ASOBLLNG feature configuration
Information string of each policy to which the bill group is associated.
Information string of each account where the bill group is the main customer.</td></tr>
<tr><td>Bill Group</td><td>The following information appears in a tree structure:</td></tr>
</table>

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If you are viewing the 360° information of a...	Then...
	• Information string of each account where the bill group is the main customer. • Information string of each policy to which the bill group is associated. • Information string of the parent person

It appears when you are viewing the 360° information of a person whose person type is set to **Parent Customer**. It contains the following column:

Column Name	Column Description
Hierarchy	If you are viewing the 360° information of a parent customer, the following table indicates the information string that appears in various scenarios: **If...** / **Then...** The parent customer is associated with a policy — The policy information string appears. It has a link. On clicking the link, the 360° information of the policy appears in the **Policy** tab of the **Customer 360° Information** screen. The parent customer is the main customer of an account — The account information string appears. It has a link. On clicking the link, the 360° information of the account appears in the **Account** tab of the **Customer 360° Information** screen. The parent customer has a bill group — The person information string appears. It has a link. On clicking the link, the 360° information of the bill group appears in the **Person** tab of the **Customer 360° Information** screen. A bill group is the main customer of an account — The account information string appears. It has a link. On clicking the link, the 360° information of the account appears in the **Account** tab of the **Customer 360° Information** screen. A bill group is associated with a policy — The policy information string appears. It has a link. On clicking the link, the 360° information of the policy appears in the **Policy** tab of the **Customer 360° Information** screen. However, if you are viewing the 360° information of a bill group, the following table indicates the information string that appears in various scenarios: **If...** / **Then...** The bill group is the main customer of an account — The account information string appears. It has a link. On clicking the link, the 360° information of the account appears in the **Account** tab of the **Customer 360° Information** screen. The bill group is associated with a policy — The policy information string appears. It has a link. On clicking the link, the 360° information of the policy appears in the **Policy** tab of the **Customer 360° Information** screen. The bill group has a parent person — The person information string appears. It has a link. On clicking the link, the 360° information of the

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Column Name	Column Description	
	If...	**Then...**
		parent customer appears in the **Person** tab of the **Customer 360° Information** screen.

Related Topics

For more information on...	See...
How to setup the **C1-ASOBLLNG** feature configuration	Setting the C1-ASOBLLNG Feature Configuration on page 4417

Bill Group Derivation and Pricing Parameters

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

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

Note: In the above examples, the bill group is derived based on the specified attributes when the source system, parameter 1, and parameter 2 are mapped to the appropriate transaction fields in the pricing rule type using which the pricing rules are defined for the bill group.

You can also define criteria for a rule in a pricing group using the parameters, such as source system, parameter 1, parameter 2, parameter 3, and parameter 4. If a pricing rule is defined for a bill group using a pricing group, you can define more than one price in the pricing rule which is offered based on the attributes of the employees.

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

The **Bill Group Derivation and Pricing Parameters** zone lists the derivation and pricing parameters defined for all effective child persons whose person type is set to **Bill Group** and who are related to the parent customer using a relationship type which is specified in the **Person Relationship Type** option type of the **C1-ASOBLLNG** feature configuration. It appears when you are viewing the 360° information of a person whose person type is set to **Parent Customer**.

You can define and edit the derivation and pricing parameters for a bill group (who is effective child person of the parent customer) and sort ID combination through this zone. You can also upload the derivation and pricing parameters for one or more bill group and sort ID combinations at the same time using the **Upload Request** feature. You can upload the derivation and pricing parameters for a bill group and sort ID combination either from this zone or from the **Upload Request** screen. While creating an upload request for the derivation and pricing parameters, you need to specify the parent customer whose bill groups' derivation and pricing parameters you want to upload. Once the upload request is processed, the derivation and pricing parameters are defined for the bill group and sort ID combination in the system.

This zone contains the following columns:

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Column Name	Column Description
Bill Group Information	Indicates the parent customer's bill group for whom the derivation and pricing parameters are defined. In addition, a context menu appears corresponding to this column which helps in navigating to other screens in the application. **Note:** It has a link. On clicking the link, the **Person** screen appears where you can view the details of the respective bill group (i.e. person).
Bill Group ID	Displays the bill group ID (i.e. person ID).
Source System	Indicates the source system from where the claim and enrollment transactions are received.
Parameter 1	Indicates the employee attribute based on which you want to derive the bill group.
Parameter 2	Indicates the employee attribute based on which you want to derive the bill group.
Parameter 3	Indicates the employee attribute based on which you want to derive the bill group.
Parameter 4	Indicates the employee attribute based on which you want to derive the bill group.
Sort ID	Indicates the sort ID of the bill group.
Effective Date	Displays the date from when the derivation and pricing parameters are effective for the bill group and sort ID combination.
Status	Indicates the status of the derivation and pricing parameters defined for the bill group and sort ID combination. The valid values are: • Active • Inactive

In addition, it contains the following buttons:

Button Name	Button Description
Edit	Used to edit the derivation and pricing parameters of a bill group and sort ID combination.

If you want to edit the derivation and pricing parameters of all bill group and sort ID combinations, you need to select the check box corresponding to the column header in this zone, and then click the **Edit** button. However, if you want to edit the derivation and pricing parameters of one or more bill group and sort ID combination, you need to select the check box corresponding to the bill group and sort ID combination, and then click the **Edit** button.

Note:

Pagination is used to display limited number of records in this zone. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

If you select the check box corresponding to the column header in this zone, the system considers only those records which are present on the respective page for editing.

You can define the derivation and pricing parameters for a bill group (who is effective child person of the parent customer) and sort ID combination by clicking the **Add** link in the upper right corner of this zone. You can also upload the derivation and pricing parameters for one or more bill group (who is effective child person of the parent customer) and sort ID combinations by clicking the **Upload** link in the upper right corner of this zone.

You can filter the list using various search criteria (such as, **Parameter 1**, **Parameter 2**, **Parameter 3**, **Parameter 4**, **Bill Group ID**, **Sort ID**, **Status**, and **Bill Group Name**) available in the **Filter** area. By default, the **Filter** area is hidden. You can view the **Filter** area by clicking the **Filters** (▽) icon in the upper right corner of this zone.

You can change the layout of this zone. For more information on how to change the layout, see Changing the Layout on page 4410.

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Related Topics

For more information on...	See...
How to define the derivation and pricing parameters for a bill group and sort ID combination	Defining the Derivation and Pricing Parameters for a Bill Group and Sort ID Combination on page 663
How to edit the derivation and pricing parameters of a bill group and sort ID combination	Editing the Derivation and Pricing Parameters of a Bill Group and Sort ID Combination on page 665
How to create an upload request for the derivation and pricing parameters from the **Bill Group Derivation and Pricing Parameters** zone	Creating a Bill Group Derivation and Pricing Parameters Upload Request on page 667
How to create an upload request for the derivation and pricing parameters from the **Upload Request** screen	Creating an Upload Request on page 2168
How to setup the **C1-ASOBLLNG** feature configuration	Setting the C1-ASOBLLNG Feature Configuration on page 4417

Bill Group Sorting

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

The **Bill Group Sorting** zone lists the sort IDs defined for all effective child persons whose person type is set to **Bill Group** and who are related to the parent customer using a relationship type which is specified in the **Person Relationship Type** option type of the **C1-ASOBLLNG** feature configuration. It appears when you are viewing the 360° information of a person whose person type is set to **Parent Customer**.

You can define, edit, and delete a sort ID of a bill group (who is effective child person of the parent customer) through this zone. You can also upload a set of sort IDs for one or more bill groups (who are effective child persons of the parent customer) at the same time using the **Upload Request** feature. You can upload the sort IDs for bill groups either from this zone or from the **Upload Request** screen. While creating an upload request for bill group sort IDs, you need to specify the parent customer whose bill groups' sort IDs you want to upload. Once the upload request is processed, the sort ID is defined for the respective bill group in the system.

This zone contains the following columns:

Column Name	Column Description
Bill Group Information	Indicates the parent customer's bill group for whom the sort ID is defined. In addition, a context menu appears corresponding to this column which helps in navigating to other screens in the application. **Note:** It has a link. On clicking the link, the **Person** screen appears where you can view the details of the respective bill group (i.e. person).
Bill Group ID	Displays the bill group ID (i.e. person ID).
Sort ID	Displays the sort ID.
Description	Displays the description of the sort ID.
Start Date	Displays the date from when the sort ID is effective for the bill group.
End Date	Displays the date till when the sort ID is effective for the bill group.

In addition, it contains the following buttons:

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Button Name	Button Description
Edit	Used to edit the details of a bill group's sort ID.
Delete	Used to delete a bill group's sort ID.
	Note: You can delete a bill group's sort ID when the derivation and pricing parameters are not yet defined for the bill group and sort ID combination.

If you want to edit or delete all sort IDs of effective bill groups, you need to select the check box corresponding to the column header in this zone, and then accordingly click the **Edit** or **Delete** button. However, if you want to edit or delete one or more sort IDs of effective bill groups, you need to select the check box corresponding to the bill group and sort ID combination, and then accordingly click the **Edit** or **Delete** button.

Note:

Pagination is used to display limited number of records in this zone. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

If you select the check box corresponding to the column header in this zone, the system considers only those records which are present on the respective page for editing or deleting.

You can define a sort ID for a bill group (who is effective child person of the parent customer) by clicking the **Add** link in the upper right corner of this zone. You can also upload a set of sort IDs for one or more bill groups (who are effective child persons of the parent customer) by clicking the **Upload** link in the upper right corner of this zone.

You can filter the list using the **Bill Group Name** field available in the **Filter** area. By default, the **Filter** area is hidden. You can view the **Filter** area by clicking the **Filters** (▽) icon in the upper right corner of this zone.

You can change the layout of this zone. For more information on how to change the layout, see Changing the Layout on page 4410.

Related Topics

For more information on...	See...
How to define a sort ID for a bill group	Defining a Sort ID for a Bill Group on page 658
How to edit a sort ID of a bill group	Editing a Sort ID of a Bill Group on page 659
How to delete a sort ID of a bill group	Deleting a Sort ID of a Bill Group on page 660
How to create an upload request for bill group sort ID from the **Bill Group Sorting** zone	Creating a Bill Group Sorting Upload Request on page 661
How to create an upload request for bill group sort ID from the **Upload Request** screen	Creating an Upload Request on page 2168
How to setup the **C1-ASOBLLNG** feature configuration	Setting the C1-ASOBLLNG Feature Configuration on page 4417

Customer Contacts

The **Customer Contacts** zone displays information about how and when the person was contacted. It contains the following columns:

Column Name	Column Description
Contact Date	Displays the date when the person was contacted.
Customer Contact Information	Displays information about the customer contact.

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Column Name	Column Description
	Note: It has a link. On clicking the link, the **Customer Contact** screen appears where you can view the details of the customer contact.
Contact Type	Indicates how the person was contacted.
Comments	Displays additional information about the customer contact.

You can filter the list using various search criteria (such as, **On or Before Contact Date**, **Contact Class**, **Contact Type**, and **Show Open Contacts Only**) available in the **Filter** area. By default, the **Filter** area is hidden. You can view the **Filter** area by clicking the **Filters** (▽) icon in the upper right corner of this zone.

Bill Groups Created Via Customer Registration

The **Bill Groups Created Via Customer Registration** zone lists the customer registration objects through which the parent customer's bill groups are created in the system. It appears when you are viewing the 360° information of a person whose person type is set to **Parent Customer**. It contains the following columns:

Column Name	Column Description
Customer Registration Information	Indicates the customer registration object through which the bill group is created.
	Note: It has a link. On clicking the link, the **Customer Registration** screen appears where you can view the details of the respective customer registration object.
Person Name	Displays the name of the bill group.
Person Relationship Type	Indicates how the bill group is related to the parent customer.
Status	Indicates the status of the customer registration object. The valid value is: • Bill Group Approved

Note: Pagination is used to display limited number of records in this zone. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

You can filter the list using the **Person Relationship Type** field available in the **Filter** area. By default, the **Filter** area is hidden. You can view the **Filter** area by clicking the **Filters** (▽) icon in the upper right corner of this zone.

Customer 360° Information - Account

The following table provides information about the **Account** tab:

If you are viewing the 360° information of...	Then...
A parent customer who is associated with the self-funded or fully-insured group policy	The **Account** tab displays the following: • List of the parent customer's and bill groups' accounts. Note that the system lists the accounts of all effective child persons whose person type is set to **Bill Group** and who are related to the parent customer using a relationship type which is specified in the **Person Relationship Type** option type of the **C1-ASOBLLNG** feature configuration.

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If you are viewing the 360° information of...	Then...
	• Basic details, characteristics, automatic payment options, financial and collections summary, and unpaid bills of the parent customer's or bill group's account.
A bill group who is associated with the fully-insured group or self-funded policy	The **Account** tab displays the basic details, characteristics, automatic payment options, financial and collections summary, and unpaid bills of the bill group's account. **Note:** If the bill group has multiple accounts, the system, by default, picks and displays the details of any one of its account.
A person whose person type is neither **Parent Customer** nor **Bill Group**	The **Account** tab displays the basic details, characteristics, automatic payment options, administrative contracts, financial and collections summary, billing and adjustment summary, and unpaid bills of the person's account. **Note:** If the person has multiple accounts, the system, by default, picks and displays the details of any one of its account.

It contains the following zones:

- Account List on page 622

  Note: The **Account List** zone appears when you are viewing the 360° information of a person whose person type is set to **Parent Customer**.

- Account Information on page 623
- Auto Pay Details on page 625
- Account Characteristics on page 624
- Administrative Contracts on page 625

  Note: The **Administrative Contracts** zone appears when you are viewing the 360° information of a person whose person type is neither **Parent Customer** nor **Bill Group**.

- Account Financial and Collections Summary on page 626
- Billing and Adjustment Summary on page 627

  Note: The **Billing and Adjustment Summary** zone appears when you are viewing the 360° information of a person whose person type is neither **Parent Customer** nor **Bill Group**.

- Open Bills on page 627
- Billed Vs Paid on page 629
- Timeline on page 631
- Trial Bills on page 634

Related Topics

For more information on...	See...
How to view the 360° information of an account	Viewing the 360° Information of an Account on page 601
How to setup the **C1-ASOBLLNG** feature configuration	Setting the C1-ASOBLLNG Feature Configuration on page 4417

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Account List

The **Account List** zone lists the accounts of the parent customer and its bill groups. Note that the system lists the accounts of all effective child persons whose person type is set to **Bill Group** and who are related to the parent customer using a relationship type which is specified in the **Person Relationship Type** option type of the **C1-ASOBLLNG** feature configuration. It appears when you are viewing the 360° information of a person whose person type is set to **Parent Customer**. It contains the following columns:

Column Name	Column Description
Person Name	Indicates the person who is linked to the account.
Account Information	Displays information about the account. In addition, a context menu appears corresponding to this column which helps in navigating to other screens in the application.
	Note: It has a link. On clicking the link, the **Account** screen appears where you can view the details of the respective account.
Person Type	Indicates the type of the person. The valid values are: • Business • Bill Group • Group • Broker • Person • Parent Customer
Person's Mailing Address	Displays the mailing address of the person.
Person ID	Displays the person ID.

Note: Pagination is used to display limited number of records in this zone. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

On clicking the **Broadcast** (📡) icon corresponding to an account, the following zones appear in the **Account** tab:

- Account Information
- Auto Pay Details
- Account Financial and Collections Summary
- Account Characteristics
- Open Bills
- Billed Vs Paid
- Timeline

You can filter the list using various search criteria (such as, **Person Name**, **Account ID**, **Person Type**, and **Include Ended Child Person's Accounts**) available in the **Filter** area. By default, the **Filter** area is hidden. You can view the **Filter** area by clicking the **Filters** (▽) icon in the upper right corner of this zone.

Related Topics

For more information on...	See...
How to setup the **C1-ASOBLLNG** feature configuration	Setting the C1-ASOBLLNG Feature Configuration on page 4417

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Account Information

The **Account Information** zone displays the details of the account. It contains the following sections:

- **Main** - Displays the basic information about the account. It contains the following fields:

Field Name	Field Description
Account Information	Displays information about the account. In addition, a context menu appears corresponding to this field which helps in navigating to other screens in the application.
	Note: It has a link. On clicking the link, the **Account** screen appears where you can view the details of the respective account.
Management Group	Indicates the account management group to which the account belongs.
	Note: It has a link. On clicking the link, the **Account Management Group** screen appears where you can view the details of the respective account management group. This field appears when the respective data is available for the account.

- **Contact Information** - Displays the contact details of the account's main customer. It contains the following fields:

Field Name	Field Description
Address Source	Indicates which address should be used to route the account's bills and/or quotes via the postal service.
Country	Indicates the country where the main customer is located.
Address 1	Displays the first line of the main customer's address. It may contain details, such as house number and apartment name.
Address 2	Displays the second line of the main customer's address. It may contain details, such as street name.
Address 3	Displays the third line of the main customer's address. It may contain the landmark details.
Address 4	Displays the fourth line of the main customer's address.
House Type	Indicates the type of the house.
Number 1	Displays the numeric information, if any, related to the address.
Number 2	Displays the numeric information, if any, related to the address.
In City Limit	Indicates whether the main customer resides within the city limit or not. The valid values are: • Yes • No
City	Displays the city where the main customer is located.
Geographic Code	Displays the geographic code of the address.
County	Displays the county where the main customer is located.
State	Indicates the state where the city or county is located.
Postal	Displays the postal or zip code of the address.

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Note: The above mentioned fields except **Address Source** appear in the **Contact Information** section when the address source of the main customer is set to **Account Override** and the respective data is available for the account.

- **Account Identifiers** - Lists various types of identification associated with the account. It contains the following columns:

Column Name	Column Description
Account Identifier Type	Indicates the account identifier type.
Account Identifier	Displays the value of the account identifier type.

- **Billing** - Displays the billing information of the account. It contains the following fields:

Field Name	Field Description
Bill Cycle	Indicates the bill cycle of the account.
	Note: It has a link. On clicking the link, the **Bill Cycle** screen appears where you can view the details of the respective bill cycle. This field appears when the respective data is available for the account.
Bill After Date	Displays the date when the billing should be resumed for the account.
	Note: This field appears when the respective data is available for the account.
Skip Months	Indicates the months separated by comma for which billing should be skipped for the account.
	Note: The system derives the skip months for an account using the billing preference. You can set the billing preference for an account through a characteristic type which is specified in the **Bill Cycle Rule Code** option type of the **C1-ASOBLLNG** feature configuration. The system enables you to define, edit, delete, and copy a billing preference through the **Field Mapping** screen. For more information, see Defining a Billing Preference on page 3617.

Account Characteristics

The **Account Characteristics** zone lists the characteristics of the account. It contains the following columns:

Column Name	Column Description
Effective Date	Displays the date from when the characteristic is effective for the account.
Characteristic Type	Indicates the characteristic type.
Characteristic Value	Displays the value of the characteristic type.
Description	Displays the description of the characteristic value.
	Note: The data appears in this column when the type of characteristic value is set to **Predefined Value** or **Foreign Key Value**.

You can filter the list using the **Characteristic Type** field available in the **Filter** area. By default, the **Filter** area is hidden. You can view the **Filter** area by clicking the **Filters** (▽) icon in the upper right corner of this zone.

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Administrative Contracts

The **Administrative Contracts** zone lists the account's contracts which should be monitored closely for various administrative reasons. It appears when you are viewing the 360° information of a person whose person type is neither **Parent Customer** nor **Bill Group**. It contains the following columns:

Column Name	Column Description
Contract ID	Displays the contract ID. **Note:** It has a link. On clicking the link, the **Contract** screen appears where you can view the details of the respective contract.
Contract Type	Indicates the type of the contract.
Currency	Indicates the currency in which the contract balance is maintained.
Current Balance	Displays the current balance on the contract.

Note:

Pagination is used to display limited number of records in this zone. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

The data appears in this zone when you have defined the value for the **Administrative Contract Type** option type in the **C1_CMO** feature configuration.

Related Topics

For more information on...	See...
How to setup the **C1_CMO** feature configuration	Setting the C1_CMO Feature Configuration on page 4439

Auto Pay Details

The **Auto Pay Details** zone lists the automatic payment options defined for the account. It contains the following columns:

Column Name	Column Description
Start Date	Displays the date from when the automatic payment option is effective.
End Date	Displays the date till when the automatic payment option is effective.
Auto Pay Source Code	Indicates the source of funds used to make the automatic payment. For example, debit or credit card.
Last Four Digits of Card	Displays the last four digits of the debit or credit card. **Note:** The data appears in this column when the external type of the auto pay source code's tender type is set to **Credit Card Withdrawal**.
Percentage	Indicates the percentage of automatic payment that must be made through the automatic payment option.
Priority	Indicates the order in which the automatic payment option should be considered for the effective date range.

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Note: Pagination is used to display limited number of records in this zone. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

Account Financial and Collections Summary

The **Account Financial and Collections Summary** zone displays the financial and collection details of the account. It contains the following fields:

Field Name	Field Description
Collection Class	Indicates the collection class to which the account belongs.
Current Credit Rating	Indicates the account's credit rating which is effective on the current date.
Last Credit Review Date	Displays the date when the account's debt was last reviewed.
Last Payment Date	Displays the date when the last payment was made for the account. **Note:** The system considers the last payment which is in the **Frozen** status.
Last Payment Amount	Displays the amount of the last payment. **Note:** The system considers the last payment which is in the **Frozen** status.
Current Balance	Displays the current balance of the account. **Note:** Current Balance = Account Level billed + Payments + Excess Credits + Unbilled Adjustments + Unbilled Corrections
Payoff Balance	Displays the payoff balance of the account. **Note:** Payoff balance = Account Level billed + Payments + Excess Credits + Unbilled Corrections
Actual Account Balance	Displays the actual balance of the account. **Note:** Actual Account Balance = Account Level billed + Payments + Excess Credits
Account on Hold	Indicates whether the account is on hold or not. The valid values are: • Yes • No
Account on Promise to Pay	Indicates whether any promise to pay is scheduled for the account on the current or future date. The valid values are: • Yes • No
Account on Payment Arrangement	Indicates whether any payment arrangement exists for the account. The valid values are: • Yes • No
Account on Payment Agreement	Indicates whether any active payment agreement request exists for the account. The valid values are:

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Field Name	Field Description
	• Yes • No

Billing and Adjustment Summary

The **Billing and Adjustment Summary** zone displays the billing and adjustment summary of the account. It appears when you are viewing the 360° information of a person whose person type is neither **Parent Customer** nor **Bill Group**. It contains the following sections:

- **Quote Billed Balance** - Displays information about the account's billed balance. It contains the following fields:

Field Name	Field Description
Past Due Billed Balance	Displays the sum of open financial transactions of the account that are listed on a bill with a past due date.
Future Due Billed Balance	Displays the sum of open financial transactions of the account that are listed on a bill with a future due date.
Quote Billed Balance	Displays the sum of past due billed balance and future due billed balance.

- **Future Adjustments and Retroactivity** - Displays information about the account's future adjustments and retro activities. It contains the following fields:

Field Name	Field Description
Future Adjustments	Displays the sum of adjustment financial transactions of the account which are swept onto the next bill.
Future Retro Terms (Credits)	Displays the sum of canceled bill segment financial transactions of the account which are presented on the next bill.
Future Retro Adds (Debits)	Displays the sum of membership premium billable charges which are not yet billed to the account. **Note:** The data appears in this field when the values are defined for the **Premium Amount SQI** and **Coverage End Date SQI** option types in the **C1-BILLADJSQ** feature configuration.
Future Balance with Adjustments & Debits/Credits	Displays the sum of quote billed balance, future adjustments, future retro terms (credits), and future retro adds (debits).

Related Topics

For more information on...	See...
How to setup the **C1-BILLADJSQ** feature configuration	Setting the C1-BILLADJSQ Feature Configuration on page 4438

Open Bills

The **Open Bills** zone lists the unpaid bills of the account. By default, the bills where the unpaid amount is greater than zero are listed in this zone. It contains the following columns:

Column Name	Column Description
Bill Date	Displays the date when the bill was generated.

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<table>
<tr><th>Column Name</th><th>Column Description</th></tr>
<tr><td></td><td>Note:
The data in this column is presented in a different color depending on the age bucket in which the bill's days past due falls. The following table lists the color used for presentation in various age buckets:
<table><tr><th>Age Bucket</th><th>Color</th></tr><tr><td>Age 0 to 30 DPD</td><td>Black</td></tr><tr><td>Age 31 to 60 DPD</td><td>Green</td></tr><tr><td>Age 61 to 90 DPD</td><td>Orange</td></tr><tr><td>Age > 90 DPD</td><td>Red</td></tr></table></td></tr>
<tr><td>Bill ID</td><td>Displays the bill ID.
Note: It has a link. On clicking the link, the Bill screen appears where you can view the details of the respective bill.</td></tr>
<tr><td>Due Date</td><td>Displays the date when the bill is due for payment.</td></tr>
<tr><td>Bill Amount</td><td>Displays the bill amount.</td></tr>
<tr><td>Bill Status</td><td>Indicates the status of the bill. The valid values are:
• Pending
• Complete</td></tr>
<tr><td>Unpaid Amount</td><td>Displays the unpaid amount of the bill.</td></tr>
<tr><td>Age Bucket</td><td>Indicates the age bucket in which the bill's days past due falls. The valid values are:
• Age 0 to 30 DPD
• Age 31 to 60 DPD
• Age 61 to 90 DPD
• Age > 90 DPD</td></tr>
<tr><td>Days Past Due</td><td>Displays the number of days past after the due date.</td></tr>
<tr><td>Overdue Process Information</td><td>Indicates the overdue process which is initiated for the bill and is currently in the Active status. In addition, this column has a context menu which helps in navigating to other screens in the application.
Note: It has a link. On clicking the link, the Overdue Process screen appears where you can view the details of the respective overdue process.</td></tr>
<tr><td>Delinquency Process Information</td><td>Indicates the information of a delinquency process created for an overdue bill of the account.
Note: It has a link. On clicking the link, the Delinquency Process screen appears where you can view the details of the respective delinquency process.</td></tr>
<tr><td>Payment Agreement Request Information</td><td>Indicates the active payment agreement request in which the bill is included.</td></tr>
</table>

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Column Name	Column Description
	Note: It has a link. On clicking the link, the **Payment Agreement Request** screen appears where you can view the details of the respective payment agreement request.

You can view additional information about the bill by clicking the **View** (🔗) icon corresponding to the bill in the **Open Bills** zone.

You can filter the list using various search criteria (such as, **On or Before Bill Date** and **Show All Bills**) available in the **Filter** area. By default, the **Filter** area is hidden. You can view the **Filter** area by clicking the **Filters** (▽) icon in the upper right corner of this zone.

Note: If you select the **Show All Bills** option, the system lists all bills where the unpaid amount is greater than or equal to zero.

Related Topics

For more information on...	See...
How to view the details of a bill	Viewing the Bill Details on page 673

Billed Vs Paid

The **Billed Vs Paid** zone lists the following transactions of the account:

- Bills which are created for the account

  Note: The system lists the bills which are created for the account either manually from the user interface or automatically through the batches. It also lists the bills which are created for the account through a manual or automatic invoice request.
- Any excess credit which is made for the account
- Payments which are created or canceled for the account
- Adjustments which are created or canceled for the account
- Refund or Write Off adjustments which are created or canceled for the account
- Payment transfer to the reconciliation contract of the account
- Payment transfer from the reconciliation contract to the payor account's contract
- Reconciliations through which the account's bill segments are reconciled
- Automatic payments sent to the auto clearing house for review before freezing them

Note: The excess credit information for the account appears when you have defined the value for the **On Account Contract Type** option type in the **C1_CMO** feature configuration. Accordingly, the excess credit information (if any) on the respective contracts is listed in this zone.

It contains the following columns:

Column Name	Column Description
Due Date	Displays the date when the bill is due for payment. **Note:** The data appears in this column when the transaction type is set to **Bill**.
Bill ID	Displays the bill ID.

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<table>
<tr><th>Column Name</th><th>Column Description</th></tr>
<tr><td></td><td>Note:
It has a link. On clicking the link, the Bill screen appears where you can view the details of the respective bill.
The data appears in this column when the transaction type is set to Bill.</td></tr>
<tr><td>Transaction Date</td><td>The following table indicates the date that appears depending on the type of the transaction:
<table><tr><th>If the transaction type is...</th><th>Then...</th></tr><tr><td>Bill</td><td>Date when the bill is generated for the account</td></tr><tr><td>Payment</td><td>Date when the payment is made for the account</td></tr><tr><td>Adjustment</td><td>Date when the adjustment is created for the account</td></tr><tr><td>Payment Cancellation</td><td>Date when the payment is canceled for the account</td></tr><tr><td>Adjustment Cancellation</td><td>Date when the adjustment is canceled for the account</td></tr><tr><td>Excess Credit (overpayment)</td><td>Date when the excess credit is made for the account</td></tr><tr><td>Reconciliation Contract</td><td>Date when the payment is transferred to the reconciliation contract of the account</td></tr><tr><td>Reconciliation Contract - Returned</td><td>Date when the payment made to the reconciliation contract of the account is canceled</td></tr><tr><td>Payment Transfer</td><td>Date when the pay instruction for the account is reconciled</td></tr><tr><td>Payment Transfer Cancellation</td><td>Date when the reconciliation is canceled</td></tr></table>Note: The data does not appear in this column for automatic payments which are sent to the auto clearing house for review.</td></tr>
<tr><td>Transaction Type</td><td>Indicates the type of the transaction. The valid values are:
• Bill
• Payment
• Adjustment
• Payment Cancellation
• Adjustment Cancellation
• Excess Credit (overpayment)
• Reconciliation Contract
• Reconciliation Contract - Returned
• Payment Transfer
• Payment Transfer Cancellation</td></tr>
<tr><td>Transaction Description</td><td>Displays the description of the transaction.</td></tr>
</table>

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Column Name	Column Description
	Note: The data appears in this column when the transaction type is set to **Adjustment**, **Adjustment Cancellation**, **Reconciliation Contract - Returned**, **Payment Transfer**, and **Payment Transfer Cancellation**. In addition, the data appears in this column when the automatic payments are sent to the auto clearing house for review before freezing them. The transaction description for such payments is set to **Pending Payment**.
Transaction Amount	Displays the transaction amount.
Unpaid Amount	Displays the unpaid amount of the bill.
	Note: The data appears in this column when the transaction type is set to **Bill**.
Payment Date	Displays the date when the payment is created or canceled for the account.
	Note: The data appears in this column when the transaction type is set to **Payment**, **Payment Cancellation**, or **Excess Credit (overpayment)**.
Tender Type	Indicates the type of tender through which the payment was made.
Check Number/External Reference ID	Displays the check number or external reference ID.
Transaction ID	Displays the payment, adjustment, or reconciliation ID.
	Note: It has a link. On clicking the link, the **Payment**, **Adjustment**, or **Reconciliation** screen appears where you can view the details of the respective transaction.

The **View** (🔗) icon appears corresponding to a bill in this zone. On clicking the **View** (🔗) icon corresponding to a bill, the **Bill Information** screen appears where you can view the details of the respective bill.

You can filter the list using the **On or Before Due Date** field available in the **Filter** area. By default, the **Filter** area is hidden. You can view the **Filter** area by clicking the **Filters** (▽) icon in the upper right corner of this zone.

You can change the layout of this zone. For more information on how to change the layout, see Changing the Layout on page 4410.

Related Topics

For more information on...	See...
How to setup the **C1_CMO** feature configuration	Setting the C1_CMO Feature Configuration on page 4439

Timeline

The **Timeline** zone displays the following information in a graphical form:

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

It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Month	Used to indicate the month till when you want to display the above stated information.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	Note: By default, the current month appears in this field.	
Year	Used to indicate the year till when you want to display the above stated information.	Yes
	Note: By default, the current year appears in this field.	

Depending on the month and year specified in the above fields, the data for the respective month and previous 11 months is presented in the grid. For example, if the Month and Year is set to April 2017, then the data for the May 2016, Jun 2016, Jul 2016, Aug 2016, Sep 2016, Oct 2016, Nov 2016, Dec 2016, Jan 2017, Feb 2017, Mar 2017, and Apr 2017 appears in the grid. To view the data for a different period, you must accordingly change the month and year and then click **Search** (⊙) icon.

You can use the **Previous 12 Months** (⏮), **Previous Month** (⏪), **Go To Today** (○), **Next Month** (⏩), and **Next 12 Months** (⏭) icons to change the values specified in the above mentioned fields.

The following table indicates the data and the manner in which the data is presented in the grid:

Row Name	Row Description
Customer Contacts	A small icon appears for each customer contact which is created for the account's main customer in the respective month. For example, if two customer contacts are created for the main customer in the month of Jan 2017 and one customer contact is created in the month of Feb 2017, then two icons appear in the Jan 2017 column and one icon appear in the Feb 2017 column. A text indicating the day of the month when the customer contact was created appears on the icon. The following table indicates the color in which the icon appears depending on the condition which is satisfied: **If the contact action on the customer contact type is...** / **Then the icon appears in...** Set to **Send Letter** / Red Set to **Action Algorithm** / Yellow On clicking the icon, the corresponding customer contact information appears at the bottom of this zone. It has a link. On clicking the link, the **Customer Contact** screen appears where you can view the details of the respective customer contact. **Note:** You can change the color in which the text appears on the icon and the color in which the icon appears when the above stated conditions are met through the **C1-TL-CC-EVT** algorithm.
Bills	A small icon appears for each bill which is created for the account in the respective month. For example, if three bills are created for the account in the month of Jan 2017, two bills are created in the month of Feb 2017, and one bill is created in the month of Apr 2017, then three icons appear in the Jan 2017 column, two icons appear in the Feb 2017 column, and one icon appears in the Apr 2017 column. A text indicating the day of the month when the bill was due appears on the icon. You can either display the day of the due date or bill date on the icon depending on the requirement. The following table indicates the color in which the icon appears depending on the condition which is satisfied: **If the bill is...** / **Then the icon appears in...** Fully Matched / Green Unmatched / Red

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<table>
<tr><th>Row Name</th><th>Row Description</th></tr>
<tr><td></td><td>
<table>
<tr><th>If the bill is...</th><th>Then the icon appears in...</th></tr>
<tr><td>Credit Note</td><td>Blue</td></tr>
<tr><td>Scheduled for billing in the next bill cycle</td><td>Black</td></tr>
</table>
On clicking the icon, the corresponding bill information appears at the bottom of this zone. It has a link. On clicking the link, the Bill screen appears where you can view the details of the respective bill.

Note:
If you want to display the day of the due date on the icon, you must set the Date To Use (D-Due Date, B-Bill Date) parameter in the C1-TL-OI-EVT algorithm to D. However, if you want to display the day of the bill date on the icon, you must set the Date To Use (D-Due Date, B-Bill Date) parameter in the C1-TL-OI-EVT algorithm to B.

You can change the color in which the text appears on the icon and the color in which the icon appears when the above stated conditions are met through the C1-TL-OI-EVT algorithm.
</td></tr>
<tr><td>Payments</td><td>
A small icon appears for each payment which is created for the account in the respective month. For example, if one payment is created for the account in the month of Aug 2016, three payments are created in the month of Dec 2016, and four payments are created in the month of Mar 2017, then one icon appears in the Aug 2016 column, three icons appear in the Dec 2016 column, and four icons appear in the Mar 2017 column. A text indicating the day of the month when the payment was created appears on the icon. The following table indicates the color in which the icon appears depending on the status of the payment:
<table>
<tr><th>Status</th><th>Color</th></tr>
<tr><td>Frozen</td><td>Green</td></tr>
<tr><td>Canceled</td><td>Red</td></tr>
<tr><td>Freezable</td><td>Blue</td></tr>
<tr><td>Error</td><td>Red</td></tr>
<tr><td>Incomplete</td><td>Yellow</td></tr>
</table>
On clicking the icon, the corresponding payment information appears at the bottom of this zone. It has a link. On clicking the link, the Payment screen appears where you can view the details of the respective payment.

Note: You can change the color in which the text appears on the icon and the color in which the icon appears in the different status through the C1-TL-PY-EVT algorithm.
</td></tr>
</table>

Hold Details

The **Hold Details** zone lists the hold requests which are created for the account. Note that only those hold requests are listed in this zone where the respective entity's start date is earlier than or equal to the system date and the entity's end date is later than or equal to the system date. However, note that the system does not list the hold requests which are either in the **Rejected** or **Released** status.

If two or more processes are kept on hold for the account through a hold request, the system will list multiple records for the hold request — one each for the process kept on hold through the hold request. This zone contains the following columns:

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Column Name	Column Description
Hold Request Information	Displays information about the hold request. **Note:** It has a link. On clicking the link, the **Hold Request** screen appears where you can view the details of the respective hold request.
Status	Indicates the status of the hold request. The valid value is: • Draft
Entity	Indicates the type of entity for which the hold request is created. The valid value is: • Account
Hold Reason	Indicates the reason why the hold request is created for the entity.
Hold Process	Indicates the process that is kept on hold for the account.
Start Date	Displays the date from when the hold request is effective.
End Date	Displays the date till when the hold request is effective.

Trial Bills

The **Trial Bills** zone lists the trial bills which are created for the account. It contains the following columns:

Column Name	Column Description
Creation Date	Displays the date when the trial bill is created.
Trial Bill Information	Displays information about the trial bill. **Note:** It has a link. On clicking the link, the **Trial Bill** screen appears where you can view the details of the respective trial bill.
Current Charges	Displays the trial bill amount.

Customer 360° Information - Policy

The following table provides information about the **Policy** tab:

If you are viewing the 360° information of...	Then...
A parent customer who is associated with the self-funded policy	The **Policy** tab displays the following: • List of self-funded policies to which the parent customer's bill groups are associated. **Note:** The system lists only those policies of the bill groups where the parent customer is associated as a policy holder. • Basic details and policy persons of a self-funded policy where the parent customer is the policy holder.
A parent customer who is associated with the fully-insured group policy	The **Policy** tab displays the following: • List of fully-insured group policies to which the parent customer or its bill groups are associated.

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If you are viewing the 360° information of...	Then...
	Note: The system lists only those policies of the bill groups where the parent customer is associated as a policy holder. • Basic details, policy persons, and policy plans of a fully-insured group policy to which the parent customer or its bill group is associated.
A bill group who is associated with the self-funded policy	The **Policy** tab displays the following: • List of self-funded policies to which the bill group is associated. • Basic details and policy persons of a self-funded policy.
A bill group who is associated with the fully-insured group policy	The **Policy** tab displays the following: • List of fully-insured group policies to which the bill group is associated. • Basic details, policy persons, and policy plans of a fully-insured group policy.
A person whose person type is neither **Parent Customer** nor **Bill Group**	The **Policy** tab displays the following: • List of fully-insured group or self-funded policies to which the person is associated. • Basic details, policy persons, and policy plans of a self-funded or fully-insured group policy.

It contains the following zones:

- Policy List on page 635

Note: The **Policy List** zone appears when there is more than one policy associated with the person.

- Policy Information on page 636
- Policy Persons on page 640
- Policy Plans on page 640

Note: The **Policy Plans** zone appears when you are viewing the 360° information of a person who is associated with the fully-insured group policy.

Related Topics

For more information on...	See...
How to view the 360° information of a policy	Viewing the 360° Information of a Policy on page 603

Policy List

If you are viewing 360° information of a parent customer, the **Policy List** zone lists the policies to which the parent customer and its bill groups are associated. Note that the system lists the policies of all effective child persons whose person type is set to **Bill Group** and who are related to the parent customer using a relationship type which is specified in the **Person Relationship Type** option type of the **C1-ASOBLLNG** feature configuration.

Note: The system lists only those policies of the bill groups where the parent customer is associated as a policy holder.

If you are viewing 360° information of a bill group, the **Policy List** zone lists the policies to which the bill group is associated. If you are viewing 360° information of a person who is neither a parent customer nor a bill group, the **Policy**

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List zone lists the policies to which the person is associated. This zone appears when there is more than one policy associated with the person. It contains the following columns:

Column Name	Column Description
Policy Number	Displays the policy number.
Policy Information	Displays information about the policy. **Note:** It has a link. On clicking the link, the **Policy** screen appears where you can view the details of the respective policy.
Policy Type	Indicates the type of the policy.
Status	Indicates the status of the policy.
Start Date	Displays the date from when the policy is effective.
End Date	Displays the date till when the policy is effective.

Note: Pagination is used to display limited number of records in this zone. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

On clicking the **Broadcast** (📡) icon corresponding to a policy, the following zones appear in the **Policy** tab:

- Policy Information
- Policy Persons
- Policy Plans

You can filter the list using various search criteria (such as, **Policy Number**, **Start Date**, **Policy Type**, **End Date**, and **Status**) available in the **Filter** area. By default, the **Filter** area is hidden. You can view the **Filter** area by clicking the **Filters** (▽) icon in the upper right corner of this zone.

Related Topics

For more information on...	See...
How to setup the **C1-ASOBLLNG** feature configuration	Setting the C1-ASOBLLNG Feature Configuration on page 4417
Policy Information zone	Policy Information on page 636
Policy Persons zone	Policy Persons on page 640
Policy Plans zone	Policy Plans on page 640

Policy Information

The **Policy Information** zone displays the details of the policy. It contains the following sections:

- **Main** - Displays the basic information about the policy. It contains the following fields:

Field Name	Field Description
Base Policy Information	Displays information about the base policy. **Note:** This field appears when you are viewing the details of a renewed policy which is created using a policy type where the policy category is set to **Self-Funded**.
Policy Information	Displays information about the policy.

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Field Name	Field Description
	Note: It has a link. On clicking the link, the **Policy** screen appears where you can view the details of the respective policy.
Policy Type	Indicates the policy type using which the policy is created.
	Note: It has a link. On clicking the link, the **Policy Type** screen appears where you can view the details of the respective policy type.
Source System	Indicates the external system from where the policy is originated.
Policy Number	Displays the policy number.
Status	Indicates the status of the policy. If the policy is created using the **C1-POLICY** business object, the valid values are: • Pending • In Force/Active • Pending Cancellation • Canceled • Pending Reinstatement • Reinstated • Pending Termination • Terminated However, if the policy is created using the **C1-ASOPolicy** business object, the valid values are: • Pending • In Force/Active • Runout • Post Runout
Status Reason	Indicates the reason why the policy is terminated.
	Note: It has a link. On clicking the link, the **Status Reason** screen appears where you can view the details of the respective termination reason. This field appears when you are viewing the details of a terminated or reinstated policy which is created using a policy type where the policy category is set to **Fully-Insured Group** or **Fully-Insured Individual**.
Start Date	Displays the date from when the policy is effective.
End Date	Displays the date till when the policy is effective.
Renewal Date	Displays the date when the policy is renewed.
	Note: This field appears when you are viewing the details of a policy which is renewed.
Paid Through Date	Indicates the term end date of the last fully or partially paid term. The system considers the term to be fully paid when the threshold limit is met.

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<table>
<tr><th>Field Name</th><th>Field Description</th></tr>
<tr><td></td><td>
Note:
This field appears when the following conditions are met:
• When you are viewing the details of a policy which is created using a policy type where the policy category is set to Fully-Insured Group or Fully-Insured Individual.
• When the paid through date is calculated at the policy level.

The paid through date is calculated while freezing or canceling a payment or adjustment depending on whether the required algorithm is attached to the respective system event:
<table>
<tr><th>Entity</th><th>System Event</th><th>Algorithm</th></tr>
<tr><td>Customer Class</td><td>Payment Freeze</td><td>C1-PSPTDCAL</td></tr>
<tr><td>Customer Class</td><td>Payment Cancellation</td><td>C1-PXPTDCAL</td></tr>
<tr><td>Adjustment Type</td><td>Adjustment Freeze</td><td>C1-ADPTDCAL</td></tr>
<tr><td>Adjustment Type</td><td>Adjustment Cancellation</td><td>C1-AXPTDCAL</td></tr>
</table>
The following table indicates when the paid through date is calculated at the policy and/or membership level:
<table>
<tr><th>If the Paid Through Date Calculation Level parameter is set to…</th><th>If the following characteristics are defined for the billable charge or adjustment…</th><th>Then…</th></tr>
<tr><td>P</td><td>C1-POLID</td><td>Paid through date is calculated at the policy level</td></tr>
<tr><td>P</td><td>C1-MPID</td><td>Paid through date is calculated at the policy level</td></tr>
<tr><td>P</td><td>C1-POLID and C1-MPID</td><td>Paid through date is calculated at the policy level</td></tr>
<tr><td>M</td><td>C1-POLID</td><td>Paid through date is not calculated at the membership level</td></tr>
<tr><td>M</td><td>C1-MPID</td><td>Paid through date is calculated at the membership level</td></tr>
<tr><td>M</td><td>C1-POLID and C1-MPID</td><td>Paid through date is calculated at the membership level</td></tr>
<tr><td>P, M</td><td>C1-POLID</td><td>Paid through date is calculated at the policy level</td></tr>
<tr><td>P, M</td><td>C1-MPID</td><td>Paid through date is calculated at both the policy and membership levels</td></tr>
</table>
</td></tr>
</table>

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<table>
<tr><th>Field Name</th><th>Field Description</th></tr>
<tr><td></td><td>
<table>
<tr><th>If the Paid Through Date Calculation Level parameter is set to…</th><th>If the following characteristics are defined for the billable charge or adjustment…</th><th>Then…</th></tr>
<tr><td>P, M</td><td>C1-POLID and C1-MPID</td><td>Paid through date is calculated at both the policy and membership levels</td></tr>
</table>
</td></tr>
<tr><td>Runout End Date</td><td>Displays the date when the runout period of the self-funded policy ends.

Note: This field appears when you are viewing the details of a policy which is created using a policy type where the policy category is set to Self-Funded.</td></tr>
<tr><td>Runout Administration Fees</td><td>Indicates whether the administration fees must be charged when the claim transaction for the self-funded policy is processed in the runout period. The valid values are:
• None
• Percentage of Claim

Note: This field appears when you are viewing the details of a policy which is created using a policy type where the policy category is set to Self-Funded.</td></tr>
<tr><td>Advance Level Funding Eligibility</td><td>Indicates whether the self-funded policy is eligible for advance billing feature of level funding.

Note: This field appears when you are viewing the details of a policy which is created using a policy type where the policy category is set to Self-Funded.</td></tr>
<tr><td>Advance Deposit Applicability</td><td>Indicates whether the advance deposit is applicable for the policy.

Note: This field appears only when the policy is created using a policy type where the policy category is set to Fully-Insured Group.</td></tr>
<tr><td>Advance Deposit Amount</td><td>Displays the advance deposit amount.

Note: This field appears only when the Advance Deposit Applicability option is selected.</td></tr>
<tr><td>Advance Deposit Grace Days</td><td>Displays the grace days used for calculating the advance deposit grace period.

Note: This field appears only when the Advance Deposit Applicability option is selected.</td></tr>
<tr><td>Advance Deposit Account</td><td>Indicates the account of the parent customer where the advance deposit is parked for the policy. In addition, a context menu (⊙) icon appears corresponding to this field which helps in navigating to other screens in the application.</td></tr>
</table>

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Field Name	Field Description
	Note: This field appears only when the **Advance Deposit Applicability** option is selected. It has a link. On clicking the link, the **Account** screen appears where you can view the details of the respective account.

- **Characteristics** - Lists the characteristics defined for the policy. It contains the following columns:

Column Name	Column Description
Effective Date	Displays the date from when the characteristic is effective for the policy.
Characteristic Type	Indicates the characteristic type.
Characteristic Value	Displays the value of the characteristic type.

Policy Persons

The **Policy Persons** zone lists the persons associated with the policy. It contains the following columns:

Column Name	Column Description
Person Name	Indicates the person who is associated with the policy.
Policy Person Role	Indicates the role of the person with respect to the policy.
Start Date	Displays the date from when the person is associated with the policy.
End Date	Displays the date till when the person is associated with the policy.

Note: Pagination is used to display limited number of records in this zone. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

You can view the 360° information of a policy person by clicking the **View** (🔗) icon corresponding to the person in the **Policy Persons** zone.

Policy Plans

The **Policy Plans** zone lists the plans defined in the policy. It appears when you are viewing the 360° information of a person who is associated with the fully-insured group policy. It contains the following columns:

Column Name	Column Description
Policy Plan Information	Displays information about the policy plan. In addition, this column has a context menu which helps in navigating to other screens in the application. **Note:** It has a link. On clicking the link, the **Policy Plan** screen appears where you can view the details of the respective policy plan.
Start Date	Displays the date from when the policy plan is effective.
End Date	Displays the date till when the policy plan is effective.
Plan Name	Indicates the plan to which the policy belongs.
Benefit Type	Indicates the benefit type of the policy plan. The valid values are:

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Column Name	Column Description
	• Commercial • Medicare Affiliated
No. of Subscribers	Indicates the number of main subscribers in the policy plan.
No. of Members	Indicates the number of members in the policy plan.

Note: Pagination is used to display limited number of records in this zone. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

You can filter the list using various search criteria (such as, **Plan Start Date** and **Plan End Date**) available in the **Filter** area. By default, the **Filter** area is hidden. You can view the **Filter** area by clicking the **Filters** (▽) icon in the upper right corner of this zone.

Customer 360° Information - Pricing Information

The following table provides information about the **Pricing Information** tab:

If you are viewing the 360° information of...	Then...
A parent customer who is associated with the self-funded policy	The **Pricing Information** tab displays the following: • Basic details of the pricing rules which are defined for the parent customer. • Summarized tree view listing each bill group of the parent customer and the bill groups' self-funded policies and pricing rules. • Basic details of the self-funded policies which are associated with each bill group of the parent customer. • Basic details of the pricing rules which are defined for the self-funded policies of each bill group. • Basic details of the active pricing groups which are defined for each bill group. • Basic information about the approval transactions which are created while defining, editing, and deleting the parent customer's and bill groups' pricing rules.
A bill group who is associated with the self-funded policy	The **Pricing Information** tab displays the following: • Summarized tree view listing the parent customer and pricing rules which are defined for the parent customer. • Basic details of the self-funded policies which are associated with the bill group. • Basic details of the pricing rules which are defined for the self-funded policies of the bill group. • Basic details of the active pricing groups which are defined for the bill group. • Basic information about the approval transactions which are created while defining, editing, and deleting the pricing rules of the bill group.
A parent customer who is associated with the fully-insured group policy	The **Pricing Information** tab displays the following:

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If you are viewing the 360° information of...	Then...
	• Basic details of the pricing rules which are defined for different entities (such as parent customer, fully-insured group policy, policy plan, and state of issue). • Summarized tree view listing the pricing rules which are defined for the parent customer, fully-insured group policies, and policy plans. • Basic information about the approval transactions which are created while defining, editing, and deleting the pricing rules for different entities.
A bill group who is associated with the fully-insured group policy	The **Pricing Information** tab displays the following: • Basic details of the pricing rules which are defined for different entities (such as parent customer, fully-insured group policy, policy plan, and state of issue). • Basic information about the approval transactions which are created while defining, editing, and deleting the pricing rules for different entities.
A person whose person type is neither **Parent Customer** nor **Bill Group**	No data appears in the **Pricing Information** tab.

It contains the following zones:

- Parent Customer Pricing Rules on page 643

  Note: The **Parent Customer Pricing Rules** zone appears when you are viewing 360° information of a parent customer or bill group who is associated with the self-funded policy.
- Bill Group Self-Funded Policy Pricing Rule Summary on page 646

  Note: The **Bill Group Self-Funded Policy Pricing Rule Summary** zone appears when you are viewing 360° information of a parent customer who is associated with the self-funded policy.
- Parent Customer Pricing Rule Summary on page 647

  Note: The **Parent Customer Pricing Rule Summary** zone appears when you are viewing 360° information of a bill group who is associated with the self-funded policy.
- Bill Group Self-Funded Policy Information on page 648

  Note: The **Bill Group Self-Funded Policy Information** zone appears when you are viewing 360° information of a parent customer or bill group who is associated with the self-funded policy.
- Bill Group Self-Funded Policy Pricing Rules on page 649

  Note: The **Bill Group Self-Funded Policy Pricing Rules** zone appears when you are viewing 360° information of a parent customer or bill group who is associated with the self-funded policy.
- Bill Group Pricing Groups on page 653

  Note: The **Bill Group Pricing Groups** zone appears when you are viewing 360° information of a bill group who is associated with the self-funded policy.
- Fully-Insured Pricing Rules on page 654

  Note: The **Fully-Insured Pricing Rules** zone appears when you are viewing 360° information of a parent customer or bill group who is associated with the fully-insured group policy.
- Pricing Rule Summary on page 656

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> **Note:** The **Pricing Rule Summary** zone appears when you are viewing 360° information of a parent customer who is associated with the fully-insured group policy.

- Pricing Rule Approval Transactions on page 656

> **Note:** The **Pricing Rule Approval Transactions** zone appears when you are viewing 360° information of a parent customer or bill group who is associated with the fully-insured group or self-funded policy.

Related Topics

For more information on...	See...
How to view the pricing information of a parent customer	Viewing the Pricing Information of a Parent Customer on page 603
How to view the pricing information of a bill group	Viewing the Pricing Information of a Bill Group on page 605
How to setup the **C1-ASOBLLNG** feature configuration	Setting the C1-ASOBLLNG Feature Configuration on page 4417

Parent Customer Pricing Rules

The **Parent Customer Pricing Rules** zone lists the pricing rules which are defined for the parent customer. It appears when you are viewing 360° information of a parent customer or bill group who is associated with the self-funded policy. It contains the following columns:

Column Name	Column Description
Pricing Rule Type	Indicates the pricing rule type using which the pricing rule is created. **Note:** It has a link. On clicking the link, the **Pricing Rule Type** screen appears where you can view the details of the respective pricing rule type.
Pricing Rule Information	Displays information about the pricing rule. **Note:** It has a link. On clicking the link, the **Pricing Rule** screen appears where you can view the details of the respective pricing rule.
Price Item Information	Indicates the price item for which the pricing rule is created. **Note:** It has a link. On clicking the link, the **Price Item** screen appears where you can view the details of the respective price item.
Start Date	Displays the date from when the pricing rule is effective.
End Date	Displays the date till when the pricing rule is effective.
Status	Indicates the status of the pricing rule. The valid values are: • Active • Disaggregation Initiated • Inactive • Pending
Edit	On clicking the **Edit** (✎) icon, the following screen appears where you can edit the details of the respective pricing rule:

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<table>
<tr><th>Column Name</th><th>Column Description</th></tr>
<tr><td></td><td>
<table>
<tr><th>If you are editing...</th><th>Then the following screen appears...</th></tr>
<tr><td>A claim pricing rule</td><td>Claim Pricing Rule</td></tr>
<tr><td>A specific stop-loss pricing rule</td><td>Specific Stop-Loss (SSL) Pricing Rule</td></tr>
<tr><td>An aggregate stop-loss pricing rule</td><td>Aggregate Stop-Loss (ASL) Pricing Rule</td></tr>
<tr><td>A retention type claim based pricing rule</td><td>Retention Type Claim Based Pricing Rule</td></tr>
<tr><td>A retention type enrollment based pricing rule</td><td>Retention Type Enrollment Based Pricing Rule</td></tr>
<tr><td>An ancillary pricing rule</td><td>Ancillary Pricing Rule</td></tr>
<tr><td>A discount arrangement pricing rule</td><td>Discount Arrangement Pricing Rule</td></tr>
<tr><td>A level funded pricing rule</td><td>Level Funded (LF) Pricing Rule</td></tr>
</table>
</td></tr>
<tr><td>Delete</td><td>On clicking the Delete (🗑) icon, you can delete the pricing rule.
Note: You can delete a pricing rule only when it is not yet used in the system.</td></tr>
<tr><td>Price List Information</td><td>Indicates the price list that contains the price item pricing which is created through the pricing rule.
Note: It has a link. On clicking the link, the Price List screen appears where you can view the details of the respective price list.</td></tr>
</table>

Note: Pagination is used to display limited number of records in this zone. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

You can define a new pricing rule for the parent customer by clicking the **Add** link in the upper right corner of this zone.

You can filter the list using various search criteria (such as, **Price Item**, **Start Date**, **Pricing Rule Type**, **End Date**, and **Status**) available in the **Filter** area. By default, the **Filter** area is hidden. You can view the **Filter** area by clicking the **Filters** (▽) icon in the upper right corner of this zone.

You can change the layout of this zone. For more information on how to change the layout, see Changing the Layout on page 4410.

Related Topics

For more information on...	See...
How to view the pricing rules defined for a parent customer	Viewing the Pricing Rules Defined for a Self-Funded Parent Customer on page 669
How to define a claim pricing rule for a parent customer	Defining a Claim Pricing Rule for a Parent Customer on page 2984
How to edit a claim pricing rule of a parent customer	Editing a Claim Pricing Rule of a Parent Customer on page 2993
How to delete a claim pricing rule of a parent customer	Deleting a Claim Pricing Rule of a Parent Customer on page 2996

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For more information on...	See...
How to view the details of a claim pricing rule defined for a parent customer	Viewing a Claim Pricing Rule of a Parent Customer on page 2995
How to define a specific stop-loss pricing rule for a parent customer	Defining a Specific Stop-Loss Pricing Rule for a Parent Customer on page 3015
How to edit a specific stop-loss pricing rule of a parent customer	Editing a Specific Stop-Loss Pricing Rule of a Parent Customer on page 3023
How to delete a specific stop-loss pricing rule of a parent customer	Deleting a Specific Stop-Loss Pricing Rule of a Parent Customer on page 3026
How to view the details of a specific stop-loss pricing rule defined for a parent customer	Viewing a Specific Stop-Loss Pricing Rule of a Parent Customer on page 3026
How to define an aggregate stop-loss pricing rule for a parent customer	Defining an Aggregate Stop-Loss Pricing Rule for a Parent Customer on page 3049
How to edit an aggregate stop-loss pricing rule of a parent customer	Editing an Aggregate Stop-Loss Pricing Rule of a Parent Customer on page 3057
How to delete an aggregate stop-loss pricing rule of a parent customer	Deleting an Aggregate Stop-Loss Pricing Rule of a Parent Customer on page 3060
How to view the details of an aggregate stop-loss pricing rule defined for a parent customer	Viewing an Aggregate Stop-Loss Pricing Rule of a Parent Customer on page 3060
How to define a retention type claim based pricing rule for a parent customer	Defining a Retention Type Claim Based Pricing Rule for a Parent Customer on page 3080
How to edit a retention type claim based pricing rule of a parent customer	Editing a Retention Type Claim Based Pricing Rule of a Parent Customer on page 3084
How to delete a retention type claim based pricing rule of a parent customer	Deleting a Retention Type Claim Based Pricing Rule of a Parent Customer on page 3087
How to view the details of a retention type claim based pricing rule defined for a parent customer	Viewing a Retention Type Claim Based Pricing Rule of a Parent Customer on page 3097
How to define a retention type enrollment based pricing rule for a parent customer	Defining a Retention Type Enrollment Based Pricing Rule for a Parent Customer on page 3106
How to edit a retention type enrollment based pricing rule of a parent customer	Editing a Retention Type Enrollment Based Pricing Rule of a Parent Customer on page 3110
How to delete a retention type enrollment based pricing rule of a parent customer	Deleting a Retention Type Enrollment Based Pricing Rule of a Parent Customer on page 3112
How to view the details of a retention type enrollment based pricing rule defined for a parent customer	Viewing a Retention Type Enrollment Based Pricing Rule of a Parent Customer on page 3123

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For more information on...	See...
How to define an ancillary pricing rule for a parent customer	Defining an Ancillary Pricing Rule for a Parent Customer on page 3197
How to edit an ancillary pricing rule of a parent customer	Editing an Ancillary Pricing Rule of a Parent Customer on page 3202
How to delete an ancillary pricing rule of a parent customer	Deleting an Ancillary Pricing Rule of a Parent Customer on page 3205
How to view the details of an ancillary pricing rule defined for a parent customer	Viewing an Ancillary Pricing Rule of a Parent Customer on page 3200
How to define a discount arrangement pricing rule for a parent customer	Defining a Discount Arrangement Pricing Rule for a Parent Customer on page 3233
How to edit a discount arrangement pricing rule of a parent customer	Editing a Discount Arrangement Pricing Rule of a Parent Customer on page 3240
How to delete a discount arrangement pricing rule of a parent customer	Deleting a Discount Arrangement Pricing Rule of a Parent Customer on page 3242
How to view the details of a discount arrangement pricing rule defined for a parent customer	Viewing the Discount Arrangement Pricing Rule Details of a Parent Customer on page 3243
How to define a level funded pricing rule for a parent customer	Defining a Level Funded Pricing Rule for a Parent Customer on page 3265
How to edit a level funded pricing rule of a parent customer	Editing a Level Funded Pricing Rule of a Parent Customer on page 3267
How to delete a level funded pricing rule of a parent customer	Deleting a Level Funded Pricing Rule of a Parent Customer on page 3269
How to view the details of a level funded pricing rule defined for a parent customer	Viewing the Details of a Level Funded Pricing Rule Defined for a Policy of a Parent Customer on page 3270

Bill Group Self-Funded Policy Pricing Rule Summary

The **Bill Group Self-Funded Policy Pricing Rule Summary** zone lists the following in a tree structure:

- Information string of each effective child person whose person type is set to **Bill Group**) and who is related to the parent customer using a relationship type which is specified in the **Person Relationship Type** option type of the **C1-ASOBLLNG** feature configuration
- Information string of each policy to which the bill group is associated.
- Information string of each pricing rule defined for the bill group.

It appears when you are viewing 360° information of a parent customer who is associated with the self-funded policy. It contains the following column:

Column Name	Column Description
Hierarchy	Displays information about the bill group, policy, and pricing rule in a tree structure. A pricing rule node has a link. On clicking the link, the following screen appears where you can edit the details of the respective pricing rule:

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Column Name	Column Description
	On clicking... / **Then the following screen appears...** A claim pricing rule → Claim Pricing Rule A specific stop-loss pricing rule → Specific Stop-Loss (SSL) Pricing Rule An aggregate stop-loss pricing rule → Aggregate Stop-Loss (ASL) Pricing Rule A retention type claim based pricing rule → Retention Type Claim Based Pricing Rule A retention type enrollment based pricing rule → Retention Type Enrollment Based Pricing Rule A one-time flat fee pricing rule → Flat Fee Pricing Rule A bill period based recurring flat fee pricing rule → Flat Fee Pricing Rule A frequency based recurring flat fee pricing rule → Flat Fee Pricing Rule An ancillary pricing rule → Ancillary Pricing Rule A level funded pricing rule → Level Funded (LF) Pricing Rule

Related Topics

For more information on...	See...
How to setup the **C1-ASOBLLNG** feature configuration	Setting the C1-ASOBLLNG Feature Configuration on page 4417

Parent Customer Pricing Rule Summary

The **Parent Customer Pricing Rule Summary** zone lists the following in a tree structure:

- Information string of an effective parent person whose person type is set to **Parent Customer**
- Information string of each pricing rule which is defined for the parent customer

It appears when you are viewing 360° information of a bill group who is associated with the self-funded policy. It contains the following column:

Column Name	Column Description
Hierarchy	Displays information about the parent customer and its pricing rules in a tree structure. A pricing rule node has a link. On clicking the link, the following screen appears where you can edit the details of the respective pricing rule: **On clicking...** / **Then the following screen appears...** A claim pricing rule → Claim Pricing Rule A specific stop-loss pricing rule → Specific Stop-Loss (SSL) Pricing Rule An aggregate stop-loss pricing rule → Aggregate Stop-Loss (ASL) Pricing Rule A retention type claim based pricing rule → Retention Type Claim Based Pricing Rule A retention type enrollment based pricing rule → Retention Type Enrollment Based Pricing Rule

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Column Name	Column Description	
	On clicking...	**Then the following screen appears...**
	An ancillary pricing rule	Ancillary Pricing Rule
	A discount arrangement pricing rule	Discount Arrangement Pricing Rule
	A level funded pricing rule	Level Funded (LF) Pricing Rule

Related Topics

For more information on...	See...
How to setup the **C1-ASOBLLNG** feature configuration	Setting the C1-ASOBLLNG Feature Configuration on page 4417

Bill Group Self-Funded Policy Information

The **Bill Group Self-Funded Policy Information** zone appears when you are viewing 360° information of a parent customer or bill group who is associated with the self-funded policy. If you are viewing the 360° information of a parent customer, the **Bill Group Self-Funded Policy Information** zone lists the policies to which each bill group of the parent customer is associated. However, if you are viewing the 360° information of a bill group, the **Bill Group Self-Funded Policy Information** zone lists the policies to which the bill group is associated. It contains the following columns:

Column Name	Column Description
Bill Group Information	Indicates the bill group to which the policy is associated. **Note:** It has a link. On clicking the link, the **Person** screen appears where you can view the details of the respective bill group (i.e. person).
Policy Information	Displays information about the policy. **Note:** It has a link. On clicking the link, the **Policy** screen appears where you can view the details of the respective policy.
Renew	On clicking the **Renew** (⎘) icon, the **Policy** screen appears where you can renew the policy. **Note:** The **Renew** icon appears when the policy is in the **In Force/Active** status and it is not yet renewed.
Policy Number	Displays the policy number.
Start Date	Displays the date from when the policy is effective.
End Date	Displays the date till when the policy is effective.
Status	Indicates the status of the policy. The valid values are: • Pending • In Force/Active • Runout • Post Runout
Runout End Date	Displays the date when the runout period of the policy ends.
Renewal Date	Displays the date when the policy is renewed.

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Column Name	Column Description
	Note: The data appears in this column when the policy is renewed.

Note: Pagination is used to display limited number of records in this zone. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

On clicking the **Broadcast** (ᯤ) icon corresponding to a bill group and policy combination, the **Bill Group Self-Funded Policy Pricing Rules** and **Bill Group Pricing Groups** zones appear.

You can filter the list using various search criteria (such as, **Bill Group Name**, **Policy Start Date**, and **Policy End Date**) available in the **Filter** area. By default, the **Filter** area is hidden. You can view the **Filter** area by clicking the **Filters** (⧩) icon in the upper right corner of this zone.

Related Topics

For more information on...	See...
Bill Group Self-Funded Policy Pricing Rules zone	Bill Group Self-Funded Policy Pricing Rules on page 649
Bill Group Pricing Groups zone	Bill Group Pricing Groups on page 653
How to view the pricing rules defined for a self-funded policy of a bill group	Viewing the Pricing Rules Defined for a Self-Funded Policy of a Bill Group on page 669
How to view the pricing groups of a bill group	Viewing the Pricing Groups of a Bill Group on page 670

Bill Group Self-Funded Policy Pricing Rules

The **Bill Group Self-Funded Policy Pricing Rules** zone lists the pricing rules which are defined for a policy of a bill group. It appears when you are viewing 360° information of a parent customer or bill group who is associated with the self-funded policy. It contains the following columns:

Column Name	Column Description
Pricing Rule Type	Indicates the pricing rule type using which the pricing rule is created.
	Note: It has a link. On clicking the link, the **Pricing Rule Type** screen appears where you can view the details of the respective pricing rule type.
Pricing Rule Information	Displays information about the pricing rule.
	Note: It has a link. On clicking the link, the **Pricing Rule** screen appears where you can view the details of the respective pricing rule.
Price Item Information	Indicates the price item for which the pricing rule is created.
	Note: It has a link. On clicking the link, the **Price Item** screen appears where you can view the details of the respective price item.
Start Date	Displays the date from when the pricing rule is effective.
End Date	Displays the date till when the pricing rule is effective.
Status	Indicates the status of the pricing rule. The valid values are: • Active • Disaggregation Initiated

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<table>
<tr><th>Column Name</th><th>Column Description</th></tr>
<tr><td></td><td>• Inactive
• Pending</td></tr>
<tr><td>Edit</td><td>On clicking the Edit (✎) icon, the following screen appears where you can edit the details of the respective pricing rule:
<table><tr><th>If you are editing...</th><th>Then the following screen appears...</th></tr><tr><td>A claim pricing rule</td><td>Claim Pricing Rule</td></tr><tr><td>A specific stop-loss pricing rule</td><td>Specific Stop-Loss (SSL) Pricing Rule</td></tr><tr><td>An aggregate stop-loss pricing rule</td><td>Aggregate Stop-Loss (ASL) Pricing Rule</td></tr><tr><td>A retention type claim based pricing rule</td><td>Retention Type Claim Based Pricing Rule</td></tr><tr><td>A retention type enrollment based pricing rule</td><td>Retention Type Enrollment Based Pricing Rule</td></tr><tr><td>A one-time flat fee pricing rule</td><td>Flat Fee Pricing Rule</td></tr><tr><td>A bill period based recurring flat fee pricing rule</td><td>Flat Fee Pricing Rule</td></tr><tr><td>A frequency based recurring flat fee pricing rule</td><td>Flat Fee Pricing Rule</td></tr><tr><td>An ancillary pricing rule</td><td>Ancillary Pricing Rule</td></tr><tr><td>A level funded pricing rule</td><td>Level Funded (LF) Pricing Rule</td></tr></table></td></tr>
<tr><td>Delete</td><td>On clicking the Delete (🗑) icon, you can delete the pricing rule.
Note: You can delete a pricing rule only when it is not yet used in the system.</td></tr>
<tr><td>Pricing Group Information</td><td>Indicates the pricing group which is used while defining the pricing rule.</td></tr>
<tr><td>Price List Information</td><td>Indicates the price list that contains the price item pricing which is created through the pricing rule.
Note: It has a link. On clicking the link, the Price List screen appears where you can view the details of the respective price list.</td></tr>
</table>

Note: Pagination is used to display limited number of records in this zone. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

By default, the **Bill Group Self-Funded Policy Pricing Rules** zone does not appear in the **Pricing** tab of the **Customer 360° Information** screen. It appears when you click the **Broadcast** (📡) icon corresponding to a bill group and policy combination in the **Bill Group Self-Funded Policy Information** zone.

You can define a new pricing rule for the bill group by clicking the **Add** link in the upper right corner of this zone.

You can filter the list using various search criteria (such as, **Price Item**, **Start Date**, **Pricing Rule Type**, **End Date**, and **Status**) available in the **Filter** area. By default, the **Filter** area is hidden. You can view the **Filter** area by clicking the **Filters** (▽) icon in the upper right corner of this zone.

You can change the layout of this zone. For more information on how to change the layout, see Changing the Layout on page 4410.

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Related Topics

For more information on...	See...
How to define a claim pricing rule for a policy of a bill group	Defining a Claim Pricing Rule for a Bill Group on page 2996
How to edit a claim pricing rule defined for a policy of a bill group	Editing a Claim Pricing Rule of a Bill Group on page 3002
How to delete a claim pricing rule defined for a policy of a bill group	Deleting a Claim Pricing Rule of a Bill Group on page 3005
How to view the details of a claim pricing rule defined for a policy of a bill group	Viewing a Claim Pricing Rule of a Bill Group on page 3004
How to define a claim pricing rule for a policy of a bill group using a pricing group	Defining a Claim Pricing Rule for a Bill Group Using a Pricing Group on page 2999
How to define a specific stop-loss pricing rule for a policy of a bill group	Defining a Specific Stop-Loss Pricing Rule for a Bill Group on page 3027
How to edit a specific stop-loss pricing rule defined for a policy of a bill group	Editing a Specific Stop-Loss Pricing Rule of a Bill Group on page 3036
How to delete a specific stop-loss pricing rule defined for a policy of a bill group	Deleting a Specific Stop-Loss Pricing Rule of a Bill Group on page 3038
How to view the details of a specific stop-loss pricing rule defined for a policy of a bill group	Viewing a Specific Stop-Loss Pricing Rule of a Bill Group on page 3038
How to define a specific stop-loss pricing rule for a policy of a bill group using a pricing group	Defining a Specific Stop-Loss Pricing Rule for a Bill Group Using a Pricing Group on page 3033
How to define an aggregate stop-loss pricing rule for a policy of a bill group	Defining an Aggregate Stop-Loss Pricing Rule for a Bill Group on page 3061
How to edit an aggregate stop-loss pricing rule defined for a policy of a bill group	Editing an Aggregate Stop-Loss Pricing Rule of a Bill Group on page 3069
How to delete an aggregate stop-loss pricing rule defined for a policy of a bill group	Deleting an Aggregate Stop-Loss Pricing Rule of a Bill Group on page 3072
How to view the details of an aggregate stop-loss pricing rule defined for a policy of a bill group	Viewing an Aggregate Stop-Loss Pricing Rule of a Bill Group on page 3071
How to define an aggregate stop-loss pricing rule for a policy of a bill group using a pricing group	Defining an Aggregate Stop-Loss Pricing Rule for a Bill Group Using a Pricing Group on page 3067
How to define a retention type claim based pricing rule for a policy of a bill group	Defining a Retention Type Claim Based Pricing Rule for a Bill Group on page 3088
How to edit a retention type claim based pricing rule defined for a policy of a bill group	Editing a Retention Type Claim Based Pricing Rule of a Bill Group on page 3091
How to delete a retention type claim based pricing rule defined for a policy of a bill group	Deleting a Retention Type Claim Based Pricing Rule of a Bill Group on page 3093

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For more information on...	See...
How to view the details of a retention type claim based pricing rule defined for a policy of a bill group	Viewing a Retention Type Claim Based Pricing Rule of a Bill Group on page 3098
How to define a retention type claim based pricing rule for a policy of a bill group using a pricing group	Defining a Retention Type Claim Based Pricing Rule for a Bill Group Using a Pricing Group on page 3094
How to define a retention type enrollment based pricing rule for a policy of a bill group	Defining a Retention Type Enrollment Based Pricing Rule for a Bill Group on page 3113
How to edit a retention type enrollment based pricing rule defined for a policy of a bill group	Editing a Retention Type Enrollment Based Pricing Rule of a Bill Group on page 3117
How to delete a retention type enrollment based pricing rule defined for a policy of a bill group	Deleting a Retention Type Enrollment Based Pricing Rule of a Bill Group on page 3119
How to view the details of a retention type enrollment based pricing rule defined for a policy of a bill group	Viewing a Retention Type Enrollment Based Pricing Rule of a Bill Group on page 3124
How to define a retention type enrollment based pricing rule for a policy of a bill group using a pricing group	Defining a Retention Type Enrollment Based Pricing Rule for a Bill Group Using a Pricing Group on page 3120
How to define a one-time flat fees pricing rule for a policy of a bill group	Defining a One-Time Flat Fee Pricing Rule for a Bill Group on page 3134
How to edit a one-time flat fees pricing rule defined for a policy of a bill group	Editing a One-Time Flat Fee Pricing Rule of a Bill Group on page 3137
How to delete a one-time flat fees pricing rule defined for a policy of a bill group	Deleting a One-Time Flat Fee Pricing Rule of a Bill Group on page 3139
How to view the details of a one-time flat fees pricing rule defined for a policy of a bill group	Viewing a One-Time Flat Fee Pricing Rule of a Bill Group on page 3139
How to define a bill period based recurring flat fees pricing rule for a policy of a bill group	Defining a Bill Period Based Recurring Flat Fee Pricing Rule for a Bill Group on page 3148
How to edit a bill period based recurring flat fees pricing rule defined for a policy of a bill group	Editing a Bill Period Based Recurring Flat Fee Pricing Rule of a Bill Group on page 3151
How to delete a bill period based recurring flat fees pricing rule defined for a policy of a bill group	Deleting a Bill Period Based Recurring Flat Fee Pricing Rule of a Bill Group on page 3154
How to view the details of a bill period based recurring flat fees pricing rule defined for a policy of a bill group	Viewing a Bill Period Based Recurring Flat Fee Pricing Rule of a Bill Group on page 3153
How to define a frequency based recurring flat fees pricing rule for a policy of a bill group	Defining a Frequency Based Recurring Flat Fee Pricing Rule for a Bill Group on page 3162

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For more information on...	See...
How to edit a frequency based recurring flat fees pricing rule defined for a policy of a bill group	Editing a Frequency Based Recurring Flat Fee Pricing Rule of a Bill Group on page 3165
How to delete a frequency based recurring flat fees pricing rule defined for a policy of a bill group	Deleting a Frequency Based Recurring Flat Fee Pricing Rule of a Bill Group on page 3168
How to view the details of a frequency based recurring flat fees pricing rule defined for a policy of a bill group	Viewing a Frequency Based Recurring Flat Fee Pricing Rule of a Bill Group on page 3167
How to define an ancillary pricing rule for a policy of a bill group	Defining an Ancillary Pricing Rule for a Bill Group on page 3205
How to edit an ancillary pricing rule defined for a policy of a bill group	Editing an Ancillary Pricing Rule of a Bill Group on page 3210
How to delete an ancillary pricing rule defined for a policy of a bill group	Deleting an Ancillary Pricing Rule of a Bill Group on page 3213
How to view the details of an ancillary pricing rule defined for a policy of a bill group	Viewing an Ancillary Pricing Rule of a Bill Group on page 3208
How to define an ancillary pricing rule for a policy of a bill group using a pricing group	Defining an Ancillary Pricing Rule for a Bill Group Using a Pricing Group
How to define a level funded pricing rule for a policy of a bill group	Defining a Level Funded Pricing Rule for a Bill Group on page 3278
How to edit a level funded pricing rule defined for a policy of a bill group	Editing a Level Funded Pricing Rule of a Bill Group on page 3280
How to delete a level funded pricing rule defined for a policy of a bill group	Deleting a Level Funded Pricing Rule Defined for a Policy of a Bill Group
How to view the details of a level funded pricing rule defined for a policy of a bill group	Viewing the Details of a Level Funded Pricing Rule Defined for a Policy of a Bill Group
How to define a level funded pricing rule for a policy of a bill group using a pricing group	Defining a Level Funded Pricing Rule for a Bill Group on page 3278

Bill Group Pricing Groups

The **Bill Group Pricing Groups** zone lists the pricing groups which are defined for the bill group. By default, the active pricing groups are listed in this zone. It appears when you are viewing 360° information of a bill group who is associated with the self-funded policy. It contains the following columns:

Column Name	Column Description
Pricing Group	Indicates the pricing group which is created for the bill group.
Status	Indicates the status of the pricing group. The valid values are: • Active • Inactive

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Column Name	Column Description
Edit	On clicking the **Edit** (✎) icon, the **Pricing Group** screen appears where you can edit the details of the pricing group.
Delete	On clicking the **Delete** (🗑) icon, you can delete the pricing group.
	Note: You can delete a pricing group when it is not yet used while defining a pricing rule for the bill group.
Duplicate	On clicking the **Duplicate** (⧉) icon, the **Pricing Group** screen appears where you can define a new pricing group using an existing pricing group.
Associated Price Items	Indicates the price items whose pricing is defined using the pricing group.
Rules	Indicates the number of rules defined in the respective pricing group.

Note: Pagination is used to display limited number of records in this zone. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

By default, the **Bill Group Pricing Groups** zone does not appear in the **Pricing** tab of the **Customer 360° Information** screen. It appears when you click the **Broadcast** (📡) icon corresponding to a bill group in the **Bill Group Self-Funded Policy Information** zone.

You can define a new pricing group for the bill group by clicking the **Add** link in the upper right corner of this zone.

You can filter the list using the **Show All** field available in the **Filter** area. By default, the **Filter** area is hidden. You can view the **Filter** area by clicking the **Filters** (▽) icon in the upper right corner of this zone.

Note: If you select the **Yes** option from the **Show All** list, the system lists both the active and inactive pricing groups in the **Bill Group Pricing Groups** zone.

You can change the layout of this zone. For more information on how to change the layout, see Changing the Layout on page 4410.

Related Topics

For more information on...	See...
How to define a pricing group for a bill group	Defining a Pricing Group for a Bill Group on page 2934
How to edit a pricing group of a bill group	Editing a Pricing Group of a Bill Group on page 2936
How to copy a pricing group of a bill group	Copying a Pricing Group of a Bill Group on page 2939
How to delete a pricing group of a bill group	Deleting a Pricing Group of a Bill Group on page 2939

Fully-Insured Pricing Rules

The **Fully-Insured Pricing Rules** zone appears when you are viewing 360° information of a parent customer or bill group who is associated with the fully-insured group policy. If you are viewing the 360° information of a parent customer, the **Fully-Insured Pricing Rules** zone lists:

- Age based or tier based pricing rules defined for the parent customer's or its bill groups' fully-insured group policy plans
- Additional fee pricing rules defined for the parent customer

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- Additional fee pricing rules defined for the fully-insured group policies and policy plans of the parent customer and its bill groups
- Additional fee pricing rules defined for the states where the fully-insured group policy, its policy plans, and memberships are issued

However, if you are viewing the 360° information of a bill group, the **Fully-Insured Pricing Rules** zone lists:

- Age based or tier based pricing rules defined for the bill group's fully-insured group policy plans
- Additional fee pricing rules defined for the parent customer
- Additional fee pricing rules defined for the fully-insured group policies and policy plans of the parent customer and the bill group
- Additional fee pricing rules defined for the states where the fully-insured group policy, its policy plans, and memberships are issued

It contains the following columns:

Column Name	Column Description
Pricing Rule Type	Indicates the pricing rule type using which the pricing rule is created. **Note:** It has a link. On clicking the link, the **Pricing Rule Type** screen appears where you can view the details of the respective pricing rule type.
Pricing Rule Information	Displays information about the pricing rule. **Note:** It has a link. On clicking the link, the **Pricing Rule** screen appears where you can view the details of the respective pricing rule.
Price Item Information	Indicates the price item for which the pricing rule is created. **Note:** It has a link. On clicking the link, the **Price Item** screen appears where you can view the details of the respective price item.
Pricing Level	Indicates the level at which the pricing rule is defined. The valid values are: • Parent Customer • Plan • Policy • State
Entity Information	Indicates the fully-insured group policy, policy plan, parent customer, or state for which the pricing rule is defined.
Start Date	Displays the date from when the pricing rule is effective.
End Date	Displays the date till when the pricing rule is effective.
Price List Information	Indicates the price list that contains the price item pricing which is created through the pricing rule. **Note:** It has a link. On clicking the link, the **Price List** screen appears where you can view the details of the respective price list.

Note: Pagination is used to display limited number of records in this zone. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

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You can filter the list using various search criteria (such as, **Price Item**, **Start Date**, **Pricing Rule Type**, **End Date**, **Status**, and **Pricing Level**) available in the **Filter** area. By default, the **Filter** area is hidden. You can view the **Filter** area by clicking the **Filters** (▽) icon in the upper right corner of this zone.

Related Topics

For more information on...	See...
How to view the pricing rules defined for a fully-insured group policy	Viewing the Pricing Rules Defined for a Fully-Insured Group Policy on page 675
How to view the pricing rules defined for a parent customer	Viewing the Pricing Rules Defined for a Fully-Insured Parent Customer on page 676
How to view the pricing rules defined for a fully-insured policy plan	Viewing the Pricing Rules Defined for a Fully-Insured Group Policy Plan on page 674
How to view the pricing rules defined for a state where the fully-insured group policy, its policy plan, or membership is issued	Viewing the Pricing Rules Defined for the State of Issue on page 676

Pricing Rule Summary

The **Pricing Rule Summary** zone lists the following in a tree structure:

- Information string of the parent customer
- Information string of the pricing rule defined for the parent customer
- Information string of each fully-insured group policy where the parent customer is associated
- Information string of the pricing rule defined for the fully-insured group policy of the parent customer
- Information string of each plan defined for the fully-insured group policy of the parent customer
- Information string of the pricing rule defined for the fully-insured group policy plans

It appears when you are viewing 360° information of a parent customer who is associated with the fully-insured group policy. It contains the following column:

Column Name	Column Description
Hierarchy	Displays information about the parent customer, fully-insured group policies, policy plans, and pricing rules in a tree structure.

Pricing Rule Approval Transactions

The **Pricing Rule Approval Transactions** zone lists the following information:

If you are viewing the 360° information of...	Then...
A parent customer who is associated with the self-funded policy	The **Pricing Rule Approval Transactions** zone lists the approval transactions which are created while defining, editing, and deleting the parent customer's and bill groups' pricing rules.
A bill group who is associated with the self-funded policy	The **Pricing Rule Approval Transactions** zone lists the approval transactions which are created while defining, editing, and deleting the pricing rules of the bill group.
A parent customer who is associated with the fully-insured group policy	The **Pricing Rule Approval Transactions** zone lists the approval transactions which are created while defining, editing, and deleting the pricing rules of different entities (such as parent customer, fully-insured group policy, policy plans, and state of issue).

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If you are viewing the 360° information of...	Then...
A bill group who is associated with the fully-insured group policy	The **Pricing Rule Approval Transactions** zone lists the approval transactions which are created while defining, editing, and deleting the pricing rules of different entities (such as parent customer, fully-insured group policy, policy plans, and state of issue).

It contains the following columns:

Column Name	Column Description
Submitted On	Displays the date and time when the approval transaction is created by the submitter.
Approval Transaction ID	Displays the approval transaction ID. **Note:** It has a link. On clicking the link, the **Comparison: New versus Existing** screen appears where you can review and accordingly approve, reject, or revert the changes.
Pricing Level	Indicates whether the approval transaction is created for a pricing rule which is defined at the parent customer or bill group level. The valid values are: • Parent Customer • Bill Group
Person Name	Indicates the person for whom the pricing rule is created.
Pricing Rule Type	Indicates the pricing rule type using which the pricing rule is created.
Price Item Information	Indicates the price item for which the pricing rule is created. **Note:** It has a link. On clicking the link, the **Price Item** screen appears where you can view the details of the respective price item.
Start Date	Displays the date from when the pricing rule is effective.
End Date	Displays the date till when the pricing rule is effective.
Approval Status	Indicates the status of the approval transaction. The valid values are: • Approved • Cancelled • Deleted • Inprocess • Pending • Rejected
Action	Indicates the type of action performed by the submitter on the pricing rule. The valid values are: • Add • Update • Delete
Submitted By	Indicates the user who has performed the action on the pricing rule.
Assigned To	Indicates the user to whom the approval transaction is manually assigned for review.
Approved/Rejected By	Indicates the user who has approved or rejected the approval transaction.

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Note: Pagination is used to display limited number of records in this zone. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

You can filter the list using various search criteria (such as, **Status**, **Assigned To**, and **Price Item**) available in the **Filter** area. By default, the **Filter** area is hidden. You can view the **Filter** area by clicking the **Filters** (▽) icon in the upper right corner of this zone.

Defining a Sort ID for a Bill Group

Prerequisites

To define a sort ID for a bill group, you should have:

- Effective child persons whose person type is set to **Bill Group** and who are related to the parent customer using a relationship type which is specified in the **Person Relationship Type** option type of the **C1-ASOBLLNG** feature configuration

Procedure

To define a sort ID for a bill group:

1. Search for a person whose person type is set to **Parent Customer** in the **Customer 360° View** screen.
2. In the **Search Results** section, click the **View** (🔗) icon corresponding to the person whose details you want to view. The **Person** tab appears in the **Customer 360° Information** screen.
3. Expand the **Bill Group Sorting** zone.

   Note: The **Bill Group Sorting** zone appears when you are viewing the 360° information of a person whose person type is set to **Parent Customer**.
4. Click the **Add** link in the upper right corner of the **Bill Group Sorting** zone.

   The **Bill Group Sorting** screen appears. It contains the following field:

Field Name	Field Description
Parent Customer	Indicates the parent customer whose bill groups' sort IDs you want to define.

In addition, it contains the following fields in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Bill Group Information	Used to indicate the bill group for whom you want to define the sort ID. **Note:** The values appear in this list when there are effective child persons whose person type is set to **Bill Group** and who are related to the parent customer using a relationship type which is specified in the **Person Relationship Type** parameter of the **C1-ASOBLLNG** feature configuration.	Yes
Description	Used to specify the description for the sort ID.	Yes
Sort ID	Used to specify the sort ID.	Yes
Start Date	Used to specify the date from when the sort ID is effective for the bill group.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The start date cannot be later than the end date.	
End Date	Used to specify the date till when the sort ID is effective for the bill group. **Note:** The end date cannot be earlier than the start date.	No

5. Enter the required details in the grid.
6. If you want to define more than one sort ID for a bill group, click the **Add** (+) icon and then repeat step 5.

Note: However, if you want to remove a sort ID of a bill group, click the **Delete** (🗑) icon corresponding to the bill group and sort ID combination.

7. Click **Save**.
   A sort ID is defined for the bill group.

Related Topics

For more information on...	See...
How to search for a person	Searching for a Person on page 597
Customer 360° Information screen	Customer 360° Information on page 607
Person tab	Customer 360° Information - Person on page 609
Bill Group Sorting zone	Bill Group Sorting on page 618
How to setup the **C1-ASOBLLNG** feature configuration	Setting the C1-ASOBLLNG Feature Configuration on page 4417

Editing a Sort ID of a Bill Group

Procedure

To edit a sort ID of a bill group:

1. Search for a person whose person type is set to **Parent Customer** in the **Customer 360° View** screen.
2. In the **Search Results** section, click the **View** (🔗) icon corresponding to the person whose details you want to view.
   The **Person** tab appears in the **Customer 360° Information** screen.
3. Expand the **Bill Group Sorting** zone.

Note: The **Bill Group Sorting** zone appears when you are viewing the 360° information of a person whose person type is set to **Parent Customer**.

4. In the **Bill Group Sorting** zone, select the check box corresponding to the bill group and sort ID combination whose details you want to edit.

Note: If you want to edit all sort IDs of effective bill groups, you need to select the check box corresponding to the column header. In such case, the system considers only those records which are present on the respective page for editing.

5. Click **Edit**.

   The **Bill Group Sorting** screen appears. It contains the following field:

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Field Name	Field Description
Parent Customer	Indicates the parent customer whose bill groups' sort IDs you want to edit.

In addition, it contains the following fields in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Bill Group Information	Indicates the bill group whose sort ID you want to edit.	Not applicable
Description	Used to specify the description for the sort ID.	Yes
Sort ID	Displays the sort ID.	Not applicable
Start Date	Used to specify the date from when the sort ID is effective for the bill group. **Note:** The start date cannot be later than the end date. The start date cannot be later than the effective date specified in the derivation and pricing parameters which are defined for the bill group and sort ID combination.	Yes
End Date	Used to specify the date till when the sort ID is effective for the bill group. **Note:** The end date cannot be earlier than the start date. The end date cannot be earlier than the effective date specified in the derivation and pricing parameters which are defined for the bill group and sort ID combination.	No

6. Modify the details of a bill group's sort ID, if required.
7. Click **Save**.
   The changes made to the bill group's sort ID are saved.

Related Topics

For more information on...	See...
How to search for a person	Searching for a Person on page 597
Customer 360° Information screen	Customer 360° Information on page 607
Person tab	Customer 360° Information - Person on page 609
Bill Group Sorting zone	Bill Group Sorting on page 618

Deleting a Sort ID of a Bill Group

Procedure

To delete a sort ID of a bill group:

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1. Search for a person whose person type is set to **Parent Customer** in *t*he **Customer 360° View** screen.
2. In the **Search Results** section, click the **View** (🔗) icon corresponding to the person whose details you want *t*o view. The **Person** tab appears in the **Customer 360° Information** screen.
3. Expand the **Bill Group Sorting** zone.

> **Note:** The **Bill Group Sorting** zone appears when you are viewing the 360° information of a person whose person type is set to **Parent Customer**.

4. In the **Bill Group Sorting** zone, select the check box corresponding to the bill group and sort ID combination *t*hat you want to delete.

> **Note:** If you want to delete all sort IDs of effective bill groups, you need to select the check box corresponding to the column header. In such case, the system considers only those records which are present on the respective page for deleting.

5. Click **Delete**.

   A message appears confirming whether you want to delete the bill group's sort ID.

> **Note:** You can delete a bill group's sort ID when the derivation and pricing parameters are not yet defined for the bill group and sort ID combination.

6. Click **OK**.
   The bill group's sort ID is deleted.

Related Topics

For more information on...	See...
How to search for a person	Searching for a Person on page 597
Customer 360° Information screen	Customer 360° Information on page 607
Person tab	Customer 360° Information - Person on page 609
Bill Group Sorting zone	Bill Group Sorting on page 618

Creating a Bill Group Sorting Upload Request

Procedure

To create a bill group sorting upload request:

1. Search for a person whose person type is set to **Parent Customer** in *t*he **Customer 360° View** screen.
2. In the **Search Results** section, click the **View** (🔗) icon corresponding to the person whose details you want *t*o view. The **Person** tab appears in the **Customer 360° Information** screen.
3. Expand the **Bill Group Sorting** zone.

> **Note:** The **Bill Group Sorting** zone appears when you are viewing the 360° information of a person whose person type is set to **Parent Customer**.

4. Click the **Upload** link in the upper right corner of the **Bill Group Sorting** zone.

   The **Select Upload Request Type** screen appears. It contains the following field:

Field Name	Field Description	Mandatory (Yes or No)
Upload Request Type	Used to indicate the upload request type using which you want to create the upload request.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The list includes only those upload request types where the upload request business object with the **Upload Type** option type set to **BG** is selected.	

Note: The **Select Upload Request Type** screen appears when there are multiple upload request types where the upload request business object with the **Upload Type** option type set to **BG** is selected. If there is only one such upload request type defined in the application, the **Bill Group Sorting Upload Request** screen appears.

5. Select the required upload request type from the respective field.
6. Click **OK**.

The **Bill Group Sorting Upload Request** screen appears. It contains the following sections:

- **Main** - Used to specify basic details about the upload request.
- **Characteristics** - Used to define the characteristics for the upload request.

The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Upload Request Type	Indicates the upload request type using which the bill group sorting upload request will be created.	Not applicable
Parent Customer	Used to indicate the person for whom you want to create the bill group sorting upload request. **Note:** By default, the parent customer's ID appears in this field. You can change the person, if required. The system allows you to create a bill group sorting upload request for a person whose person type is set to **Parent Customer**. The **Search** (🔍) icon appears corresponding to this field. On clicking the **Search** icon, the **Person Search** window appears.	Yes
File Name	Used to specify the name and path of the file that you want to upload. **Note:** You can also click the **Browse** button corresponding to this field to browse to the location where the file is available in the system.	Yes
Replace Existing File	Used to indicate whether you want to replace any existing file in the system. You must select this check box when you want to upload the same file once again.	No

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Field Name	Field Description	Mandatory (Yes or No)
Comments	Used to specify additional information about the upload request.	No

7. Click the **Browse** button corresponding to the **File Name** field.
   The **Choose File to Upload** dialog box appears.
8. Browse to the location where the file that you want to upload is available in the system.
9. Click **Open**.
   The file name along with the path appears in the **File Name** field.
10. Select the **Replace Existing File** check box depending on whether you want to upload the same file once *a*gain in the system.
11. Define characteristics for the upload request, if required.
12. Click **Save**.
    A message appears indicating the number of records which are successfully uploaded. Then, a bill group sorting upload request is created in the **Draft** status. If the bill group ID is available in the record, the status of the record is set to **Pending**. However, if the system could not derive the bill group ID using the bill group identifier type and bill group identifier combination when the bill group ID is not specified in the record, the status of the record is set to **Invalid**.

Related Topics

For more information on...	See...
How to search for a person	Searching for a Person on page 597
Customer 360° Information screen	Customer 360° Information on page 607
Person tab	Customer 360° Information - Person on page 609
Bill Group Sorting zone	Bill Group Sorting on page 618
How to define a characteristic for an upload request	Defining a Characteristic for an Upload Request on page 2172

Defining the Derivation and Pricing Parameters for a Bill Group and Sort ID Combination

Prerequisites

To define the derivation and pricing parameters for a bill group and sort ID combination, you should have:

- Effective child persons whose person type is set to **Bill Group** and who are related to the parent customer using a relationship type which is specified in the **Person Relationship Type** option type of the **C1-ASOBLLNG** feature configuration
- Sort ID defined for the bill group
- Values defined for the **C1-SourceSystemLookup** extendable lookup

Procedure

To define the derivation and pricing parameters for a bill group and sort ID combination:

1. Search for a person whose person type is set to **Parent Customer** in *t*he **Customer 360° View** screen.
2. In the **Search Results** section, click the **View** (🔗) icon corresponding to the person whose details you want *t*o view.
   The **Person** tab appears in the **Customer 360° Information** screen.
3. Expand the **Bill Group Derivation and Pricing Parameters** zone.

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Note: The **Bill Group Derivation and Pricing Parameters** zone appears when you are viewing the 360° information of a person whose person type is set to **Parent Customer**.

4. Click the **Add** link in the upper right corner of the **Bill Group Derivation and Pricing Parameters** zone.

   The **Bill Group Derivation and Pricing Parameters** screen appears. It contains the following field:

Field Name	Field Description
Parent Customer	Indicates the parent customer whose bill groups' derivation and pricing parameters you want to define.

In addition, it contains the following fields in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Source System	Used to indicate the source system from where the claim and enrollment transactions are received.	Yes
Parameter 1	Used to specify the employee attribute based on which you want to derive the bill group. **Note:** You must not specify the ampersand (&) character in this field.	Yes
Parameter 2	Used to specify the employee attribute based on which you want to derive the bill group. **Note:** You must not specify the ampersand (&) character in this field.	No
Parameter 3	Used to specify the employee attribute based on which you want to derive the bill group. **Note:** You must not specify the ampersand (&) character in this field.	No
Parameter 4	Used to specify the employee attribute based on which you want to derive the bill group. **Note:** You must not specify the ampersand (&) character in this field.	No
Effective Date	Used to specify the date from when the derivation and pricing parameters are effective for the bill group and sort ID combination. **Note:** The effective date must be within the date range of the sort ID defined for the bill group.	Yes
Status	Indicates the status of the derivation and pricing parameters for the bill group and sort ID combination. The valid values are: • Active • Inactive	Not applicable

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Field Name	Field Description	Mandatory (Yes or No)
	Note: By default, the value is set to **Active**.	
Bill Group Information	Used to indicate the bill group for whom you want to define the derivation and pricing parameters.	Yes
	Note: The values appear in this list when there are effective child persons whose person type is set to **Bill Group** and who are related to the parent customer using a relationship type which is specified in the **Person Relationship Type** parameter of the **C1-ASOBLLNG** feature configuration.	
Sort ID	Used to indicate the sort ID of the bill group for which you want to define the derivation and pricing parameters.	Yes
	Note: The **Search** (🔍) icon appears corresponding to this field. On clicking the **Search** icon, the **Sort ID Search** window appears.	

5. Enter the required details in the grid.
6. If you want to define the derivation and pricing parameters for more than one bill group and sort ID combination, *c*lick the **Add** (➕) icon and then repeat step 5.

Note: However, if you want to remove the derivation and pricing parameters of a bill group and sort ID combination, click the **Delete** (🗑) icon corresponding to the bill group and sort ID combination.

7. Click **Save**.
   The derivation and pricing parameters are defined for the bill group and sort ID combination.

Related Topics

For more information on...	See...
How to search for a person	Searching for a Person on page 597
Customer 360° Information screen	Customer 360° Information on page 607
Person tab	Customer 360° Information - Person on page 609
Bill Group Derivation and Pricing Parameters zone	Bill Group Derivation and Pricing Parameters on page 616
How to setup the **C1-ASOBLLNG** feature configuration	Setting the C1-ASOBLLNG Feature Configuration on page 4417

Editing the Derivation and Pricing Parameters of a Bill Group and Sort ID Combination

Procedure

To edit the derivation and pricing parameters of a bill group and sort ID combination:

1. Search for a person whose person type is set to **Parent Customer** in *t*he **Customer 360° View** screen.
2. In the **Search Results** section, click the **View** (🔗) icon corresponding to the person whose details you want *t*o view.
   The **Person** tab appears in the **Customer 360° Information** screen.

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3. Expand the **Bill Group Derivation and Pricing Parameters** zone.

> **Note:** The **Bill Group Derivation and Pricing Parameters** zone appears when you are viewing the 360° information of a person whose person type is set to **Parent Customer**.

4. In the **Bill Group Derivation and Pricing Parameters** zone, select the check box corresponding to the bill group and sort ID combination whose details you want to edit.

> **Note:** If you want to edit the derivation and pricing parameters of all bill group and sort ID combinations, you need to select the check box corresponding to the column header. In such case, the system considers only those records which are present on the respective page for editing.

5. Click **Edit**.

   The **Bill Group Derivation and Pricing Parameters** screen appears. It contains the following field:

Field Name	Field Description
Parent Customer	Indicates the parent customer whose bill groups' derivation and pricing parameters you want to edit.

   In addition, it contains the following fields in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Source System	Indicates the source system from where the claim and enrollment transactions are received.	Not applicable
Parameter 1	Indicates the employee attribute based on which you want to derive the bill group.	Not applicable
Parameter 2	Indicates the employee attribute based on which you want to derive the bill group.	Not applicable
Parameter 3	Indicates the employee attribute based on which you want to derive the bill group.	Not applicable
Parameter 4	Indicates the employee attribute based on which you want to derive the bill group.	Not applicable
Effective Date	Displays the date from when the derivation and pricing parameters are effective for the bill group and sort ID combination.	Not applicable
Status	Used to indicate the status of the derivation and pricing parameters for the bill group and sort ID combination. The valid values are: • Active • Inactive	Yes
Bill Group Information	Indicates the bill group for whom the derivation and pricing parameters are defined.	Not applicable
Sort ID	Indicates the sort ID of the bill group for which the derivation and pricing parameters are defined.	Not applicable

6. If required, you can inactivate the derivation and pricing parameters of a bill group and sort ID combination.
7. Click **Save**.
   The changes made to the derivation and pricing parameters of a bill group and sort ID combination are saved.

Related Topics

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For more information on...	See...
How to search for a person	Searching for a Person on page 597
Customer 360° Information screen	Customer 360° Information on page 607
Person tab	Customer 360° Information - Person on page 609
Bill Group Derivation and Pricing Parameters zone	Bill Group Derivation and Pricing Parameters on page 616

Creating a Bill Group Derivation and Pricing Parameters Upload Request

Procedure

To create a bill group derivation and pricing parameters upload request:

1. Search for a person whose person type is set to **Parent Customer** in the **Customer 360° View** screen.
2. In the **Search Results** section, click the **View** (🔗) icon corresponding to the person whose details you want to view. The **Person** tab appears in the **Customer 360° Information** screen.
3. Expand the **Bill Group Derivation and Pricing Parameters** zone.

   Note: The **Bill Group Derivation and Pricing Parameters** zone appears when you are viewing the 360° information of a person whose person type is set to **Parent Customer**.
4. Click the **Upload** link in the upper right corner of the **Bill Group Derivation and Pricing Parameters** zone.

   The **Select Upload Request Type** screen appears. It contains the following field:

Field Name	Field Description	Mandatory (Yes or No)
Upload Request Type	Used to indicate the upload request type using which you want to create the upload request. **Note:** The list includes only those upload request types where the upload request business object with the **Upload Type** option type set to **BL** is selected.	Yes

   Note: The **Select Upload Request Type** screen appears when there are multiple upload request types where the upload request business object with the **Upload Type** option type set to **BL** is selected. If there is only one such upload request type defined in the application, the **Bill Group Derivation and Pricing Parameters Upload Request** screen appears.
5. Select the required upload request type from the respective field.
6. Click **OK**.

   The **Bill Group Derivation and Pricing Parameters Upload Request** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details about the upload request.
   - **Characteristics** - Used to define the characteristics for the upload request.

   The **Main** section contains the following fields:

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Field Name	Field Description	Mandatory (Yes or No)
Upload Request Type	Indicates the upload request type using which the bill group derivation and pricing parameters upload request will be created.	Not applicable
Parent Customer	Used to indicate the person for whom you want to create the bill group derivation and pricing parameters upload request. **Note:** By default, the parent customer's ID appears in this field. You can change the person, if required. The system allows you to create a bill group derivation and pricing parameters upload request for a person whose person type is set to **Parent Customer**. The **Search** (🔍) icon appears corresponding to this field. On clicking the **Search** icon, the **Person Search** window appears.	Yes
File Name	Used to specify the name and path of the file that you want to upload. **Note:** You can also click the **Browse** button corresponding to this field to browse to the location where the file is available in the system.	Yes
Replace Existing File	Used to indicate whether you want to replace any existing file in the system. You must select this check box when you want to upload the same file once again.	No
Comments	Used to specify additional information about the upload request.	No

7. Click the **Browse** button corresponding to the **File Name** field.
   The **Choose File to Upload** dialog box appears.
8. Browse to the location where the file that you want to upload is available in the system.
9. Click **Open**.
   The file name along with the path appears in the **File Name** field.
10. Select the **Replace Existing File** check box depending on whether you want to upload the same file once *a*gain in the system.
11. Define characteristics for the upload request, if required.
12. Click **Save**.
    A message appears indicating the number of records which are successfully uploaded. Then, a bill group derivation and pricing parameters upload request is created in the **Draft** status. If the bill group ID is available in the record, the status of the record is set to **Pending**. However, if the system could not derive the bill group ID using the bill group identifier type and bill group identifier combination when the bill group ID is not specified in the record, the status of the record is set to **Invalid**.

Related Topics

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For more information on...	See...
How to search for a person	Searching for a Person on page 597
Customer 360° Information screen	Customer 360° Information on page 607
Person tab	Customer 360° Information - Person on page 609
Bill Group Derivation and Pricing Parameters zone	Bill Group Derivation and Pricing Parameters on page 616
How to define a characteristic for an upload request	Defining a Characteristic for an Upload Request on page 2172

Viewing the Pricing Rules Defined for a Self-Funded Policy of a Bill Group

Procedure

To view the pricing rules defined for a self-funded policy of a bill group:

1. Search for the bill group whose is associated with the self-funded policy in the **Customer 360° View** screen.
2. In the **Search Results** section, click the **View** (🔗) icon corresponding to the bill group *w*hose details you want to view.
   The **Person** tab appears in the **Customer 360° Information** screen.
3. Click the **Pricing Information** tab.
   The **Pricing Information** tab appears.
4. In the **Bill Group Self-Funded Policy Information** zone, click the **Broadcast** (📡) icon corresponding to a *b*ill group and policy combination whose details you want to view.
   The **Bill Group Self-Funded Policy Pricing Rules** and **Bill Group Pricing Groups** zones appear.
5. View the pricing rules which are defined for the self-funded policy of the bill group in the **Bill Group Self-Funded Policy Pricing Rules** zone.

Related Topics

For more information on...	See...
How to search for a person	Searching for a Person on page 597
Customer 360° Information screen	Customer 360° Information on page 607
Pricing Information tab	Customer 360° Information - Pricing Information on page 641
Bill Group Self-Funded Policy Information zone	Bill Group Self-Funded Policy Information on page 648
Bill Group Self-Funded Policy Pricing Rules zone	Bill Group Self-Funded Policy Pricing Rules on page 649

Viewing the Pricing Rules Defined for a Self-Funded Parent Customer

Procedure

To view the pricing rules defined for a self-funded parent customer:

1. Search for the parent customer who is associated with the self-funded policy in the **Customer 360° View** screen.
2. In the **Search Results** section, click the **View** (🔗) icon corresponding to the parent customer *w*hose details you want to view.
   The **Person** tab appears in the **Customer 360° Information** screen.
3. Click the **Pricing Information** tab.

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The **Pricing Information** tab appears.

4. View the pricing rules which are defined for the self-funded parent customer in the **Parent Customer Pricing Rules** zone.

Related Topics

For more information on...	**See...**
How to search for a person	Searching for a Person on page 597
Customer 360° Information screen	Customer 360° Information on page 607
Pricing Information tab	Customer 360° Information - Pricing Information on page 641
Parent Customer Pricing Rules zone	Parent Customer Pricing Rules on page 643

Viewing the Pricing Groups of a Bill Group

Procedure

To view the pricing groups of a bill group:

1. Search for the bill group whose is associated with the self-funded policy in the **Customer 360° View** screen.
2. In the **Search Results** section, click the **View** (🔗) icon corresponding to the bill group whose *d*etails you want to view.
   The **Person** tab appears in the **Customer 360° Information** screen.
3. Click the **Pricing Information** tab.
   The **Pricing Information** tab appears.
4. In the **Bill Group Self-Funded Policy Information** zone, click the **Broadcast** (📡) icon corresponding *t*o a bill group whose pricing groups you want to view.
   The **Bill Group Self-Funded Policy Pricing Rules** and **Bill Group Pricing Groups** zones appear.
5. View the pricing groups which are defined for the bill group and are currently active in the **Bill Group Pricing Groups** zone.

Related Topics

For more information on...	**See...**
How to search for a person	Searching for a Person on page 597
Customer 360° Information screen	Customer 360° Information on page 607
Pricing Information tab	Customer 360° Information - Pricing Information on page 641
Bill Group Self-Funded Policy Information zone	Bill Group Self-Funded Policy Information on page 648
Bill Group Pricing Groups zone	Bill Group Pricing Groups on page 653

Renewing a Self-Funded Policy of a Bill Group

Oracle Revenue Management and Billing enables you to renew a self-funded policy which is associated with a bill group. However, note that you can renew a self-funded policy when it is in the **In Force/Active** status and is not yet renewed. For more information, see Self-Funded Policy Renewal on page 339.

Procedure

To renew a self-funded policy of a bill group:

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1. Search for the bill group who is associated with the self-funded policy (which you want to renew) in the **Customer 360° View** screen.
2. In the **Search Results** section, click the **View** (🔗) icon corresponding to the bill group whose details you want *t*o view.
   The **Person** tab appears in the **Customer 360° Information** screen.
3. Click the **Pricing Information** tab.
   The **Pricing Information** tab appears.
4. In the **Bill Group Self-Funded Policy Information** zone, click the **Renew** (📋) icon in the **Renew** column *c*orresponding to the self-funded policy which you want to renew.

   The **Policy** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details about the renewed policy.
   - **Persons** - Used to associate or disassociate persons from the renewed policy.

     Note: You cannot disassociate persons who are associated with the base policy using a policy person role which is specified in the **Bill Group Policy Person Role** or **Parent Customer Policy Person Role** option type of the **C1-ASOBLLNG** feature configuration.
   - **Characteristics** - Used to define the characteristics for the renewed policy.

   The **Main** section contains the following fields:

Field Name	**Field Description**	**Mandatory (Yes or No)**
Base Policy Information	Indicates the policy which you want to renew.	Not applicable
Policy Type	Indicates the policy type using which the base policy is created.	Not applicable
Policy Number	Used to specify the policy number of the renewed policy.	Yes
Description	Used to specify the description for the renewed policy.	Yes
Start Date	Used to specify the date from when the renewed policy is effective. **Note:** By default, the start date is set to the base policy's end date plus one day. For example, if the base policy's end date is 12-31-2018, then by default, the renewed policy's start date is set to 01-01-2019. The start date cannot be later than the end date. The start date cannot be earlier than or equal to the base policy's end date.	Yes
End Date	Used to specify the date till when the renewed policy is effective. **Note:** The end date cannot be earlier than the start date.	Yes
Runout End Date	Used to specify the date when the runout period of the renewed policy ends. **Note:** The runout end date cannot be earlier than or equal to the renewed policy's end date.	No

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Field Name	Field Description	Mandatory (Yes or No)
Runout Administration Fees	Used to indicate whether the administration fees must be charged when the claim transaction for the policy is processed in the runout period. The valid values are: • None • Percentage of Claim **Note:** At present, this field is used only for the informational purposes and is not considered during the billable charge creation for the claim transactions which are received in the runout period of the policy.	No
Copy Pricing Rules	Used to indicate whether you want to copy the pricing rules of the base policy to the renewed policy. If you select the **Copy Pricing Rules** option, the system copies the following pricing rules of the base policy: • Claim • Retention Type Claim Based • Retention Type Enrollment Based • Recurring Flat Fees • Ancillary **Note:** While copying a pricing rule, the start and end dates of the new pricing rule are set to the renewed policy's start and end dates, respectively. If there are multiple pricing rules which are created using the same pricing rule type and are effective for the different date range, the system copies only one pricing rule from the base policy with the latest date range.	No
Copy Advance Level Funding Eligibility	Used to indicate whether you want to copy the advance level funding eligibility value of the base policy to the renewed policy. **Note:** If the **Copy Advance Level Funding Eligibility** option is set to **Y** in the base policy, the system activates the renewed self-funded policy on the policy renewal even if the renewed policy's start date is later than the system date. This field appears only when you want to renew a self-funded policy.	No

Note: The **Renew** icon appears when the policy is in the **In Force/Active** status and it is not yet renewed.

5. Enter the required details in the **Main** section.
6. Associate or disassociate persons from the renewed policy, if required.
7. Define, edit, or remove characteristics of the renewed policy, if required.

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8. Click **Save**.
   The renewed policy is created in the **Pending** status. The renewal date is stamped corresponding to the base policy in the **Bill Group Self-Funded Policy Information** zone.

Related Topics

For more information on...	See...
How to search for a person	Searching for a Person on page 597
Customer 360° Information screen	Customer 360° Information on page 607
Pricing Information tab	Customer 360° Information - Pricing Information on page 641
Bill Group Self-Funded Policy Information zone	Bill Group Self-Funded Policy Information on page 648
How to associate a person with a policy	Associating a Person with a Policy on page 244
How to define a characteristic for a policy	Defining a Characteristic for a Policy on page 246
How to setup the **C1-ASOBLLNG** feature configuration	Setting the C1-ASOBLLNG Feature Configuration on page 4417

Viewing the Bill Details

Procedure

To view the details of a bill:

1. Search for the account, whose bill details you want to view, in the **Customer 360° View** screen.
2. In the **Search Results** section, click the **View** (🔗) icon corresponding to the account whose details you want *t*o view.
   The **Account** tab appears in the **Customer 360° Information** screen.
3. In the **Open Bills** zone, click the **View** (🔗) icon corresponding to the bill whose details you want to view.
   The **Bill Information** screen appears.
4. View the basic details of the bill in the **Bill Information** zone.
5. View the adjustments which are swept onto the bill in the **Adjustments** zone.
6. View the activities, such as payment, transfer, offset, refund, or write off through which the bill is settled, in the **Settlement Activities** zone.
7. View the bill segment information, which is summarized based on the date range and price item combination, in the **Bill Segment Summary** zone.
8. View the details of the bill segments in the **Bill Segment Details** zone.
9. View the SQ details of the bill segment in the **SQ Details** zone.
10. View the calculation lines of the bill segment in the **Bill Segment Calculation Lines** zone.
11. View the transactions whose charges are billed through the bill segment in the **Transaction Details** zone.
12. View the calculation lines of all transaction legs (which are rated before billing) in the **Transaction Leg Calculation Lines** zone.
13. View the active hold requests due to which the bill is kept on hold in the **Hold Details** zone.
14. View the offset requests through which the bill is offset against another bill in the **Offset Details** zone.
15. View the refund and write off requests through which the bill or its bill segment is either refunded or written *o*ff in the **Refund and Write Off Details** zone.

Related Topics

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For more information on...	See...
How to search for an account	Searching for an Account on page 598
Customer 360° Information screen	Customer 360° Information on page 607
Account tab	Customer 360° Information - Account on page 620
Open Bills zone	Open Bills on page 627
Bill Information screen	Bill Information on page 677
Bill Information zone	Bill Information on page 678
Adjustments zone	Adjustments on page 678
Settlement Activities zone	Settlement Activities on page 678
Bill Segment Summary zone	Bill Segment Summary on page 679
Bill Segment Details zone	Bill Segment Details on page 679
SQ Details zone	SQ Details on page 681
Bill Segment Calculation Lines zone	Bill Segment Calculation Lines on page 681
Transaction Details zone	Transaction Details on page 682
Transaction Leg Calculation Lines zone	Transaction Leg Calculation Lines on page 683
Hold Details zone	Hold Details on page 633
Offset Details zone	Offset Details on page 685
Refund and Write Off Details zone	Refund and Write Off Details on page 685
How to view the SQ details of a bill segment	Viewing the SQ Details of a Bill Segment on page 686
How to view the calculation lines of a bill segment	Viewing the Calculation Lines of a Bill Segment on page 687
How to view the transactions whose charges are billed through a bill segment	Viewing the Transactions Whose Charges are Billed Through a Bill Segment on page 687
How to view the calculation lines of all legs of a transaction	Viewing the Calculation Lines of All Legs of a Transaction on page 688

Viewing the Pricing Rules Defined for a Fully-Insured Group Policy Plan

Procedure

To view the pricing rules defined for a fully-insured group policy plan:

1. Search for the fully-insured group policy in the **Customer 360° View** screen.
2. In the **Search Results** section, click the **View** (🔗) icon corresponding to the policy whose details you want *t*o view. The **Policy** tab appears in the **Customer 360° Information** screen.
3. Click the **Pricing Information** tab.

   The **Pricing Information** tab appears.

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Note:

By default, the **Fully-Insured Pricing Rules** zone lists the pricing rules which are defined for the following entities:

- Parent customer of the fully-insured group policy
- Fully-insured group policy
- Fully-insured group policy plans
- States where the fully-insured group policy and its policy plans and memberships are issued

4. Select the **Plan** option from the **Pricing Level** list in the **Fully-Insured Pricing Rules** zone.
5. Click **Search**.
   The pricing rules (if any) defined for the policy plans of the fully-insured group policy are listed in the **Fully-Insured Pricing Rules** zone.

Related Topics

For more information on...	See...
How to search for a policy	Searching for a Policy on page 599
Customer 360° Information screen	Customer 360° Information on page 607
Pricing Information tab	Customer 360° Information - Pricing Information on page 641
Fully-Insured Pricing Rules zone	Fully-Insured Pricing Rules on page 654

Viewing the Pricing Rules Defined for a Fully-Insured Group Policy

Procedure

To view the pricing rules defined for a fully-insured group policy:

1. Search for the fully-insured group policy in the **Customer 360° View** screen.
2. In the **Search Results** section, click the **View** (🔗) icon corresponding to the policy whose details you want *t*o view.
   The **Policy** tab appears in the **Customer 360° Information** screen.
3. Click the **Pricing Information** tab.

   The **Pricing Information** tab appears.

Note:

By default, the **Fully-Insured Pricing Rules** zone lists the pricing rules which are defined for the following entities:

- Parent customer of the fully-insured group policy
- Fully-insured group policy
- Fully-insured group policy plans
- States where the fully-insured group policy and its policy plans and memberships are issued

4. Select the **Policy** option from the **Pricing Level** list in the **Fully-Insured Pricing Rules** zone.
5. Click **Search**.
   The pricing rules (if any) defined for the fully-insured group policy are listed in the **Fully-Insured Pricing Rules** zone.

Related Topics

For more information on...	See...
How to search for a policy	Searching for a Policy on page 599

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For more information on...	See...
Customer 360° Information screen	Customer 360° Information on page 607
Pricing Information tab	Customer 360° Information - Pricing Information on page 641
Fully-Insured Pricing Rules zone	Fully-Insured Pricing Rules on page 654

Viewing the Pricing Rules Defined for a Fully-Insured Parent Customer

Procedure

To view the pricing rules defined for a fully-insured parent customer:

1. Search for the parent customer who is associated with the fully-insured group policy in the **Customer 360° View** screen.
2. In the **Search Results** section, click the **View** (🔗) icon corresponding to the parent customer whose details you want *t*o view.
   The **Person** tab appears in the **Customer 360° Information** screen.
3. Click the **Pricing Information** tab.

   The **Pricing Information** tab appears.

   Note:

   By default, the **Fully-Insured Pricing Rules** zone lists the pricing rules which are defined for the following entities:

   - Parent customer of the fully-insured group policy
   - Fully-insured group policy
   - Fully-insured group policy plans
   - States where the fully-insured group policy and its policy plans and memberships are issued
4. Select the **Parent Customer** option from the **Pricing Level** list in the **Fully-Insured Pricing Rules** zone.
5. Click **Search**.
   The pricing rules (if any) defined for the parent customer are listed in the **Fully-Insured Pricing Rules** zone.

Related Topics

For more information on...	See...
How to search for a person	Searching for a Person on page 597
Customer 360° Information screen	Customer 360° Information on page 607
Pricing Information tab	Customer 360° Information - Pricing Information on page 641
Fully-Insured Pricing Rules zone	Fully-Insured Pricing Rules on page 654

Viewing the Pricing Rules Defined for the State of Issue

Procedure

To view the pricing rules defined for the states where the fully-insured group policy, its policy plans, and memberships are issued:

1. Search for the fully-insured group policy in the **Customer 360° View** screen.
2. In the **Search Results** section, click the **View** (🔗) icon corresponding to the policy whose details you want *t*o view.

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The **Policy** tab appears in the **Customer 360° Information** screen.

3. Click the **Pricing Information** tab.

   The **Pricing Information** tab appears.

> **Note:**
>
> By default, the **Fully-Insured Pricing Rules** zone lists the pricing rules which are defined for the following entities:
>
> - Parent customer of the fully-insured group policy
> - Fully-insured group policy
> - Fully-insured group policy plans
> - States where the fully-insured group policy and its policy plans and memberships are issued

4. Select the **State** option from the **Pricing Level** list in the **Fully-Insured Pricing Rules** zone.
5. Click **Search**.
   The pricing rules (if any) defined for the states, where the fully-insured group policy, its policy plans, and memberships are issued, are listed in the **Fully-Insured Pricing Rules** zone.

Related Topics

For more information on...	**See...**
How to search for a policy	Searching for a Policy on page 599
Customer 360° Information screen	Customer 360° Information on page 607
Pricing Information tab	Customer 360° Information - Pricing Information on page 641
Fully-Insured Pricing Rules zone	Fully-Insured Pricing Rules on page 654

Bill Information

The **Bill Information** screen allows you to view:

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

It contains the following zones:

- Bill Information on page 678
- Adjustments on page 678
- Settlement Activities on page 678
- Bill Segment Summary on page 679
- Bill Segment Details on page 679
- SQ Details on page 681
- Bill Segment Calculation Lines on page 681
- Transaction Details on page 682
- Transaction Leg Calculation Lines on page 683
- Hold Details on page 633
- Offset Details on page 685

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- Refund and Write Off Details on page 685

Bill Information

The **Bill Information** zone displays the details of the bill. It contains the following section:

- **Main** - Displays the basic information about the bill. It contains the following fields:

Field Name	Field Description
Bill Information	Displays information about the bill. In addition, a context menu appears corresponding to this field which helps in navigating to other screens in the application.
	Note: It has a link. On clicking the link, the **Bill** screen appears where you can view the details of the respective bill.
Alternate Bill ID	Displays the alternate bill ID.
	Note: This field appears only when the respective data is available for the bill.
Account Information	Indicates the account for which the bill is generated. In addition, a context menu appears corresponding to this field which helps in navigating to other screens in the application.
	Note: It has a link. On clicking the link, the **Account** screen appears where you can view the details of the respective account.

Adjustments

The **Adjustments** zone lists the adjustments which are swept onto the bill. It contains the following columns:

Column Name	Column Description
Adjustment Information	Displays information about the adjustment.
	Note: It has a link. On clicking the link, the **Adjustment** screen appears where you can view the details of the respective adjustment.
Contract Information	Indicates the contract against which the adjustment is created. In addition, this column has a context menu which helps in navigating to other screens in the application.
	Note: It has a link. On clicking the link, the **Contract** screen appears where you can view the details of the respective contract.

Settlement Activities

You may settle a bill or its bill segment by making a payment, offsetting, refunding, writing off, or by reconciling against pay instructions. The **Settlement Activities** zone lists the activities related to the bill or its bill segment settlement. It contains the following columns:

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Column Name	Column Description
Activity Date	Displays the date when the settlement activity was performed in the system.
Activity Type	Indicates the type of the settlement activity. The valid values are: • Payment • Offset • Refund • Write Off • Transfer
Amount	Indicates the amount settled through the activity.
Related Object Information	Displays additional information about the settlement activity.
Related Object ID	Indicates the payment, offset request, refund request, write off request, or reconciliation adjustment which is created during settlement. **Note:** It has a link. On clicking the link, the **Payment**, **Offset Request**, **Refund Request**, **Write Off Request**, or **Adjustment** screen appears where you can view the details of the respective activity.

Bill Segment Summary

The system groups the bill segments with the same date range and price item combination and then provides the summarized information for each combination in the **Bill Segment Summary** zone. It contains the following columns:

Column Name	Column Description
Start Date	Displays the start date of the bill segments.
End Date	Displays the end date of the bill segments.
Policy Number	Indicates the policy for which the bill segments are generated.
Price Item Description	Indicates the price item for which the bill segments are generated.
Amount	Displays the sum of the bill segment amount.
Unpaid Amount	Displays the sum of the unpaid amount of the bill segments.

Note: Pagination is used to display limited number of records in this zone. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

Bill Segment Details

The **Bill Segment Details** zone displays the details of the bill segments which are included in the bill. It contains the following columns:

Column Name	Column Description
Start Date	Displays the start date of the bill segment.
End Date	Displays the end date of the bill segment.
Policy Number	Indicates the policy for which the bill segment is generated.

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Column Name	Column Description
Price Item Description	Displays the description of the price item.
Price Item	Indicates the price item for which the bill segment is generated.
Status	Indicates the status of the bill segment. The valid values are: • Incomplete • Error • Freezable • Pending Cancel • Frozen • Canceled
Amount	Displays the bill segment amount.
Billable Charge ID	Indicates the billable charge for which the bill segment is generated. **Note:** It has a link. On clicking the link, the **Billable Charge** screen appears where you can view the details of the respective billable charge.
Unpaid Amount	Displays the unpaid amount of the bill segment.
Price Item Parameters	Displays the concatenated string consisting of a list of parameters and their values based on which the price item pricing is defined.
External Membership ID	Indicates the membership for which the bill segment is generated.
Member's Primary Identifier	Displays the concatenated string consisting of member's primary identifier type and its value which are separated by a colon (:).
Member Name	Indicates the member for whom the bill segment is generated.
Plan Information	Indicates the plan to which the membership belongs. **Note:** It has a link. On clicking the link, the **Policy Plan** screen appears where you can view the details of the respective policy plan.
Auto Pay ID	Indicates the auto pay instruction through the automatic payment is created for the bill segment. **Note:** It has a link. On clicking the link, the **Auto Pay Instruction** screen appears where you can view the details of the respective auto pay instruction.
Bill Segment ID	Displays the bill segment ID. **Note:** It has a link. On clicking the link, the **Bill Segment** screen appears where you can view the details of the respective bill segment.

Note: Pagination is used to display limited number of records in this zone. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

On clicking the **View** (🔗) icon corresponding to a bill segment, the **Bill Segment** screen appears where you can view the additional details of the respective bill segment.

On clicking the **Broadcast** (📡) icon corresponding to a bill segment, the **SQ Details**, **Bill Segment Calculation Lines**, and **Transaction Details** zones appear.

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Note:

The **SQ Details** zone appears when the bill segment is generated for an SQI based billable charge.

The **Transaction Details** zone appears only when the bill segment is generated for a billable charge which is created through the transaction aggregation process.

You can filter the list using various search criteria (such as, **Start Date** and **End Date**) available in the **Filter** area. By default, the **Filter** area is hidden. You can view the **Filter** area by clicking the **Filters** (▽) icon in the upper right corner of this zone.

Related Topics

For more information on...	See...
How to view the SQ details of a bill segment	Viewing the SQ Details of a Bill Segment on page 686
How to view the calculation lines of a bill segment	Viewing the Calculation Lines of a Bill Segment on page 687
How to view the transactions whose charges billed through a bill segment	Viewing the Transactions Whose Charges are Billed Through a Bill Segment on page 687

SQ Details

The **SQ Details** zone lists the service quantity identifiers (SQIs) used in the bill segment calculation. It appears when the bill segment is generated for an SQI based billable charge. It contains the following columns:

Column Name	Column Description
SQI	Indicates the service quantity identifier.
Billed Service Quantity	Displays the service quantity used by the rates engine for calculation. This amount differs from the initial service quantity when the rate's SQ rules manipulate the service quantity.

By default, the **SQ Details** zone does not appear in the **Bill Information** screen. It appears when you click the **Broadcast** (📡) icon corresponding to a bill segment in the **Bill Segment Details** zone.

Bill Segment Calculation Lines

The **Bill Segment Calculation Lines** zone lists the calculation lines of the bill segment. It contains the following columns:

Column Name	Column Description
Header Sequence	Indicates the sequence in which the calculation line is generated.
Sequence	Ideally, the sequence would be 1 unless multiple versions of the rate were effective during the bill period. If there is more than one effective rate version, there will be a separate set of calculation lines for each version applied. The lines that apply to the first part of the bill period would have a Sequence of 1, the lines for the next part of the bill period would have a Sequence of 2 and so on.
Description on Bill	Displays the summarized information about the charge that will be printed on the bill.
Calculated Amount	Displays the calculated charge amount.

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Column Name	Column Description
Distribution Code	Displays the distribution code which indicates the GL account to which the charge must be posted.
Aggregated Quantity	Displays the total amount which is utilized during a billing cycle.
Billed Quantity	Displays the actual amount based on which the billable charge is created.
Rate	Displays the rate which is used for the calculation.
Pricing Amount	Displays the calculated charge amount. This amount appears in the pricing currency.
Pricing Currency	Indicates the currency in which the price item pricing is defined.
Exchange Rate	Indicates the exchange rate which is used when the invoice currency is different from the pricing currency.
Service Quantity	Indicates the service quantity which is used for calculation.

Note: Pagination is used to display limited number of records in this zone. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

By default, the **Bill Segment Calculation Lines** zone does not appear in the **Bill Information** screen. It appears when you click the **Broadcast** (📡) icon corresponding to a bill segment in the **Bill Segment Details** zone.

Transaction Details

The **Transaction Details** zone lists the transactions whose charges are billed through the bill segment. It contains the following columns:

Column Name	Column Description
Transaction ID	Displays the transaction ID. **Note:** It has a link. On clicking the link, the **Transaction Details** screen appears where you can view the details of the respective transaction.
Transaction Date	Displays the date and time when the transaction was performed.
Transaction Volume	Displays the transaction volume.
Transaction Amount	Displays the transaction amount.
Transaction Currency	Displays the currency in which the transaction was performed.
Transaction Source	Displays the transaction source from where the transaction was received.
Transaction Record Type	Displays the record type of the transaction.
Initial Price Item	Indicates the price item to which the transaction is mapped.
Rule	Indicates the rule which was met while determining initial price item for the transaction. **Note:** It has a link. On clicking the link, the **Rule** screen appears where you can view the details of the respective rule.
Transaction Information	Displays information about the transaction.

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Column Name	Column Description
	Note: It has a link. On clicking the link, the **Transaction Details** screen appears where you can view the details of the respective transaction.

By default, the **Transaction Details** zone does not appear in the **Bill Information** screen. It appears when you click the **Broadcast** (📡) icon corresponding to a bill segment in the **Bill Segment Details** zone.

On clicking the **Broadcast** (📡) icon corresponding to a transaction, the **Transaction Leg Calculation Lines** zone appears with the details of the respective transaction.

Related Topics

For more information on...	See...
How to view the calculation lines of all legs of a transaction	Viewing the Calculation Lines of All Legs of a Transaction on page 688

Transaction Leg Calculation Lines

The **Transaction Leg Calculation Lines** zone lists the calculation lines of all legs of the transaction which are rated before billing. It contains the following columns:

Column Name	Column Description
Transaction Calculation ID	Displays the transaction calculation ID.
Sequence	Indicates the sequence in which the calculation line was created. It is the sequence of the rate component which is used in the rate schedule.
Price Component ID	Indicates the price component which is used during calculation.
Rating Information	Indicates the rate which is used for the calculation.
SQI	Indicates the service quantity identifier (SQI) which is used in the calculation.
Billable Service Quantity	Indicates the service quantities used by the rates engine for calculation.
Calculated Amount	Displays the calculated charge amount which is rounded off (i.e. amount in precision). For example, 100. This amount appears in the invoice currency.
Precise Calculated Amount	Displays the calculated charge amount which is not rounded off (i.e. amount with precision and scale). For example, 98.67. This amount appears in the invoice currency.
Exempt Amount	Displays the amount of the calculated charge that the person does not have to pay due to tax exemption.
Base Amount	Displays the total amount derived from the cross-referenced line(s) that the current line then used to calculate the charge amount.
Pricing Amount	Displays the calculated charge amount which is not rounded off (i.e. amount with precision and scale). For example, 98.67. This amount appears in the pricing currency.
Exchange Rate	Indicates the exchange rate which is used when the invoice currency is different from the pricing currency.
Print	Indicates whether information about the calculation line must be printed on the person's bill. The valid values are:

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Column Name	Column Description
	• Y • N
Description on Bill	Displays the summarized information about the charge that will be printed on the bill.
Distribution Code	Displays the distribution code which indicates the GL account to which the charge must be posted.
Pricing Currency	Indicates the currency in which the price item pricing is defined.
Aggregation Parameter Group ID	Indicates the aggregation parameter group using which the transaction legs are aggregated during calculation.

Note: Pagination is used to display limited number of records in this zone. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

By default, the **Transaction Leg Calculation Lines** zone does not appear in the **Bill Information** screen. It appears when you click the **Broadcast** (📡) icon corresponding to a transaction in the **Transaction Details** zone.

Hold Details

The **Hold Details** zone lists the hold requests through which the bill is kept on hold or through which the bill generation process of the respective person or account is kept on hold. Note that only those hold requests are listed in this zone where the respective entities' start date is earlier than or equal to the system date and the entities' end date is later than or equal to the system date. It contains the following columns:

Column Name	Column Description
Hold Request Information	Displays information about the hold request. **Note:** It has a link. On clicking the link, the **Hold Request** screen appears where you can view the details of the respective hold request.
Status	Indicates the status of the hold request. The valid values are: • Draft • Active
Entity	Indicates the type of entity for which the hold request is created. The valid value is: • Account • Bill • Person
Entity Information	Indicates the entity for which the hold request is created. In addition, a context menu (⊙) icon appears corresponding to this field which helps in navigating to other screens in the application. **Note:** It has a link. On clicking the link, the **Account**, **Bill**, or **Person** screen appears, respectively, where you can view the details of the respective entity.
Start Date	Displays the date from when the hold request is effective.
End Date	Displays the date till when the hold request is effective.

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Offset Details

The **Offset Details** zone lists the offset requests through which the bill is offset against another bill. It contains the following columns:

Column Name	Column Description
Offset Request Information	Displays information about the offset request. **Note:** It has a link. On clicking the link, the **Offset Request** screen appears where you can view the details of the respective offset request.
Offset Amount	Indicates the bill amount which is offset against another bill.
Creation Mode	Indicates the mode in which the offset request is created. The valid values are: • Automatic • Manual

Note: Pagination is used to display limited number of records in this zone. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

Refund and Write Off Details

The **Refund and Write Off Details** zone lists the refund and write off requests through which the bill or its bill segment is either refunded or written off. It contains the following columns:

Column Name	Column Description
Create Date/Time	Displays the date and time when the refund or write off request is created.
Refund/Write Off Request Information	Displays information about the refund or write off request. **Note:** It has a link. On clicking the link, the **Refund Request** or **Write Off Request** screen appears depending on whether the request is created for refund or write off.
Refund/Write Off Amount	Displays the total refund or write off amount.
Status	Indicates the status of the refund or write off request. The valid values are: • Approval In Progress • Cancelled • Deferred Processing • Draft • Processed • Rejected • Voided
Action	Indicates whether the request is created for refund or write off. The valid values are: • Refund • Write Off

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Column Name	Column Description
Account Information	Indicates the account for which the refund or write off request is created. In addition, this column has a context menu which helps in navigating to other screens in the application.
	Note: It has a link. On clicking the link, the **Account** screen appears where you can view the details of the respective account.
Created By	Indicates the user who has created the refund or write off request.

Note: Pagination is used to display limited number of records in this zone. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

You can filter the list using the **Action** field available in the **Filter** area. By default, the **Filter** area is hidden. You can view the **Filter** area by clicking the **Filters** (▽) icon in the upper right corner of this zone.

Viewing the SQ Details of a Bill Segment

Procedure

To view the SQ details of a bill segment:

1. Search for the account, whose bill details you want to view, in the **Customer 360° View** screen.
2. In the **Search Results** section, click the **View** (🔗) icon corresponding to the account whose details you want *t*o view.
   The **Account** tab appears in the **Customer 360° Information** screen.
3. In the **Open Bills** zone, click the **View** (🔗) icon corresponding to the bill whose details you want to view.
   The **Bill Information** screen appears.
4. In the **Bill Segment Details** zone, click the **Broadcast** (📡) icon corresponding *t*o the bill segment whose details you want to view.
   The **SQ Details**, **Bill Segment Calculation Lines**, and **Transaction Details** zones appear.

   Note:

   The **SQ Details** zone appears when the bill segment is generated for an SQI based billable charge.

   The **Transaction Details** zone appears when the bill segment is generated for a billable charge which is created through the transaction aggregation process.
5. View the SQ details of the bill segment in the **SQ Details** zone.

Related Topics

For more information on...	See...
How to search for an account	Searching for an Account on page 598
Customer 360° Information screen	Customer 360° Information on page 607
Account tab	Customer 360° Information - Account on page 620
Open Bills zone	Open Bills on page 627
Bill Information screen	Bill Information on page 677
Bill Segment Details zone	Bill Segment Details on page 679
SQ Details zone	SQ Details on page 681

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Viewing the Calculation Lines of a Bill Segment

Procedure

To view the calculation lines of a bill segment:

1. Search for the account, whose bill details you want to view, in the **Customer 360° View** screen.
2. In the **Search Results** section, click the **View** (🔗) icon corresponding to the account whose details you want *t*o view.
   The **Account** tab appears in the **Customer 360° Information** screen.
3. In the **Open Bills** zone, click the **View** (🔗) icon corresponding to the bill whose details you want to view.
   The **Bill Information** screen appears.
4. In the **Bill Segment Details** zone, click the **Broadcast** (📡) icon corresponding *t*o the bill segment whose details you want to view.
   The **SQ Details**, **Bill Segment Calculation Lines**, and **Transaction Details** zones appear.

   Note:

   The **SQ Details** zone appears when the bill segment is generated for an SQI based billable charge.

   The **Transaction Details** zone appears when the bill segment is generated for a billable charge which is created through the transaction aggregation process.

5. View the calculation lines of the bill segment in the **Bill Segment Calculation Lines** zone.

Related Topics

For more information on...	**See...**
How to search for an account	Searching for an Account on page 598
Customer 360° Information screen	Customer 360° Information on page 607
Account tab	Customer 360° Information - Account on page 620
Open Bills zone	Open Bills on page 627
Bill Information screen	Bill Information on page 677
Bill Segment Details zone	Bill Segment Details on page 679
Bill Segment Calculation Lines zone	Bill Segment Calculation Lines on page 681

Viewing the Transactions Whose Charges are Billed Through a Bill Segment

Procedure

To view the transactions whose charges are billed through a bill segment:

1. Search for the account, whose bill details you want to view, in the **Customer 360° View** screen.
2. In the **Search Results** section, click the **View** (🔗) icon corresponding to the account whose details you want *t*o view.
   The **Account** tab appears in the **Customer 360° Information** screen.
3. In the **Open Bills** zone, click the **View** (🔗) icon corresponding to the bill whose details you want to view.
   The **Bill Information** screen appears.
4. In the **Bill Segment Details** zone, click the **Broadcast** (📡) icon corresponding *t*o the bill segment whose details you want to view.

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The **SQ Details**, **Bill Segment Calculation Lines**, and **Transaction Details** zones appear.

> **Note:**
>
> The **SQ Details** zone appears when the bill segment is generated for an SQI based billable charge.
>
> The **Transaction Details** zone appears when the bill segment is generated for a billable charge which is created through the transaction aggregation process.

5. View the transactions whose charges are billed through the bill segment in the **Transaction Details** zone.

Related Topics

For more information on...	See...
How to search for an account	Searching for an Account on page 598
Customer 360° Information screen	Customer 360° Information on page 607
Account tab	Customer 360° Information - Account on page 620
Open Bills zone	Open Bills on page 627
Bill Information screen	Bill Information on page 677
Bill Segment Details zone	Bill Segment Details on page 679
Transaction Details zone	Transaction Details on page 682

Viewing the Calculation Lines of All Legs of a Transaction

Procedure

To view the calculation lines of all legs of a transaction:

1. Search for the account, whose bill details you want to view, in the **Customer 360° View** screen.
2. In the **Search Results** section, click the **View** (🔗) icon corresponding to the account whose details you want *t*o view.
   The **Account** tab appears in the **Customer 360° Information** screen.
3. In the **Open Bills** zone, click the **View** (🔗) icon corresponding to the bill whose details you want to view.
   The **Bill Information** screen appears.
4. In the**Bill Segment Details** zone, click the **Broadcast** (📡) icon corresponding *t*o the bill segment whose details you want to view.
   The **SQ Details**, **Bill Segment Calculation Lines**, and **Transaction Details** zones appear.

> **Note:**
>
> The **SQ Details** zone appears when the bill segment is generated for an SQI based billable charge.
>
> The **Transaction Details** zone appears when the bill segment is generated for a billable charge which is created through the transaction aggregation process.

5. In the **Transaction Details** zone, click the **Broadcast** (📡) icon corresponding *t*o the transaction whose calculation lines you want to view.
   The **Transaction Leg Calculation Lines** zone appears.
6. View the calculation lines of all legs which are rated before billing in the **Transaction Leg Calculation Lines** zone.

Related Topics

For more information on...	See...
How to search for an account	Searching for an Account on page 598

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For more information on...	See...
Customer 360° Information screen	Customer 360° Information on page 607
Account tab	Customer 360° Information - Account on page 620
Open Bills zone	Open Bills on page 627
Bill Information screen	Bill Information on page 677
Bill Segment Details zone	Bill Segment Details on page 679
Transaction Details zone	Transaction Details on page 682
Transaction Leg Calculation Lines zone	Transaction Leg Calculation Lines on page 683

Pricing Rule (Used for Viewing)

The **Pricing Rule** screen allows you to:

- View the details of a claim pricing rule of a parent customer
- View the details of a claim pricing rule of a bill group
- View the details of an aggregate stop-loss pricing rule of a parent customer
- View the details of an aggregate stop-loss pricing rule of a bill group
- View the details of a specific stop-loss pricing rule of a parent customer
- View the details of a specific stop-loss pricing rule of a bill group
- View the details of a retention type claim based pricing rule of a parent customer
- View the details of a retention type claim based pricing rule of a bill group
- View the details of a retention type enrollment based pricing rule of a parent customer
- View the details of a retention type enrollment based pricing rule of a bill group
- View the details of a one-time flat fee pricing rule of a bill group
- View the details of a bill period based recurring flat fee pricing rule of a bill group
- View the details of a frequency based recurring flat fee pricing rule of a bill group
- View the details of an ancillary pricing rule of a parent customer
- View the details of an ancillary pricing rule of a bill group
- View the details of a discount arrangement pricing rule of a parent customer
- View the details of a level funded pricing rule of a parent customer
- View the details of a level funded pricing rule of a bill group
- View the details of an age based pricing rule of a parent customer
- View the details of an age based pricing rule of a bill group
- View the details of a tier based pricing rule of a parent customer
- View the details of a tier based pricing rule of a bill group
- View the details of an additional fee pricing rule of a parent customer
- View the details of an additional fee pricing rule of a bill group
- View the details of a discount charge pricing rule of a parent customer
- View the details of a discount charge pricing rule of a bill group

This screen consists of the following zones:

- Claim on page 690
- Aggregate Stop-Loss on page 693
- Specific Stop-Loss on page 698
- Retention Type Claim Based on page 703

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- Retention Type Enrollment Based on page 705
- Flat Fee on page 706
- Ancillary on page 708
- Discount Arrangement on page 710
- Level Funded on page 712
- Age Based Pricing Rule on page 717
- Tier Based Pricing Rule on page 719
- Additional Fee Pricing Rule on page 720
- Discount Charge Pricing Rule on page 722

Claim

The **Claim** zone displays the details of the claim pricing rule for respective parent customer, bill group or a bill group using a pricing group. It contains the following sections:

- **Main** - Displays basic details of the claim pricing rule. It contains the following fields:

Field Name	Field Description
Parent Customer Information	Displays the parent customer information. In addition, a context menu appears corresponding to this field which helps in navigating to other screens in the application.
	Note: It has a link. On clicking the link, the **Person**, **Account** or **Policy** screen appears where you can view the details of the parent customer. This field appears only when the claim pricing rule is viewed for parent customer.
Bill Group Information	Displays the bill group information. In addition, a context menu appears corresponding to this field which helps in navigating to other screens in the application.
	Note: It has a link. On clicking the link, the **Person**, **Account** or **Policy** screen appears where you can view the details of the bill group. This field appears when the claim pricing rule is viewed for bill group.
Policy Information	Displays the policy information.
	Note: It has a link. On clicking the link, the **Policy** screen appears where you can view the details of the policy.
Pricing Rule Type	Indicates the pricing rule type.
Price Item Information	Indicates the price item information.
	Note: It has a link. On clicking the link, the **Price Item** screen appears where you can view the details of the price item.
Pricing Start Date	Displays the claim pricing rule start date.
Pricing End Date	Displays the claim pricing rule end date.

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Field Name	Field Description
Rate Option	Indicates the rate option of the claim pricing rule for the price item.
Claim Template	Indicates the claim template of the claim pricing rule.
Pricing Group	Displays the pricing group of the claim pricing rule. **Note:** This field appears when the claim pricing rule is viewed for pricing group.

- **Claim Handling Fees** - Lists the claim handling fees for line items in a claim pricing rule. It contains the following columns:

Column Name	Column Description
Fee Type	Indicates the type of charge applicable on the line items.
Fee	Indicates the fee for the line items.
Fee Significance	Indicates the purpose of the imposing the additional fees on the line items.
Fee Applicability	Displays the fee applicability on which the claim handling fees are defined. **Column Name** / **Column Description** Line Item: Indicates the line item that you want to use while defining additional fees for the claim pricing rule.
Rating Information	Displays the rating information that you want to use while defining the rate for the line items. **Column Name** / **Column Description** Rate Type: Indicates the rate type that you want to use while defining the additional fees for the line items. Rate: Used to specify the rate that you want to use while defining the additional fees for the line items. **Note:** This field is editable when the **Editable** checkbox is selected in the **Rate** column of the **Additional Fees** section while defining or editing the **C1-ExtLookClaimTemplate** extendable lookup.

- **Markup or Markdown Values** - Lists the markup or markdown values for line items in a claim pricing rule. It contains the following columns:

Column Name	Column Description
Pricing Strategy	Indicates the pricing strategy. The valid values are: • Markdown • Markup • None
Markup or Markdown Type	Indicates the markup or markdown value type for claim pricing rule. The valid values are: • Flat Amount • Percentage

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Column Name	Column Description
Markup or Markdown Amount	Displays the markup or markdown amount.
Rate Type	Displays minimum and maximum markup or markdown defined using the rate type.
Rate	Displays the value for minimum and maximum markup or markdown defined using the rate type.

- **Line Items** - This section contains the following fields:

Field Name	Field Description
Sequence	Displays the sequence number for the line items.
Line Item	Displays the billing line items.
Billing Eligibility	Displays whether the line item is user defined, eligible or not eligible for billing. The valid values are: • Eligible • Not Eligible • User Defined (Default Yes) • User Defined (Default No)
User Defined Billing Option	Displays whether the billing option is user defined, eligible or not eligible.
Markup or Markdown Percentage Eligibility	Displays whether the line item is eligible or not eligible for markup or markdown percentage. The valid values are: • Eligible • Not Eligible
Markup or Markdown Percentage	Displays the percentage for markup or markdown value.
Rating Information	Displays the rating information that you want to use while defining the rate for the line items.

Column Name	Column Description
Rate Type	Indicates the rate type that you want to use while defining the rate for the line items.
Rate	Used to specify the rate that you want to use while defining the rate for the line items.
	Note: This field is editable when the **Editable** checkbox is selected in the **Rate** column of the **Additional Fees** section while defining or editing the **C1-ExtLookClaimTemplate** extendable lookup.

- **Characteristics** - Lists the characteristics defined for the claim pricing rule. It contains the following columns:

Column Name	Column Description
Effective Date	Displays the date from when the characteristic is effective for the claim pricing rule.

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Column Name	Column Description
Characteristic Type	Indicates the characteristic type.
Characteristic Value	Displays the value of the characteristic type.

Related Topics

For more information on...	See...
How to view a claim pricing rule of a parent customer	Viewing a Claim Pricing Rule of a Parent Customer on page 2995
How to view a claim pricing rule of a bill group	Viewing a Claim Pricing Rule of a Bill Group on page 3004

Aggregate Stop-Loss

The **Aggregate Stop-Loss** zone displays the details of the aggregate stop-loss pricing rule for respective parent customer, bill group or a bill group using a pricing group. It contains the following sections:

- **Main** - Displays basic details of the aggregate stop-loss pricing rule. It contains the following fields:

Field Name	Field Description
Parent Customer Information	Displays the parent customer information. In addition, a context menu appears corresponding to this field which helps in navigating to other screens in the application.
	Note: It has a link. On clicking the link, the **Person**, **Account** or **Policy** screen appears where you can view the details of the parent customer. This field appears only when the aggregate stop-loss pricing rule is viewed for parent customer.
Bill Group Information	Displays the bill group information. In addition, a context menu appears corresponding to this field which helps in navigating to other screens in the application.
	Note: It has a link. On clicking the link, the **Person**, **Account** or **Policy** screen appears where you can view the details of the bill group. This field appears when the aggregate stop-loss pricing rule is viewed for bill group.
Policy Information	Displays the policy information.
	Note: It has a link. On clicking the link, the **Policy** screen appears where you can view the details of the policy. This field appears when the aggregate stop-loss pricing rule is viewed for bill group.

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Field Name	Field Description
Pricing Rule Type	Indicates the pricing rule type.
Price Item Information	Indicates the price item information. **Note:** It has a link. On clicking the link, the **Price Item** screen appears where you can view the details of the price item.
Parent Customer's SSL or ASL Pricing Rules	Displays the pricing date range derived from the parent customer's specific stop-loss or aggregate stop-loss pricing rule.
Pricing Start Date	Displays the pricing rule start date.
Pricing End Date	Displays the pricing rule end date.
Rate Option	Indicates the rate option of the aggregate stop-loss pricing rule for the price item.
Settlement Frequency	Indicates the settlement frequency that helps to determine the bill after date. The valid values are: • Immediately • Manually (At Required Intervals) • Monthly • Yearly **Note:** This field appears when the aggregate stop-loss pricing rule is viewed for parent customer.
Underwriter Review	Indicates whether the underwriter settlement review flag is on or off. The valid values are: • Yes • No **Note:** This field appears when the aggregate stop-loss pricing rule is viewed for parent customer.
Pricing Group	Displays the pricing group of the aggregate stop-loss pricing rule. **Note:** This field appears when the aggregate stop-loss pricing rule is viewed for pricing group.

- **Accumulation Parameters** - Lists the accumulation parameters in an aggregate stop-loss pricing rule. It contains the following fields:

Field Name	Field Description
Accumulation Group ID	Displays the accumulation group ID generated when accumulation parameters are defined for a specific stop-loss..
ASL Credit Account	Indicates the account in which the aggregate stop-loss amount is credited.

This section also lists the following columns:

Column Name	Column Description
Incurred Start Date	Displays the incurred start date based on the accumulated specific stop-loss.
Incurred End Date	Displays the incurred end date based on the accumulated specific stop-loss.

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Column Name	Column Description
ASL Payout Limit	Displays the maximum limit for the specific stop-loss at member or main subscriber level.
Paid Start Date	Displays the paid start date based on the accumulated specific stop-loss.
Paid End Date	Displays the paid end date based on the accumulated specific stop-loss.
Settlement Days	Indicates the settlement days used in calculating the settlement date.
ASL Limit (During Policy Period)	Indicates the aggregate stop-loss limit that was set during the policy period. The valid values are: • Policy Based Limit • Enrollment Based Limit • Percentage of Enrollment Based Limit • Enrollment Based or Minimum ASL Limit (Whichever is Greater)
ASL Limit (During Settlement Period)	Indicates the aggregate stop-loss limit that was set during the settlement period. The valid values are: • Policy Based Limit • Enrollment Based Limit • Enrollment Based or Minimum ASL Limit (Whichever is Greater)
Minimum ASL Limit	Displays the minimum ASL limit. **Note:** This field displays value when the **Enrollment Based or Minimum ASL Limit (Whichever is Greater)** option appears for the **ASL Limit (During Policy Period)** or **ASL Limit (During Settlement Period)** field.
Percentage of Enrollment Based Limit	Displays the percentage of enrollment based limit. **Note:** This field displays value when the **Percentage of Enrollment Based Limit** option appears for the**ASL Limit (During Policy Period)** field.
Policy Based Limit	Displays the policy based limit. **Note:** This field displays value when the **Policy Based Limit** option appears for the **ASL Limit (During Policy Period)** or **ASL Limit (During Settlement Period)** field.

Note: This section appears when the aggregate stop loss is created for parent customer.

- **Accumulation Criteria** - This section contains the following columns:

Column Name	Column Description
Accumulation Group ID	Displays the accumulation group ID generated when the accumulation criteria values were defined for a aggregate stop-loss.
Price Item Information	Displays the price item information. **Note:** It has a link. On clicking the link, the **Price Item** screen appears where you can view the details of the price item.
Price Item Parameters	This field contains the following columns:

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Column Name	Column Description	
	Column Name	**Column Description**
	Price Item Parameter	Displays the multiple parameters based on which you have determined the price item utilization.
		Note: It has a link. On clicking the link, the **Parameter** screen appears where you can view the details of the parameter.
	Parameter Value	Displays the value of the parameter.

Note:

This section appears when the aggregate stop-loss is created for a bill group.

Accumulation criteria for each rule appears when the aggregate stop-loss is created for a bill group using a pricing group.

- **Pricing Information** - This section contains the following sub-section:
  - **Claim Pricing Rule** - This sub-section contains the following field:

Field Name	Field Description
Effective Claim Pricing Rule	Indicates the claim pricing rule effective for pricing.

This sub-section contains the following sections:

- **Domestic Provider Claims** - Displays the domestic provider claim while calculating aggregate stop-loss. This section contains the following field:

Field Name	Field Description
Exclude ASL (Percentage)	Displays the domestic provider claim billable charge line excluding the aggregate stop-loss in percentage created for domestic provider claim calculation lines.

- **Markup or Markdown Values** - Displays the markup or markdown values for billable charge line. This section contains the following fields:

Field Name	Field Description
Pricing Strategy	Indicates the pricing strategy. The valid values are: • Markdown • Markup • None
Markup or Markdown Type	Indicates the markup or markdown value type for claim line items. The valid values are: • Flat Amount • Percentage
Markup or Markdown Amount	Displays the markup or markdown amount.

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Field Name	Field Description
	Note: This field displays amount when **Markup or Markdown Type** field is **Flat Amount**.

- **Line Items** - Displays the associated line items eligible for billing. This section contains the following fields:

Field Name	Field Description
Sequence	Displays the sequence number for the line items.
Line Item	Displays the billing line items.
Eligible for Aggregate Stop-Loss	Displays whether the line item is eligible or not eligible for aggregate stop-loss.
Markup or Markdown Percentage Eligibility	Displays whether the line item is eligible or not eligible for markup or markdown percentage. The valid values are: • Eligible • Not Eligible
Markup or Markdown Percentage	Displays the percentage for markup or markdown value.

Note:

This section appears when the aggregate stop-loss is created for a bill group.

Claim line items for each rule appears when the aggregate stop-loss is created for a bill group using a pricing group.

- **Run-In Parameters** - This section contains the following columns:

Column Name	Column Description
Run-In	Displays whether the run-in parameters of the run-in period of policy are to be considered or not in an aggregate stop-loss pricing
Accumulation Group ID	Displays the accumulation group ID that is generated when the accumulation parameter values were defined for an aggregate stop-loss.
Incurred Start Date	Displays the incurred start date based on the run-in period of the policy in the aggregate stop-loss. **Note:** This field displays value when the checkbox for the **Run-In** field is selected.
Incurred End Date	Displays the incurred end date based on the run-in period of the policy in the aggregate stop-loss. **Note:** This field displays value when the checkbox for the **Run-In** field is selected.
Paid Start Date	Displays the paid start date based on the run-in period of the policy in the aggregate stop-loss. **Note:** This field displays value when the checkbox for the **Run-In** field is selected.
Paid End Date	Displays the paid end date based on the run-in period of the policy in the aggregate stop-loss. **Note:** This field displays value when the checkbox for the **Run-In** field is selected.

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Column Name	Column Description
Run-In Maximum Limit	Displays the maximum limit of the run-in parameters. **Note:** This field displays value when the checkbox for the **Run-In** field is selected.

Note: This section appears when the specific stop loss is created for parent customer.

- **Characteristics** - Lists the characteristics defined for the aggregate stop-loss pricing rule. It contains the following columns:

Column Name	Column Description
Effective Date	Displays the date from when the characteristic is effective for the aggregate stop-loss pricing rule.
Characteristic Type	Indicates the characteristic type.
Characteristic Value	Displays the value of the characteristic type.

Related Topics

For more information on...	See...
How to view an aggregate stop-loss pricing rule of a parent customer	Viewing an Aggregate Stop-Loss Pricing Rule of a Parent Customer on page 3060
How to view an aggregate stop-loss pricing rule of a bill group	Viewing an Aggregate Stop-Loss Pricing Rule of a Bill Group on page 3071

Specific Stop-Loss

The **Specific Stop-Loss** zone displays the details of the specific stop-loss pricing rule for respective parent customer, bill group or a bill group using a pricing group. It contains the following sections:

- **Main** - Displays basic details of the specific stop-loss pricing rule. It contains the following fields:

Field Name	Field Description
Parent Customer Information	Displays the parent customer information. In addition, a context menu appears corresponding to this field which helps in navigating to other screens in the application. **Note:** It has a link. On clicking the link, the **Person**, **Account** or **Policy** screen appears where you can view the details of the parent customer. This field appears only when the specific stop-loss pricing rule is viewed for parent customer.
Bill Group Information	Displays the bill group information. In addition, a context menu appears corresponding to this field which helps in navigating to other screens in the application.

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Field Name	Field Description
	Note: It has a link. On clicking the link, the **Person**, **Account** or **Policy** screen appears where you can view the details of the bill group. This field appears when the specific stop-loss pricing rule is viewed for bill group.
Policy Information	Displays the policy information.
	Note: It has a link. On clicking the link, the **Policy** screen appears where you can view the details of the policy. This field appears when the specific stop-loss pricing rule is viewed for parent customer.
Pricing Rule Type	Indicates the pricing rule type.
Price Item Information	Indicates the price item information.
	Note: It has a link. On clicking the link, the **Price Item** screen appears where you can view the details of the price item.
Parent Customer's SSL Pricing Rule	Displays the pricing date range derived from the parent customer's specific stop-loss pricing rule.
	Note: This field appears when the specific stop-loss pricing rule is viewed for bill group.
Pricing Start Date	Displays the specific stop-loss pricing rule start date.
Pricing End Date	Displays the specific stop-loss pricing rule end date.
Rate Option	Indicates the rate option of the specific stop-loss pricing rule for the price item.
Pricing Rule Usage	Indicates whether the pricing rule is used only for pricing or for pricing and billing. The valid values are: • Pricing • Pricing and Billing
	Note: This field appears when the specific stop-loss pricing rule is viewed for parent customer.
Accumulation Level	Indicate whether the specific stop-loss is accumulated at the member or main subscriber level. The valid values are: • Member • Main Subscriber
	Note: This field appears when the specific stop-loss pricing rule is viewed for parent customer.
Settlement Frequency	Indicates the settlement frequency that helps to determine the bill after date. The valid values are:

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Field Name	Field Description
	• Immediately • Manually (At Required Intervals) • Never • Yearly
	Note: This field appears when the specific stop-loss pricing rule is viewed for parent customer.
Underwriter Review	Indicates whether the underwriter settlement review flag is on or off. The valid values are: • Yes • No
	Note: This field appears when the specific stop-loss pricing rule is viewed for parent customer.
Pricing Group	Displays the pricing group of the specific stop-loss pricing rule.
	Note: This field appears when the specific stop-loss pricing rule is viewed for pricing group.

- **Accumulation Parameters** - Lists the accumulation parameters in a specific stop-loss pricing rule. It contains the following field:

Field Name	Field Description
Accumulation Group ID	Displays the accumulation group ID generated when accumulation parameters are defined for a specific stop-loss..

This section also lists the following columns:

Column Name	Column Description
Incurred Start Date	Displays the incurred start date based on the accumulated specific stop-loss.
Incurred End Date	Displays the incurred end date based on the accumulated specific stop-loss.
SSL Payout Limit	Displays the maximum limit for the specific stop-loss at member or main subscriber level.
Paid Start Date	Displays the paid start date based on the accumulated specific stop-loss.
Paid End Date	Displays the paid end date based on the accumulated specific stop-loss.
Settlement Days	Indicates the settlement days used in calculating the settlement date.
Compute Aggregate SSL (ASL)	Indicates whether the aggregate specific stop-loss (ASSL) is calculated or not during the **C1-BCSSL** batch run for each bill group. The valid values are: • Yes • No
ASSL Credit Account	Indicates that the aggregate specific stop-loss amount beyond the ASSL limit paid by the insurance company to the ASSL credit account.
ASSL Limit	

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Note: This section appears when the specific stop loss is created for parent customer.

- **Accumulation Criteria** - This section contains the following columns:

Column Name	Column Description
Accumulation Group ID	Displays the accumulation group ID generated when the accumulation criteria values were defined for a specific stop-loss.
Run-In Maximum Limit	Displays the maximum specific stop-loss limit defined for the member when the claim transactions were received in the run-in period of the policy.
SSL Limit	Displays whether the SSL limit indicating the specific stop-loss amount beyond this limit is paid by the insurance company.
Price Item Information	Displays the price item information. **Note:** It has a link. On clicking the link, the **Price Item** screen appears where you can view the details of the price item.
Price Item Parameters	This field contains the following columns: **Column Name** / **Column Description** Price Item Parameter: Displays the multiple parameters based on which you have determined the price item utilization. **Note:** It has a link. On clicking the link, the **Parameter** screen appears where you can view the details of the parameter. Parameter Value: Displays the value of the parameter.

Note:

This section appears when the specific stop-loss is created for a bill group.

Accumulation criteria for each rule appears when the specific stop-loss is created for a bill group using a pricing group.

- **Pricing Information** - This section contains the following sub-section:
  - **Claim Pricing Rule** - This sub-section contains the following field:

Field Name	Field Description
Effective Claim Pricing Rule	Indicates the claim pricing rule effective for pricing.

This sub-section contains the following sections:

- **Domestic Provider Claims** - Displays the domestic provider claim while calculating specific stop-loss. This section contains the following field:

Field Name	Field Description
Exclude SSL (Percentage)	Displays the domestic provider claim billable charge line excluding the specific stop-loss in percentage created for domestic provider claim calculation lines.

- **Markup or Markdown Values** - Displays the markup or markdown values for billable charge line. This section contains the following fields:

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Field Name	Field Description
Pricing Strategy	Indicates the pricing strategy. The valid values are: • Markdown • Markup • None
Markup or Markdown Type	Indicates the markup or markdown value type for claim line items. The valid values are: • Flat Amount • Percentage
Markup or Markdown Amount	Displays the markup or markdown amount. **Note:** This field displays amount when **Markup or Markdown Type** field is **Flat Amount**.

- **Line Items** - Displays the associated line items eligible for billing. This section contains the following fields:

Field Name	Field Description
Sequence	Displays the sequence number for the line items.
Line Item	Displays the billing line items.
Eligible for Specific Stop-Loss	Displays whether the line item is eligible or not eligible for specific stop-loss.
Markup or Markdown Percentage Eligibility	Displays whether the line item is eligible or not eligible for markup or markdown percentage. The valid values are: • Eligible • Not Eligible
Markup or Markdown Percentage	Displays the percentage for markup or markdown value.

Note:

This section appears when the specific stop-loss is created for a bill group.

Claim line items for each rule appears when the specific stop-loss is created for a bill group using a pricing group.

- **Run-In Parameters** - This section contains the following columns:

Column Name	Column Description
Run-In	Displays whether the run-in parameters of the run-in period of policy are to be considered or not in a specific stop-loss pricing
Incurred Start Date	Displays the incurred start date based on the run-in period of the policy in the specific stop-loss.
Incurred End Date	Displays the incurred end date based on the run-in period of the policy in the specific stop-loss.
Paid Start Date	Displays the paid start date based on the run-in period of the policy in the specific stop-loss.

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Column Name	Column Description
Paid End Date	Displays the paid end date based on the run-in period of the policy in the specific stop-loss.

Note: This section appears when the specific stop loss is created for parent customer.

- **Lasering and Exclusion** - Lists the lasering and exclusion information in a specific stop-loss pricing rule. It contains the following columns:

Column Name	Column Description
Accumulation Group ID	Displays the accumulation group ID generated when the accumulation parameter values were defined for the specific stop-loss.
Level Identifier	Displays the lasering or exclusion level identifier.
Lasering or Exclusion Level	Indicates the lasering or exclusion level of the specific stop-loss. The valid values are: • Main Subscriber • Member • Provider
Exception Type	Indicates the exception type. The valid values are: • Lasering • Exclusion
Comments	Displays the comments.
Lasered Amount	Displays the lasered amount.

Note: This section appears when the specific stop loss is created for parent customer.

- **Characteristics** - Lists the characteristics defined for the specific stop-loss pricing rule. It contains the following columns:

Column Name	Column Description
Effective Date	Displays the date from when the characteristic is effective for the specific stop-loss pricing rule.
Characteristic Type	Indicates the characteristic type.
Characteristic Value	Displays the value of the characteristic type.

Related Topics

For more information on...	See...
How to view a specific stop-loss pricing rule of a parent customer	Viewing a Specific Stop-Loss Pricing Rule of a Parent Customer on page 3026
How to view a specific stop-loss pricing rule of a bill group	Viewing a Specific Stop-Loss Pricing Rule of a Bill Group on page 3038

Retention Type Claim Based

The **Retention Type Claim Based** zone displays the details of the Retention Type Claim Based Pricing Rule. This zone contains the following sections:

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- **Main** - This section provides basic information about the retention type claim based pricing rule type. It contains the following fields:

Field Name	Field Description
Parent Customer Information	Displays the parent customer information. In addition, a context menu appears corresponding to this field which helps in navigating to other screens in the application.
	Note: It has a link. On clicking the link, the **Person** screen appears where you can view the details of the parent customer. This field appears when the retention type claim based pricing rule is viewed for parent customer.
Pricing Rule Type	Displays the pricing rule type.
Price Item Information	Displays the price item.
	Note: It has a link. On clicking the link, the **Price Item** screen appears where you can view the details of the price item.
Rate Option	Displays the rate option of the retention type claim based pricing rule.
Pricing Start Date	Displays the date from when the pricing is effective for retention type claim based pricing rule.
Pricing End Date	Displays the date till when the pricing is effective for retention type claim based pricing rule.

- **Parameters** - This section lists the parameters which are defined for retention type claim based pricing rule. It contains the following columns:

Column Name	Column Description
Price Item Parameters	Displays the parameter item information for retention type claim based pricing rule.

Column Name	Column Description
Price Item Parameters	Displays multiple parameters based on which you have determined the price item utilization.
Parameter Description	Displays the description of the parameter.
Parameter Value	Displays the value of the parameter.
Parameter Value Description	Displays the description of the value, defined as a parameter.

Fee	Displays the fee that is applicable for which price item parameters are defined.

- **Characteristics** - This section displays the pricing rule type characteristics. It contains the following columns:

Column Name	Column Description
Effective Date	Displays the date from when the characteristics are effective.
Characteristic Type	Displays the characteristic type.
Characteristic Value	Displays the value for the characteristic type.

Related Topics

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For more information on...	See...
Pricing Rule Type screen	Pricing Rule Type on page 2942
Pricing Rule Type zone	Pricing Rule Type on page 2946

Retention Type Enrollment Based

The **Retention Type Enrollment Based** zone displays the details of the Retention Type Enrollment Based Pricing Rule. This zone contains the following sections:

- **Main** - This section provides basic information about the retention type claim based pricing rule type. It contains the following fields:

Field Name	Field Description
Parent Customer Information	Displays the parent customer information. In addition, a context menu appears corresponding to this field which helps in navigating to other screens in the application.
	Note: It has a link. On clicking the link, the **Person** screen appears where you can view the details of the parent customer. This field appears when the retention type enrollment based pricing rule is viewed for parent customer.
Pricing Rule Type	Displays the pricing rule type.
Price Item Information	Displays the price item.
	Note: It has a link. On clicking the link, the **Price Item** screen appears where you can view the details of the price item.
Rate Option	Displays the rate option of the retention type enrollment based pricing rule.
Pricing Start Date	Displays the date from when the pricing is effective for retention type enrollment based pricing rule.
Pricing End Date	Displays the date till when the pricing is effective for retention type enrollment based pricing rule.
Exempt Retro Transactions	Indicates whether retro transactions should be a part of retention type enrollment based pricing rule.

- **Parameters** - This section lists the parameters which are defined for retention type enrollment based pricing rule. It contains the following columns:

Column Name	Column Description
Price Item Parameters	Displays the parameter item information for retention type enrollment based pricing rule.

Column Name	Column Description
Price Item Parameters	Displays multiple parameters based on which you have determined the price item utilization.
Parameter Description	Displays the description of the parameter.
Parameter Value	Displays the value of the parameter.

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Column Name	Column Description	
	Column Name	**Column Description**
	Parameter Value Description	Displays the description of the value, defined as a parameter.
Fee	Displays the fee that is applicable for which price item parameters are defined.	

- **Characteristics** - This section displays the pricing rule type characteristics. It contains the following columns:

Column Name	Column Description
Effective Date	Displays the date from when the characteristics are effective.
Characteristic Type	Displays the characteristic type.
Characteristic Value	Displays the value for the characteristic type.

Related Topics

For more information on...	See...
Pricing Rule Type screen	Pricing Rule Type on page 2942
Pricing Rule Type zone	Pricing Rule Type on page 2946

Flat Fee

The **Flat Fee** zone displays the details of the one-time, bill period, and frequency based recurring flat fee pricing rule for bill group. It contains the following sections:

- **Main** - Displays basic details of the one-time, bill period, and frequency based recurring flat fee pricing rule. It contains the following fields:

Field Name	Field Description
Bill Group Information	Displays the bill group information. In addition, a context menu appears corresponding to this field which helps in navigating to other screens in the application. **Note:** It has a link. On clicking the link, the **Person**, **Account** or **Policy** screen appears where you can view the details of the bill group.
Policy Information	Displays the policy information. **Note:** It has a link. On clicking the link, the **Policy** screen appears where you can view the details of the policy.
Price Item Information	Indicates the price item information. **Note:** It has a link. On clicking the link, the **Price Item** screen appears where you can view the details of the price item.
Charge Date	Displays the flat fee charge date. **Note:** This field appears only for the one-time flat fee pricing rule for bill group.

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Field Name	Field Description
Charge Start Date	Displays the flat fee charge start date. **Note:** This field appears only for both bill period and frequency based recurring flat fee pricing rule for bill group.
Charge End Date	Displays the flat fee charge end date. **Note:** This field appears only for both bill period and frequency based recurring flat fee pricing rule for bill group.
Bill To Account Override	Displays the account to which the bill is override. In addition, a context menu appears corresponding to this field which helps in navigating to other screens in the application. **Note:** It has a link. On clicking the link, the **Account** screen appears where you can view the details of the account.
Billable Charge Line Type	Displays the billable charge line type.
Fee	Displays the amount of flat fee. **Note:** This field appears when a value is displayed in the **Billable Charge Line Type** field.
Bill Period	Indicates the bill period for flat fee. **Note:** This field appears only for the bill period based recurring flat fee pricing rule for bill group.
Frequency	Indicates the frequency for flat fee. **Note:** This field appears only for the frequency based recurring flat fee pricing rule for bill group.
Billable Charge Information	Displays the billable charge information. **Note:** It has a link. On clicking the link, the **Bill Charge ID** screen appears where you can view the details of the billable charge.

- **Characteristics** - Lists the characteristics defined for the one-time, bill period, and frequency based recurring flat fee pricing rule. It contains the following columns:

Column Name	Column Description
Effective Date	Displays the date from when the characteristic is effective for the one-time, bill period, and frequency based recurring flat fee pricing rule.
Characteristic Type	Indicates the characteristic type.
Characteristic Value	Displays the value of the characteristic type.

Related Topics

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For more information on...	See...
How to view a one-time flat fee pricing rule of a bill group	Viewing a One-Time Flat Fee Pricing Rule of a Bill Group on page 3139
How to view a bill period based recurring flat fee pricing rule of a bill group	Viewing a Bill Period Based Recurring Flat Fee Pricing Rule of a Bill Group on page 3153
How to view a frequency based recurring flat fee pricing rule of a bill group	Viewing a Frequency Based Recurring Flat Fee Pricing Rule of a Bill Group on page 3167

Ancillary

The **Ancillary** zone displays the details of the ancillary pricing rule for the respective parent customer, bill group, or a bill group using a pricing group. It contains the following sections:

- **Main** - Displays basic details of the ancillary pricing rule. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Parent Customer Information	Displays the parent customer information. In addition, a context menu appears corresponding to this field which helps in navigating to other screens in the application. **Note:** It has a link. On clicking the link, the **Person**, **Account** or **Policy** screen appears where you can view the details of the parent customer.	Not applicable
Bill Group Information	Displays the bill group information. In addition, a context menu appears corresponding to this field which helps in navigating to other screens in the application. **Note:** It has a link. On clicking the link, the **Person**, **Account** or **Policy** screen appears where you can view the details of the bill group.	Not applicable
Policy Information	Displays the policy information. **Note:** It has a link. On clicking the link, the **Policy** screen appears where you can view the details of the policy.	Not applicable
Pricing Rule Type	Indicates the type of the pricing rule.	Not applicable
Status	Indicates the status of the pricing rule.	Not applicable
Price Item Information	Indicates the price item information. **Note:** It has a link. On clicking the link, the **Price Item** screen appears where you can view the details of the price item.	Not applicable

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Field Name	Field Description	Mandatory (Yes or No)
Pricing Start Date	Displays the date from when the pricing rule is effective.	Not applicable
Pricing End Date	Displays the date till when the pricing rule is effective.	Not applicable
Rate Option	Indicates the rate option of the ancillary pricing rule for the price item.	Not applicable
Pass Through without Markup or Markdown	Indicates that markup or markdown should not be calculated for the ancillary charge.	Not applicable

- **Ancillary Charges** - Lists the accumulation parameters in an aggregate stop-loss pricing rule. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Billable Charge Line Type	Indicates the billable charge line type using which the ancillary pricing rule type is created. **Note:** It has a link. On clicking the link, the **Billable Charge Line Type** screen appears where you can view the details of the billable charge line type.	Not applicable
Billable	Indicates whether the ancillary billable charge is eligible for billing or not.	Not applicable
Rate Based	Indicates whether the ancillary charge is calculated using a particular rate or not.	Not applicable
Rate	Indicates the rate for calculating the ancillary charge.	Not applicable
Pricing Strategy	Indicates the price calculation strategy that is applied while defining the ancillary pricing rule.	Not applicable
Markup or Markdown Type	Indicates the type of charge that is applied while defining the ancillary pricing rule.	Not applicable
Amount / Percentage	Displays the actual proportion of the charge that is applied while defining the ancillary pricing rule.	Not applicable

- **Characteristics** - Lists the characteristics defined for the aggregate stop-loss pricing rule. It contains the following columns:

Column Name	Column Description
Effective Date	Displays the date from when the characteristic is effective for the ancillary pricing rule.
Characteristic Type	Indicates the characteristic type.
Characteristic Value	Displays the value of the characteristic type.

Related Topics

For more information on...	See...
How to view an ancillary pricing rule of a parent customer	Viewing an Ancillary Pricing Rule of a Parent Customer on page 3200

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For more information on...	See...
How to view an ancillary pricing rule of a bill group	Viewing an Ancillary Pricing Rule of a Bill Group on page 3208

Discount Arrangement

The **Discount Arrangement** zone displays the details of the discount arrangement pricing rule for the respective parent customer, bill group, or a bill group using a pricing group. It contains the following sections:

- **Main** - Displays basic details of the discount arrangement pricing rule. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Parent Customer Information	Displays the parent customer information. In addition, a context menu appears corresponding to this field which helps in navigating to other screens in the application. **Note:** It has a link. On clicking the link, the **Person**, **Account** or **Policy** screen appears where you can view the details of the parent customer.	Not applicable
Bill Group Information	Displays the bill group information. In addition, a context menu appears corresponding to this field which helps in navigating to other screens in the application. **Note:** It has a link. On clicking the link, the **Person**, **Account** or **Policy** screen appears where you can view the details of the bill group.	Not applicable
Policy Information	Displays the policy information. **Note:** It has a link. On clicking the link, the **Policy** screen appears where you can view the details of the policy.	Not applicable
Pricing Rule Type	Indicates the type of the pricing rule.	Not applicable
Status	Indicates the status of the pricing rule.	Not applicable
Price Item Information	Indicates the price item for which the pricing rule is created. **Note:** It has a link. On clicking the link, the **Price Item** screen appears where you can view the details of the price item.	Not applicable
Rate Option	Indicates the rate option of the discount arrangement pricing rule for the price item.	Not applicable
Pricing Start Date	Displays the date from when the pricing rule is effective.	Not applicable
Pricing End Date	Displays the date till when the pricing rule is effective.	Not applicable

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Field Name	Field Description	Mandatory (Yes or No)
Settlement Frequency	Indicates the settlement frequency which helps to determine the bill after date.	Not applicable

- **Discount Details** - Displays the eligibility criteria for a discount percentage and maximum discount amount that is allowed per claim. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Price Item Parameter	Displays the parameter using which an eligibility criteria is defined for a discount percentage and maximum amount that is allowed per claim.	Not applicable
Parameter Information	Indicates the order in which the parameter and its value should be displayed in the price item parameter information string across the application.	Not applicable
Parameter Value	Indicates the value of the parameter.	Not applicable
Parameter Value Description	Displays the description of the value, defined as a parameter.	Not applicable
Discount Percentage	Displays the discount share or discount guarantee percentage.	Not applicable
Maximum Discount Per Claim	Displays maximum discount amount which is allowed per claim. If the discount amount exceeds the maximum limit per claim, the additional amount is credited to the customer.	Not applicable

- **Discount Limits** - Displays the minimum and maximum discount limit defined on the contract. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
No Limit	Indicates the type of discount limit (minimum or maximum) on the contract.	Not applicable
Discount Credit Account	Indicates the account to which the discount is credited, when the minimum or maximum discount limit is defined on the contract.	Not applicable
Settlement Days	Indicates the number of days which help in calculating the final settlement date.	Not applicable

In addition, it contains the following fields in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Type of Discount	Displays the type of discount.	Not applicable
Select	Indicates the type of discount that is applied on the contract.	Not applicable
Limit Type	Indicates the type of limit defined in the discount arrangement pricing rule.	Not applicable
Amount Limit	Indicates the amount limit (flat minimum or maximum discount) on the contract.	Not applicable

- **Exclusion** - Displays the entity (network or provider) which is excluded in the discount arrangement pricing rule. It contains the following fields:

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Field Name	Field Description	Mandatory (Yes or No)
Exclusion Level	Indicates the entity (network hospitals or providers) that are excluded during the discount share or discount guarantee calculation.	Not applicable
Level Identifier	Displays the network or provider ID.	Not applicable

- **Characteristics** - Displays the characteristics defined for the discount arrangement pricing rule. It contains the following columns:

Column Name	Column Description	Mandatory (Yes or No)
Effective Date	Displays the date from when the characteristic is effective for the discount arrangement pricing rule.	Not applicable
Characteristic Type	Indicates the characteristic type.	Not applicable
Characteristic Value	Displays the value of the characteristic type.	Not applicable

Related Topics

For more information on...	See...
How to define a discount arrangement pricing rule for a parent customer	Defining a Discount Arrangement Pricing Rule for a Parent Customer on page 3233

Level Funded

The **Level Funded** zone displays the details of the level funded pricing rule for the respective parent customer, bill group, or a bill group using a pricing group. It contains the following sections:

- **Main** - Displays basic details of the level funded pricing rule. It contains the following columns:

Column Name	Column Description
Parent Customer Information	Displays the parent customer information. In addition, a context menu appears corresponding to this field which helps in navigating to other screens in the application.
	Note: It has a link. On clicking the link, the **Person**, **Account** or **Policy** screen appears where you can view the details of the parent customer.
Bill Group Information	Displays the bill group information. In addition, a context menu appears corresponding to this field which helps in navigating to other screens in the application.
	Note: It has a link. On clicking the link, the **Person**, **Account** or **Policy** screen appears where you can view the details of the bill group.
Policy Information	Displays the policy information.

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Column Name	Column Description
	Note: It has a link. On clicking the link, the **Policy** screen appears where you can view the details of the policy.
Pricing Rule Type	Indicates the type of the pricing rule.
Status	Indicates the status of the pricing rule.
Price Item Information	Indicates the price item for which the pricing rule is created. **Note:** It has a link. On clicking the link, the **Price Item** screen appears where you can view the details of the price item.
Parent Customer's Pricing Rule	Displays the pricing rule of the parent customer.
Pricing Start Date	Displays the date from when the pricing rule is effective.
Pricing End Date	Displays the date till when the pricing rule is effective.
Rate Option	Indicates the rate option of the level funded pricing rule for the price item.
Settlement Frequency	Indicates the settlement frequency which helps to determine the bill after date.
Settlement Fund Price Item	Indicates the price item derived from the level funded pricing rule type, used to create the level funded pricing rule type. **Note:** The settlement fund price item appears when the level funded pricing rule is created for a bill group.
Underwriter Review	Indicates whether the underwriter settlement review flag is on or off.

- **Accumulation Parameters** - Displays the accumulation parameters for a parent customer in the level funded pricing rule. It contains the following fields:

Column Name	Column Description
Accumulation Group ID	Displays an accumulation group ID which is generated when accumulation parameter values are defined for a level funded pricing rule.
Settlement Account ID	Indicates the account ID to whom the settlement amount is credited.
Incurred Start Date	Displays the incurred start date (inherited from parent customer's specific stop-loss pricing rule) based on which you want to accumulate the level funded pricing.
Incurred End Date	Displays the incurred end date (inherited from parent customer's specific stop-loss pricing rule) based on which you want to accumulate the level funded pricing.
Paid Start Date	Displays the paid start date (inherited from parent customer's specific stop-loss pricing rule) based on which you want to accumulate the level funded pricing.
Paid End Date	Displays the paid end date (inherited from parent customer's specific stop-loss pricing rule) based on which you want to accumulate the level funded pricing.
Settlement Days	Indicates the number of days as the settlement days which help in calculating the settlement date.

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Note:

The above section appears when the level funded pricing rule is created for a parent customer.

- **Accumulation Criteria** - Displays the accumulation criteria for a bill group in the level funded pricing rule. It contains the following columns:

Column Name	Column Description
Accumulation Group ID	Displays the accumulation group ID generated when the accumulation criteria values were defined for a level funding pricing rule type.
Price Item Information	Displays the price item information. **Note:** It has a link. On clicking the link, the **Price Item** screen appears where you can view the details of the price item.
Price Item Parameters	This field contains the following columns: **Column Name** / **Column Description** Price Item Parameter: Displays the multiple parameters based on which you have determined the price item utilization. **Note:** It has a link. On clicking the link, the **Parameter** screen appears where you can view the details of the parameter. Parameter Value: Displays the value of the parameter.

Note:

The above section appears when the level funded pricing rule is created for a bill group.

The accumulation criteria for each rule appears when the level funded pricing rule is created for a bill group using a pricing group.

- The **Pricing Information for rule type category : Claim** zone contains the following sections:
  - The **Claim Pricing Rule** section contains the following columns:

Column Name	Column Description
Pricing Rule Type	Indicates the claim pricing rule type effective for the level funded pricing.
Derive Using	Indicates the method through which the claim pricing rule information is derived.
Effective Claim Pricing Rule	Displays the claim pricing rule effective for pricing.

  - The **Domestic Provider Claims** section contains the following columns:

Column Name	Column Description
Exclude LF (Percentage)	Displays the billable charge line excluding the level funding charge in the percentage to create the domestic provider claim calculation lines.

  - The **Markup or Markdown Values** section contains the following columns:

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Column Name	Column Description
Pricing Strategy	Indicates the pricing strategy for the claim line items.
Markup or Markdown Type	Indicates the markup or markdown value type for the claim line items.
Markup or Markdown Amount	Displays the markup or markdown amount for the claim line items. **Note:** This field displays amount when **Markup or Markdown Type** field is set as **Flat Amount**.
Markup / Markdown Included in Settlement?	Displays whether the markup or markdown amount should be included in the level funding settlement. The valid values are:

- The **Line Items** section contains the following columns:

Column Name	Column Description
Sequence	Displays the sequence number for the line items.
Line Item	Displays the billing line items.
Include in Settlement	Indicates whether the line item should be included in the level funded claim pricing settlement.
Markup or Markdown Included in Settlement	Indicates whether markup or markdown should be included in the level funded claim settlement.
Markup or Markdown Percentage Eligibility	Indicates whether the line item is eligible or not eligible for markup or markdown percentage.
Markup or Markdown Percentage	Indicates the percentage for markup or markdown value.

Note:

The above section appears when the level funded pricing rule is created for a bill group.

- The **Pricing Information for rule type category : Ancillary** zone contains the following sections:
  - The **Ancillary Pricing Rule** section contains the following columns:

Column Name	Column Description
Pricing Rule Type	Indicates the ancillary pricing rule type effective for level funded pricing.
Derive Using	Indicates the method through which the ancillary pricing rule information is derived.
Effective Ancillary Pricing Rule	Displays the ancillary pricing rule effective for pricing.

  - The **Billable Charge Line Types** section contains the following columns:

Column Name	Column Description
Sequence	Displays the sequence number for the line items.
Billable Charge Line Type	Indicates the billable charge line type using which you want to create the calculation line for the charge (i.e. line item)
Include in Settlement	Indicates whether the billable charge line item should be included in the level funded ancillary pricing settlement.
Rate Based	Indicates that the billable charge line type is rate based.

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Column Name	Column Description
Rate	Displays the rate for the billable charge line type.
Markup / Markdown Included in Settlement?	Indicates that markup or markdown amount must be included in the level funding settlement.
Pricing Strategy	Displays the pricing strategy for the billable charge line items.
Markup or Markdown Type	Indicates the markup or markdown type for the billable charge line items.
Amount/Percentage	Displays the amount or percentage which is specified as the markup or markdown value.

Note:

The above section appears when the level funded pricing rule is created for a bill group.

- The **Pricing Information for rule type category : Discount** zone contains the following section:

Column Name	Column Description
Pricing Rule Type	Indicates the discount arrangement pricing rule type which is effective for level funding.
Derive Using	Indicates the method through which the discount arrangement pricing rule information is derived.

  - **Discount Pricing Rule** - Indicates the discount arrangement pricing rule. It contains the following columns:

Column Name	Column Description
Discount Pricing Rule	Indicates the discount arrangement pricing rule which is effective for level funding.

Note:

The above section appears when the level funded pricing rule is created for a bill group.

- The **Pricing Information for rule type category : Retention** zone contains the following section:

Column Name	Column Description
Retention Rule Type	Indicates the retention type claim based and/or retention type enrollment based pricing rule type for the level funded pricing rule.
	Note: It has a link. On clicking the link, **Pricing Rule Type** screen appears where you can view the details of the rule type.
Price Item	Indicates the price item for the level funded pricing rule.
	Note: It has a link. On clicking the link, **Price Item** screen appears where you can view the details of the price item.

Note:

The above section appears when the level funded pricing rule is created for a bill group.

- **Final Settlement Rules** - Displays the final settlement rules when the customer renews or cancels the contract. It contains the following columns:

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Column Name	Column Description
Final Settlement Mode	Displays the final settlement mode when the customer renews the level funded agreement
Final Settlement Option	Indicates the final settlement option when the customer renews the level funded agreement.
Flat/Percentage	Indicates the final settlement payment type when the customer renews the level funded agreement.
Percentage Retained	Displays the percentage retained by the ASO provider when the customer renews the level funded agreement.
Flat Effective Payout	Displays the actual amount which should be retained by the ASO provider or offered as a discount, when the customer renews the level funded agreement.

The **Renewal Decision** sub-section contains the following columns:

Column Name	Column Description
Renewal Decision	Indicates the upcoming status of the level funded contract.

- **Characteristics** - Displays the characteristics defined for the level funded pricing rule. It contains the following columns:

Column Name	Column Description
Effective Date	Displays the date from when the characteristic is effective for the level funded pricing rule.
Characteristic Type	Indicates the characteristic type.
Characteristic Value	Displays the value of the characteristic type.

Related Topics

For more information on...	See...
How to define a level funded pricing rule for a parent customer	Defining a Level Funded Pricing Rule for a Parent Customer on page 3265

Age Based Pricing Rule

The **Age Based Pricing Rule** zone displays the details of the age based pricing rule for the fully-insured group and individual customers (who is a parent customer, bill group, or a bill group's account) using a pricing group. It contains the following sections:

- **Pricing Information** - Displays basic details about the fully-insured age based pricing rule. It contains the following fields:

Column Name	Column Description
Plan Number	Displays the plan number.
Plan Name	Displays the plan name.
Plan Start Date	Displays the date from when the plan is effective.
Plan End Date	Displays the date till when the plan rule is effective.

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Column Name	Column Description
Policy Information	Displays the policy information. **Note:** It has a link. On clicking the link, the **Policy** screen appears where you can view the details of the policy.
Pricing Rule Type	Indicates the type of the pricing rule.
Price Item Information	Indicates the price item for which the pricing rule is created. **Note:** It has a link. On clicking the link, the **Price Item** screen appears where you can view the details of the price item.
Pricing Start Date	Displays the date from when the pricing rule is effective.
Pricing End Date	Displays the date till when the pricing rule is effective.
Rate Option	Indicates the rate option which is used while defining the pricing for the price item.
Modifier Applicability	Indicates modifier based on which additional fee or discount is offered to an eligible member.
Modifier Method	Indicates the method used when modifier applicability option is selected.

- **Pricing Parameters** - Displays the pricing parameter information for a fully-insured age based pricing rule. It contains the following fields:

Column Name	Column Description
Pricing Parameters	Displays the pricing and parameter details for a fully-insured age based pricing rule. It contains the following columns: **Column Name** / **Column Description** Price Item Parameter — Displays the parameter using which an age based eligibility criteria is defined. Parameter Description — Displays the description of the price item parameter. Parameter Value — Displays the value of the parameter. Parameter Value Description — Displays the description of the value, defined as a parameter.
Base Fee	Displays the fee applicable on the age limit and attributes of an eligible member.

- **Modifier Information** - Displays the modifiers based on which additional charges or discount is offered to an eligible member in a fully-insured age based pricing rule. It contains the following fields:

Column Name	Column Description
Modifier Type	Displays the type of modifier based on which you want to charge additional or offer discount to an eligible member.
Modifier Type Description	Displays the description of the modifier.
Modifier Value	Displays the value of the modifier.

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Column Name	Column Description
Modifier Value Description	Displays the description of the modifier value.
Modifier Fee	Displays the amount charged or discount offered to an eligible member.

- **Characteristics** - Lists the characteristics defined for the fully-insured age based pricing rule. It contains the following columns:

Column Name	Column Description
Effective Date	Displays the date from when the characteristic is effective for a fully-insured age based pricing rule.
Characteristic Type	Indicates the characteristic type.
Characteristic Value	Displays the value of the characteristic type.

Tier Based Pricing Rule

The **Tier Based Pricing Rule** zone displays the details of the tier based pricing rule for the fully-insured group and individual customers (who is a parent customer, bill group, or a bill group's account) using a pricing group. It contains the following sections:

- **Pricing Information** - Displays basic details about the fully-insured tier based pricing rule. It contains the following fields:

Column Name	Column Description
Plan Number	Displays the plan number.
Plan Name	Displays the plan name.
Plan Start Date	Displays the date from when the plan is effective.
Plan End Date	Displays the date till when the plan rule is effective.
Policy Information	Displays the policy information. **Note:** It has a link. On clicking the link, the **Policy** screen appears where you can view the details of the policy.
Pricing Rule Type	Indicates the type of the pricing rule.
Price Item Information	Indicates the price item for which the pricing rule is created. **Note:** It has a link. On clicking the link, the **Price Item** screen appears where you can view the details of the price item.
Pricing Start Date	Displays the date from when the pricing rule is effective.
Pricing End Date	Displays the date till when the pricing rule is effective.
Rate Option	Indicates the rate option which is used while defining the pricing for the price item.

- **Pricing Parameters** - Displays the pricing information defined for the fully-insured tier based pricing rule. It contains the following fields:

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Column Name	Column Description
Pricing Parameters	Displays the pricing parameter details for the fully-insured tier based pricing rule. It contains the following columns: **Column Name** / **Column Description** Price Item Parameter – Displays the parameter using which the membership tier level based criteria is defined. Parameter Description – Displays the description of the price item parameter. Parameter Value – Displays the value of the parameter. Parameter Value Description – Displays the description of the value, defined as a parameter.
Fee	Displays the fee applicable on the membership tier level and employee attributes of an eligible member.

- **Characteristics** - Lists the characteristics defined for the fully-insured tier based pricing rule. It contains the following columns:

Column Name	Column Description
Effective Date	Displays the date from when the characteristic is effective.
Characteristic Type	Indicates the characteristic type.
Characteristic Value	Displays the value of the characteristic type.

Additional Fee Pricing Rule

The **Additional Fee Pricing Rule** zone displays the details of the additional fee pricing rule for the fully-insured group customer (who is a parent customer, bill group, or a bill group's account) using a pricing group. It contains the following sections:

- **Pricing Information** - Displays basic details about the additional fee pricing rule. It contains the following fields:

Column Name	Column Description
Plan Number	Displays the plan number.
Plan Name	Displays the plan name.
Plan Start Date	Displays the date from when the plan is effective for the additional fee pricing rule.
Plan End Date	Displays the date till when the plan rule is effective for the additional fee pricing rule.
Policy Information	Displays information about the policy. **Note:** It has a link. On clicking the link, the **Policy** screen appears where you can view the details of the policy.
Pricing Rule Type	Indicates the type of the pricing rule.
Price Item Information	Indicates the price item for which the additional fee pricing rule is created.

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Column Name	Column Description
	Note: It has a link. On clicking the link, the **Price Item** screen appears where you can view the details of the price item.
Pricing Start Date	Displays the date from when the pricing rule is effective.
Pricing End Date	Displays the date till when the pricing rule is effective.
Rate Option	Indicates the rate option which is used while defining the pricing for the price item.
Modifier Applicability	Indicates modifier based on which additional fee or discount is offered to an eligible member.
Modifier Method	Indicates the method used when modifier applicability option is selected.
Pricing Type	Indicates the type of pricing defined for the additional fee pricing rule. The valid values are: • Flat • Percentage **Note:** This field appears when the **Pricing Type** option is selected.

- **Pricing Parameters** - Displays the pricing parameter information for an additional fee pricing rule. It contains the following fields:

Column Name	Column Description
Pricing Parameters	Displays the pricing and parameter details for an additional fee pricing rule. It contains the following columns: **Column Name** / **Column Description** Price Item Parameter: Displays the parameter using which an age based eligibility criteria is defined. Parameter Description: Displays the description of the price item parameter. Parameter Value: Displays the value of the parameter. Parameter Value Description: Displays the description of the value, defined as a parameter.
Base Fee	Displays the fee applicable on the age limit and attributes of an eligible member.

- **Modifier Information** - Displays the modifiers based on which additional fee or discount is offered to an eligible member in an additional fee pricing rule. It contains the following fields:

Column Name	Column Description
Modifier Type	Displays the type of modifier based on which you want to charge additional or offer discount to an eligible member.
Modifier Type Description	Displays the description of the modifier.
Modifier Value	Displays the value of the modifier.
Modifier Value Description	Displays the description of the modifier value.
Modifier Fee	Displays the amount charged or discount offered to an eligible member.

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- **Characteristics** - Lists the characteristics defined for the an additional fee pricing rule. It contains the following columns:

Column Name	Column Description
Effective Date	Displays the date from when the characteristic is effective for a fully-insured age based pricing rule.
Characteristic Type	Indicates the characteristic type.
Characteristic Value	Displays the value of the characteristic type.

Discount Charge Pricing Rule

The **Discount Charge Pricing Rule** zone displays the details of the discount charge pricing rule for the fully-insured individual or group customer (who is a parent customer, bill group, or a bill group's account) using a pricing group. It contains the following sections:

- **Pricing Information** - Displays basic details about the discount charge pricing rule. It contains the following fields:

Column Name	Column Description
Plan Number	Displays the plan number.
Plan Name	Displays the plan name.
Plan Start Date	Displays the date from when the plan is effective for the additional fee pricing rule.
Plan End Date	Displays the date till when the plan rule is effective for the additional fee pricing rule.
Policy Information	Displays information about the policy.
	Note: It has a link. On clicking the link, the **Policy** screen appears where you can view the details of the policy.
Health Plan	Displays the health plan.
	Note: This field appears only when you are viewing the discount charge pricing rule of a fully-insured individual.
Health Product	Displays the health product.
	Note: This field appears only when you are viewing the discount charge pricing rule of a fully-insured individual.
Pricing Rule Type	Indicates the type of the pricing rule.
Price Item Information	Indicates the price item for which the discount charge pricing rule is created.
	Note: It has a link. On clicking the link, the **Price Item** screen appears where you can view the details of the price item.
Pricing Start Date	Displays the date from when the pricing rule is effective.
Pricing End Date	Displays the date till when the pricing rule is effective.
Rate Option	Indicates the rate option which is used while defining the pricing for the price item.

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Column Name	Column Description
Modifier Applicability	Indicates modifier based on which discount is offered to an eligible member.
Modifier Method	Indicates the method used when modifier applicability option is selected.
Pricing Type	Indicates the type of pricing defined for the discount charge pricing rule. The valid values are: • Flat • Percentage **Note:** This field appears when the **Pricing Type** option is selected.

- **Pricing Parameters** - Displays the pricing parameter information for a discount charge pricing rule. It contains the following fields:

Column Name	Column Description
Pricing Parameters	Displays the pricing and parameter details for an additional charge pricing rule. It contains the following columns: **Column Name** / **Column Description** Price Item Parameter — Displays the parameter using which an age based eligibility criteria is defined. Parameter Description — Displays the description of the price item parameter. Parameter Value — Displays the value of the parameter. Parameter Value Description — Displays the description of the value, defined as a parameter.
Base Fee	Displays the fee applicable on the age limit and attributes of an eligible member.

- **Modifier Information** - Displays the modifiers based on which discount is offered to an eligible member in an discount charge pricing rule. It contains the following fields:

Column Name	Column Description
Modifier Type	Displays the type of modifier based on which you want to offer discount to an eligible member.
Modifier Type Description	Displays the description of the modifier.
Modifier Value	Displays the value of the modifier.
Modifier Value Description	Displays the description of the modifier value.
Modifier Fee	Displays the discount offered to an eligible member.

- **Characteristics** - Lists the characteristics defined for the discount charge pricing rule. It contains the following columns:

Column Name	Column Description
Effective Date	Displays the date from when the characteristic is effective for the discount charge pricing rule.
Characteristic Type	Indicates the characteristic type.

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Column Name	Column Description
Characteristic Value	Displays the value of the characteristic type.

Chapter 10

Health Product 360° View

Topics:

- Prerequisites
- Health Product 360° View (Used for Searching)
- Health Product 360° Information (Used for Viewing)
- Health Plan 360° Information (Used for Viewing)

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

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

Prerequisites

To setup the **Health Product 360° View** feature, you need to do the following:

- Define the required characteristic types where the characteristic entity is set to **Health Product**
- Define the required characteristic types where the characteristic entity is set to **Health Plan**
- Define the values for the **PRODUCT_HC_CAT_FLG** lookup field
- Define the values for the **PRODUCT_LOB_FLG** lookup field
- Define the values for the **PRODUCT_TYPE_FLG** lookup field
- Define the values for the **PRODUCT_LOB_CAT_FLG** lookup field
- Define the values for the **PRODUCT_SUB_TYPE_FLG** lookup field

Health Product 360° View (Used for Searching)

The **Health Product 360° View** screen allows you to search for a health product and health plan using various search criteria. It contains the following zone:

- 360° Search on page 726

Through this screen, you can navigate to the following screen:

- Health Product 360° Information (Used for Viewing) on page 737

Related Topics

For more information	See...
How to search for a health product	Searching for a Health Product on page 734
How to search for a health plan	Searching for a Health Plan on page 735
How to view the 360° information of a health product	Viewing the Details of a Health Product on page 736
How to view the 360° information of a health plan	Viewing the Details of a Health Plan on page 736

360° Search

The **360° Search** zone allows you to search for a health product and health plan using various search criteria. It contains the following section:

- **Search Criteria** - The **Search Criteria** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Search By	Used to indicate whether you want to search for a health product or a health plan. The valid values are: • Health Product Details • Health Plan Details **Note:** By default, the **Health Product Details** option is selected.	Yes

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<table>
<tr><th>Field Name</th><th>Field Description</th><th>Mandatory (Yes or No)</th></tr>
<tr><td>Description</td><td>You can use this field for the following search parameters:<table><tr><th>If the field is used for...</th><th>Then the purpose of Description is...</th></tr><tr><td>Health Product Details</td><td>Used to search health products which are created using a particular description.

Note: This field appears when the Health Product Details option is selected from the Search By list.</td></tr><tr><td>Health Plan Details</td><td>Used to search health plans which are created using a particular description.

Note: This field appears when the Health Plan Details option is selected from the Search By list.</td></tr></table></td><td>No</td></tr>
<tr><td>Health Product</td><td>Used to search health products with a particular name.

Note: This field appears when the Health Product Details option is selected from the Search By list.</td><td>No</td></tr>
<tr><td>Product Type</td><td>Used to search health products which are classified based on the provider network.

Note:
This field appears when the Health Product Details option is selected from the Search By list.
You must specify a value which is already defined in the PRODUCT_TYPE_FLG lookup field. It must be in the Active status.</td><td>No</td></tr>
<tr><td>Product Healthcare Category</td><td>Used to search health products which belong to a health care category.

Note:
This field appears when the Health Product Details option is selected from the Search By list.
You must specify a value which is already defined in the PRODUCT_HC_CAT_FLG lookup field and is in the Active status.</td><td>No</td></tr>
<tr><td>Product LOB</td><td>Used to search health products belonging to a particular line of business.</td><td>No</td></tr>
</table>

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<table>
<tr><th>Field Name</th><th>Field Description</th><th>Mandatory (Yes or No)</th></tr>
<tr><td></td><td>Note:
This field appears when the Health Product Details option is selected from the Search By list.
You must specify a value which is already defined in the PRODUCT_LOB_FLG lookup field and is in the Active status.</td><td></td></tr>
<tr><td>Product LOB Category</td><td>Used to search health products belonging to a particular line of business category.
Note:
This field appears when the Health Product Details option is selected from the Search By list.
You must specify a value which is already defined in the PRODUCT_LOB_CAT_FLG lookup field and is in the Active status.</td><td>No</td></tr>
<tr><td>Bundled Product Flag</td><td>Used to search health products which are indicated as bundled product.
Note: This field appears when the Health Product Details option is selected from the Search By list.</td><td>Yes (Conditional)
Note: This field is required when you are searching for the bundled products.</td></tr>
<tr><td>Bundled Products</td><td>Used to search health products which are included in the bundled product.
Note: This field appears when the Health Product Details option is selected from the Search By list.</td><td>Yes (Conditional)
Note: This field is required when you are searching for the bundled products.</td></tr>
<tr><td>Start Date</td><td>You can use this field for the following search parameters:<table><tr><th>If the field is used for...</th><th>Then the purpose of Start Date is...</th></tr><tr><td>Health Product Details</td><td>Used to search health products which are effective from a particular date.
Note:
The health product start date cannot be later than the health product end date.
This field appears when the Health Product Details option is selected from the Search By list.</td></tr></table></td><td>No</td></tr>
</table>

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<table>
<tr><th>Field Name</th><th>Field Description</th><th>Mandatory (Yes or No)</th></tr>
<tr><td></td><td>
<table>
<tr><th>If the field is used for...</th><th>Then the purpose of Start Date is...</th></tr>
<tr><td>Health Plan Details</td><td>Used to search health plans which are effective from a particular date.

Note:
The health plan start date cannot be later than the health plan end date.
The health plan start date cannot be earlier than the health product start date and later than the health product end date.
This field appears when the Health Plan Details option is selected from the Search By list.</td></tr>
</table>
</td><td></td></tr>
<tr><td>End Date</td><td>You can use this field for the following search parameters:
<table>
<tr><th>If the field is used for...</th><th>Then the purpose of End Date is...</th></tr>
<tr><td>Health Product Details</td><td>Used to search health products which are effective till a particular date.

Note:
The health product end date cannot be earlier than the health product start date.
This field appears when the Health Product Details option is selected from the Search By list.</td></tr>
<tr><td>Health Plan Details</td><td>Used to search health plans which are effective till a particular date.

Note:
The health plan end date cannot be earlier than the health plan start date.
The health plan end date cannot be earlier than the health product start date and later than the health product end date.
This field appears when the Health Plan Details option is selected from the Search By list.</td></tr>
</table>
</td><td>No</td></tr>
</table>

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<table>
<tr><th>Field Name</th><th>Field Description</th><th>Mandatory (Yes or No)</th></tr>
<tr><td>Characteristic Type</td><td>You can use this field for the following search parameters:<table><tr><th>If the field is used for...</th><th>Then the purpose of Characteristic Type is...</th></tr><tr><td>Health Product Details</td><td>Used to search health products with a particular type of characteristic.

Note: This field appears when the Health Product Details option is selected from the Search By list.</td></tr><tr><td>Health Plan Details</td><td>Used to search health plans with a particular type of characteristic.

Note: This field appears when the Health Plan Details option is selected from the Search By list.</td></tr></table></td><td>No</td></tr>
<tr><td>Characteristic Value</td><td>You can use this field for the following search parameters:<table><tr><th>If the field is used for...</th><th>Then the purpose of Characteristic Value is...</th></tr><tr><td>Health Product Details</td><td>Used to search health products with a particular characteristic.

Note:
This field appears when the Health Product Details option is selected from the Search By list.
On specifying the value for a predefined characteristic type, the description of the characteristic value appears corresponding to the Characteristic Value field.</td></tr><tr><td>Health Plan Details</td><td>Used to search health plans with a particular characteristic.

Note:
This field appears when the Health Plan Details option is selected from the Search By list.
On specifying the value for a predefined characteristic type, the description of the characteristic value appears corresponding to the Characteristic Value field.</td></tr></table></td><td>Yes (Conditional)

Note: If you specify the characteristic type as a search criteria, you have to enter the characteristics value.</td></tr>
</table>

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Field Name	Field Description	Mandatory (Yes or No)
Health Plan	Used to search health plans with a particular name. **Note:** This field appears when the **Health Plan Details** option is selected from the **Search By** list.	No
Add On Plan	Used to search health plans which are defined as an add-on health plan. **Note:** This field appears when the **Health Plan Details** option is selected from the **Search By** list.	No
Ancillary Benefits	Used to search health plans which provide ancillary benefits. **Note:** This field appears when the **Health Plan Details** option is selected from the **Search By** list.	No
Charitable Plan	Used to search health plans which provide subsidized health insurance coverage. **Note:** This field appears when the **Health Plan Details** option is selected from the **Search By** list.	No
Grandfather Plan	Used to search health plans which are defined as grandfathered health plan. **Note:** This field appears when the **Health Plan Details** option is selected from the **Search By** list.	No
Rider Benefits	Used to search health plans which provide rider benefits. **Note:** This field appears when the **Health Plan Details** option is selected from the **Search By** list.	No
ACA Qualified	Used to search health plans which provide Affordable Care Act (ACA) qualified health insurance coverage. **Note:** This field appears when the **Health Plan Details** option is selected from the **Search By** list.	No
Product Sub Type	Used to search health plans with medical accounts that are linked to the health product. **Note:** This field appears when the **Health Plan Details** option is selected from the **Search By** list.	No
Product Category	Used to search health plans which are associated with a particular product category. **Note:** This field appears when the **Health Plan Details** option is selected from the **Search By** list.	No
Product LOB	Used to search health plans which are associated with a particular product's line of business.	No

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Field Name	Field Description	Mandatory (Yes or No)
	Note: This field appears when the **Health Plan Details** option is selected from the **Search By** list.	
Status	Used to search health plans with a particular status. The valid values are: • Active • Inactive **Note:** This field appears when the **Health Plan Details** option is selected from the **Search By** list.	No

Note: You must specify at least one search criterion while searching for a health product or health plan.

- **Search Results** - On clicking the **Search** button, the search results appear based on the specified search criteria. The **Search Results** section contains the following columns:

Column Name	Column Description
Health Product	Displays information about the health product. **Note:** It has a link. On clicking the link, the **Health Product 360° Information** screen appears where you can view the details of the respective health product. This column appears when the **Health Product Details** option is selected from the **Search By** list.
Description	Displays information based on the following search parameter:

If the search is performed for...	Then the purpose of Description is...
Health Product Details	Displays the description of the health product. **Note:** This column appears when the **Health Product Details** option is selected from the **Search By** list.
Health Plan Details	Displays the description of the health plan. **Note:** This column appears when the **Health Plan Details** option is selected from the **Search By** list.

Product Type	Indicates how the health product can be classified based on the provider network. **Note:** This column appears when the **Health Product Details** option is selected from the **Search By** list.
Product Healthcare Category	Indicates the health care category to which the health product belongs.

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<table>
<tr><th>Column Name</th><th>Column Description</th></tr>
<tr><td></td><td>Note: This column appears when the Health Product Details option is selected from the Search By list.</td></tr>
<tr><td>Product LOB</td><td>Indicates the line of business to which the health product belongs.

Note: It has a link. On clicking the link, the Health Product 360° Information screen appears where you can view the details of the respective health product. This column appears when the Health Product Details option is selected from the Search By list.</td></tr>
<tr><td>Product LOB Category</td><td>Indicates the product line of business category.

Note: This column appears when the Health Product Details option is selected from the Search By list.</td></tr>
<tr><td>Status</td><td>Indicates the status of the health product. The valid legends are:
• - Indicates the status of the health product as Active.
• - Indicates the status of the health product as Inactive.

Note: This column appears when the Health Product Details option is selected from the Search By list.</td></tr>
<tr><td>Health Plan</td><td>Displays information about the health plan.

Note:
It has a link. On clicking the link, the Health Plan 360° Information screen appears where you can view the details of the respective health plan.
This column appears when the Health Plan Details option is selected from the Search By list.</td></tr>
<tr><td>Add On Plan</td><td>Indicates whether the health plan is an add-on health plan. The valid values are:
• Yes
• No

Note: This column appears when the Health Plan Details option is selected from the Search By list.</td></tr>
<tr><td>Start Date</td><td>Displays information based on the following search parameter:

<table>
<tr><th>If the search is performed for...</th><th>Then the purpose of Start Date is...</th></tr>
<tr><td>Health Product Details</td><td>Displays the date from when the health product is effective.

Note: This column appears when the Health Product Details option is selected from the Search By list.</td></tr>
<tr><td>Health Plan Details</td><td>Displays the date from when the health plan is effective.</td></tr>
</table>
</td></tr>
</table>

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Column Name	Column Description
	If the search is performed for... / **Then the purpose of Start Date is...** **Note:** This column appears when the **Health Plan Details** option is selected from the **Search By** list.
End Date	Displays information based on the following search parameter: **If the search is performed for...** / **Then the purpose of End Date is...** Health Product Details: Displays the date till when the health product is effective. **Note:** This column appears when the **Health Product Details** option is selected from the **Search By** list. Health Plan Details: Displays the date till when the health plan is effective. **Note:** This column appears when the **Health Plan Details** option is selected from the **Search By** list.
Status	Indicates the status of the health plan. The valid legends are: • - Indicates the status of the health product as **Active**. • - Indicates the status of the health product as **Inactive**. **Note:** This column appears when the **Health Plan Details** option is selected from the **Search By** list.

Note: Pagination is used to display limited number of records in the **Search Results** section. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

Related Topics

For more information on...	See...
How to search for a health product	Searching for a Health Product on page 734
How to search for a health plan	Searching for a Health Plan on page 735
How to view the 360° information of a health product	Viewing the Details of a Health Product on page 736
How to view the 360° information of a health plan	Viewing the Details of a Health Plan on page 736

Searching for a Health Product

Prerequisites

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To search for a health product, you should have:

- Values defined for the **PRODUCT_TYPE_FLG** lookup.
- Values defined for the **PRODUCT_HC_CAT_FLG** lookup.
- Values defined for the **PRODUCT_LOB_FLG** lookup.
- Characteristic types defined in the application (where the characteristic entity is set to **Health Product**)

Procedure

To search for a health product:

1. Click the **Menu** link in the **Application** toolbar.
   A list appears.
2. From the **Main** menu, click **Pricing Management** and then click **Health Product 360° View**.
   The **Health Product 360° View** screen appears.
3. Select the **Health Product Details** option from the **Search By** list to indicate that you want to search for a health product.
4. Enter the required search criteria in the **360° Search** zone.

> **Note:**
>
> ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.
>
> You must specify at least one search criterion while searching for a health product.
>
> The **Advanced Search** link appears in the right side of the **360° Search** zone. On clicking the **Advanced Search** link, additional fields appear in the zone which help you to refine the search.
>
> If you select a predefined characteristic type, the Search (🔍) icon appears corresponding to the **Characteristic Value** field. On clicking the **Search** icon, you can search for a predefined characteristic value.

5. Click **Search**.
   A list of health products that meet the search criteria appears in the **Search Results** section.

Related Topics

For more information on...	See...
Health Product 360° View screen	Health Product 360° View (Used for Searching) on page 726
360° Search zone	360° Search on page 726

Searching for a Health Plan

Prerequisites

To search for a health plan, you should have:

- Values defined for the **PRODUCT_SUB_TYPE_FLG** lookup.
- Values defined for the **PRODUCT_HC_CAT_FLG** lookup.
- Values defined for the **PRODUCT_LOB_FLG** lookup.
- Characteristic types defined in the application (where the characteristic entity is set to **Health Plan**)

Procedure

To search for a health plan:

1. Click the **Menu** link in the **Application** toolbar.

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A list appears.

2. From the **Main** menu, click **Pricing Management** and then click **Health Product 360° View**..
   The **Health Product 360° View** screen appears.
3. Select the **Health Plan Details** option from the **Search By** list to indicate that you want to search for a health plan.
4. Enter the required search criteria in the **360° Search** zone.

> **Note:**
>
> ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.
>
> You must specify at least one search criterion while searching for a health plan.
>
> The **Advanced Search** link appears in the right side of the **360° Search** zone. On clicking the **Advanced Search** link, additional fields appear in the zone which help you to refine the search.
>
> If you select a predefined characteristic type, the Search (🔍) icon appears corresponding to the **Characteristic Value** field. On clicking the **Search** icon, you can search for a predefined characteristic value.

5. Click **Search**.
   A list of health plans that meet the search criteria appears in the **Search Results** section.

Related Topics

For more information on...	See...
Health Product 360° View screen	Health Product 360° View (Used for Searching) on page 726
360° Search zone	360° Search on page 726

Viewing the Details of a Health Product

Procedure

To view the details of a health product:

1. Search for the health product in the **Health Product 360° View** screen.
2. In the **Search Results** section, click the link in the **Health Product** column whose *d*etails you want to view.

   The **Health Product 360° Information** screen appears.
3. View the details of the health product in the **Product Information** zone.

Related Topics

For more information on...	See...
How to search for a heath product	Searching for a Health Product on page 734
Product Information zone	Product Information on page 737
Product Characteristics zone	Product Characteristics on page 738
Health Plans zone	Health Plans on page 738

Viewing the Details of a Health Plan

Procedure

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To view the details of a health plan:

1. Search for the health plan in the **Health Product 360° View** screen.
2. In the **Search Results** section, click the link in the**Health Plan** column whose *d*etails you want to view.

   The **Health Plan 360° Information** screen appears.
3. View the details of the a health plan in the **Plan Information** zone.

Related Topics

For more information on...	See...
How to search for a health plan	Searching for a Health Plan on page 735
Plan Information zone	Plan Information on page 739
Product Information zone	Product Information on page 737
Plan Characteristics zone	Plan Characteristics on page 740
Pricing Rule zone	Pricing Rules on page 741

Health Product 360° Information (Used for Viewing)

The **Health Product 360° Information** screen allows you to:

- View the details of the health product.
- View the characteristics of the health product.
- View the health plans associated with the health product.

It contains the following zones:

- Product Information on page 737
- Product Characteristics on page 738
- Health Plans on page 738

Related Topics

For more information on...	See...
How to view 360° information of the health product	Viewing the Details of a Health Product on page 736

Product Information

The **Product Information** zone displays the details of the health product. It contains the following fields:

Field Name	Field Description
Health Product	Displays information about the health product. In addition, a legend appears corresponding to this field which indicates the status of the health product.
	Note: • - Indicates that the health product is **Active**. • - Indicates that the health product is **Inactive**.

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Field Name	Field Description
Product Health Category	Indicates the health care category to which the health product belongs.
Product Type	Indicates how the health product can be classified based on the provider network.
Product Sub Type	Indicates the type of medical accounts that are linked to the health product.
Start Date	Displays the date from when the health product is effective.
End Date	Displays the date till when the health product is effective.
Product LOB	Indicates the line of business to which the health product belongs.
Product LOB Category	Indicates the line of business category to which the health product belongs.
Product Administration	Displays the name of the agency which administers the health product.
Bundled Product Flag	Indicates whether the health product is a bundled product.
Bundled Products	Displays the health products which are included in the bundled product.

Product Characteristics

The **Product Characteristics** zone lists the characteristics of the health product. It contains the following columns:

Column Name	Column Description
Effective Date	Displays the date from when the characteristic is effective for the health product.
Characteristic Type	Displays the characteristic type.
Characteristic Value	Displays the value of the characteristic type.
Description	Displays the description of the characteristic value.
	Note: The data appears in this column when the type of characteristic value is set to **Predefined Value**.

You can filter the list using the **Characteristic Type** field available in the **Filter** area. By default, the **Filter** area is hidden. You can view the **Filter** area by clicking the **Filters** (▽) icon in the upper right corner of this zone.

You can change the layout of this zone. For more information on how to change the layout, see Changing the Layout on page 4410.

Health Plans

The **Health Plans** zone displays the details of the health plan. It contains the following columns:

Column Name	Column Description
Health Plan	Displays information about the health plan.
	Note: It has a link. On clicking the link, the **Health Plan 360° Information** screen appears where you can view the details of the health plan.

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Column Name	Column Description
Description	Displays the description of the health plan.
Add-On Plan	Indicates whether the health plan is an add-on health plan.
Start Date	Displays the date from when the health plan is effective.
End Date	Displays the date till when the health plan is effective.
Status	Indicates the status of the health plan. The valid legends are: • - Indicates the status of the health product as **Active**. • - Indicates the status of the health product as **Inactive**.

You can filter the list using various search criteria (such as **Plan Description** and **Status**) available in the **Filter** area. By default, the **Filter** area is hidden. You can view the **Filter** area by clicking the **Filters** (▽) icon in the upper right corner of this zone.

You can change the layout of this zone. For more information on how to change the layout, see Changing the Layout on page 4410.

Health Plan 360° Information (Used for Viewing)

The **Health Product 360° Information** screen allows you to:

- View the details of the health product and health plan.
- View the characteristics of the health plan.
- View the pricing rules associated with the health plan.

It contains the following zones:

- Plan Information on page 739
- Product Information on page 737
- Plan Characteristics on page 740
- Pricing Rules on page 741

Related Topics

For more information on...	See...
How to view 360° information of the health plan	Viewing the Details of a Health Plan on page 736

Plan Information

The **Plan Information** zone displays the details of the health plan. It contains the following fields:

Field Name	Field Description
Health Plan	Displays information about the health plan. In addition, a legend appears corresponding to this field which indicates the status of the health plan.
	Note: • - Indicates that the health plan is **Active**. • - Indicates that the health plan is **Inactive**.

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Field Name	Field Description
Add-On Plan	indicate whether the health plan is an add-on health plan.
Start date	Displays the date from when the health plan is effective.
End Date	Displays the date till when the health plan is effective.
Charitable Plan	Indicates whether the health plan provides subsidized health insurance coverage.
Standard Plan	Indicates the standard plan in the health plan.
ACA Qualified	Indicates whether the health plan provides standard health insurance coverage.
Grandfather Plan	Indicates whether the health plan is a grandfathered health plan.
Ancillary Benefits	Indicates whether the health plan provides ancillary benefits.
Rider Benefits	Indicates whether the health plan provides rider benefits.

Product Information

The **Product Information** zone displays the details of the health product. It contains the following fields:

Field Name	Field Description
Health Product	Displays information about the health product. In addition, a legend appears corresponding to this field which indicates the status of the health product. **Note:** • - Indicates that the health product is **Active**. • - Indicates that the health product is **Inactive**.
Product Health Category	Indicates the health care category to which the health product belongs.
Product Type	Indicates how the health product can be classified based on the provider network.
Product Sub Type	Indicates the type of medical accounts that are linked to the health product.
Start Date	Displays the date from when the health product is effective.
End Date	Displays the date till when the health product is effective.
Product LOB	Indicates the line of business to which the health product belongs.
Product LOB Category	Indicates the line of business category to which the health product belongs.
Product Administration	Displays the name of the agency which administers the health product.
Bundled Product Flag	Indicates whether the health product is a bundled product.
Bundled Products	Displays the health products which are included in the bundled product.

Plan Characteristics

The **Plan Characteristics** zone lists the characteristics of the health plan. It contains the following columns:

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Column Name	Column Description
Effective Date	Displays the date from when the characteristic is effective for the health plan.
Characteristic Type	Indicates the characteristic type.
Characteristic Value	Displays the value of the characteristic type.
Description	Displays the description of the characteristic value.
	Note: The data appears in this column when the type of characteristic value is set to **Predefined Value**.

Note:

Pagination is used to display limited number of records in this zone. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

You can filter the list using the **Characteristic Type** field available in the **Filter** area. By default, the **Filter** area is hidden. You can view the **Filter** area by clicking the **Filters** (▽) icon in the upper right corner of this zone.

You can change the layout of this zone. For more information on how to change the layout, see Changing the Layout on page 4410.

Pricing Rules

The **Pricing Rules** zone lists the pricing rules of the health plan. It contains the following columns:

Column Name	Column Description
Price Item Information	Displays the price item or price item bundle code.
	Note: It has a link. On clicking the link, the **Price Item** screen appears where you can view the details of the respective price item.
Pricing Rule Type Information	Displays the pricing rule type using which the pricing rule is created.
	Note: It has a link. On clicking the link, the **Pricing Rule Type** screen appears where you can view the details of the pricing rule type.
Start Date	Displays the date from when the pricing rule is effective.
End Date	Displays the date till when the pricing rule is effective.
Eligibility Parameters	On Clicking the **Eligibility Parameters** (●) icon, the **Eligibility Parameters** screen appears where you can view the eligible parameters of the pricing rule.
Rate Information	On Clicking the **Rate Information** ( ) icon, the **Rate Information** screen appears where you can view the rate information details of a pricing rule.
Status	Indicates the status of the pricing rule. The valid legends are: • ● - Indicates that the pricing rule is **Active**. • ● - Indicates that the pricing rule is **Inactive**.

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Note:

You can view the 360° information of the pricing rule, by clicking the **View** (🔗) icon corresponding to the record in the **Pricing Rule** zone.

Pagination is used to display limited number of records in this zone. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

You can filter the list using various search criteria (such as, **Status**, **Price Item**, **Start Date**, **End Date** and **Pricing Information**) available in the **Filter** area. By default, the **Filter** area is hidden. You can view the **Filter** area by clicking the **Filters** (▽) icon in the upper right corner of this zone.

Chapter 11

Pricing Management

Topics:

- Prerequisites
- Pricing Methodologies and Pricing Variation Based on Parameters (Health Insurance Business)
- Parameter
- Price Item (Health Insurance Business)
- Price List
- Rate Definition
- Tiering Criterion

Oracle Revenue Management and Billing allows you to define prices for premiums, various fees, credits, discounts, and taxes that are defined as price items. Price for the price item may vary based on various attributes, which are defined as parameters in the system. Parameter values are derived either from transaction attributes (for example, for calculating claim based fees for a self-funded customer, pricing may vary based on claim transaction's health coverage class) or based on a field or characteristic of entities (for example, for calculating premium, pricing may vary based on member person's characteristic; whether a smoker or non-smoker). The system also supports deriving the pricing parameter through an algorithm, thereby enabling the custom derivation based on requirements.

Based on the line of business and the type of charge, you can define standard pricing which is common for multiple customers (for example, pricing defined for a health plan is applicable for all the subscribers subscribing to the health plan) or customer-specific pricing (for example, for fully-insured group customer, the pricing is specific to the group and you can define the policy plan level pricing in the system to achieve this. For more information about the fully-insured pricing, see Fully-Insured Pricing on page 3367.

The system enables you to define pricing at various levels in a customer hierarchy (for example, for a self-funded group customer, the pricing can be defined at the bill group level as well as at the parent customer level). If pricing is defined at multiple levels for a customer, the precedence is given to the pricing based on the level while searching for the pricing. For example, if pricing is defined for a price item at the bill group level as well as the parent customer level, the bill group level pricing takes precedence over the parent customer level pricing. Also, the parent customer level pricing is inherited by all the bill groups.

The pricing is triggered based on the transactions to calculate various charges or credit amounts eligible for a transaction. For example, for a self-funded customer, claim amounts with additional fees and markups, claim based fees, stop loss is calculated for claim transactions, enrollment based retention fees are calculated based on enrollment transactions, and ancillary fees are calculated based on ancillary transactions. For more information about the self-funded pricing, see Self-Funded Pricing on page 2869.

Transaction Based Pricing is invoked using the **Transaction Feed Management** module which processes different types of transactions **(for example, claim, capitation, ancillary, enrollment, etc.)** using the configurable validation and mapping rules to invoke the eligible pricing rules. For more information about the transaction feed management, see Transaction Feed Management on page 1131.

Pricing can also be triggered **based on qualifying life events** (for example, premium is calculated when a new membership is added, or a new member

is added to an existing membership, or every time the plan pricing is revised, etc.). The entity audit framework enables you to define various events for which pricing should be revised. For example, **addition of a new membership, addition of a new member, updates to the plan pricing**, **or the membership attributes which you want to monitor for premium change, etc**. The system enables you to define the algorithms to price the eligible events by invoking pricing rules. For more information about the entity audit framework, see Entity Audit on page 3759.

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Prerequisites

To setup the pricing management feature, you need to do the following:

- Define the required SQIs and divisions in the system.
- Define the required parameters in the system.
- Define the tiering setup for rate components in the system.
- Define the required price items in the system.

Pricing Methodologies and Pricing Variation Based on Parameters (Health Insurance Business)

The specialized pricing methodologies are required for pricing the fully-insured and self-funded customers. Therefore, an out of box pricing solution is provided to the fully-insured and self-funded customers through distinct pricing rule types.

Fully-Insured Pricing

Age Banded Premium Pricing

Age banded premium pricing is one of the methodologies for premium calculation. In this methodology, Premium calculation is done **by determining the premium of each member separately mainly based on the age band in which the member falls, and then aggregating** these to derive the overall premium amount for a membership.

Apart from member's age, premium of age banded plans can vary based upon **different parameters; be it member's attribute or plan level attribute or LOB specific attributes**. For example, pricing can vary by different population segment characteristics such as Employee Type (Retiree, COBRA and Active) and/or by different regions, Employee Status (Permanent/contractual) etc. Age-banded pricing may also vary by different modifiers such as Tobacco usage, Gender etc.

ORMB provides Out of Box Pricing Rule Type ‘Age Banded’. Using the same you can define pricing rule to define age-banded plan pricing. Pricing variation can be defined based on the pricing eligibility parameters where the source can be defined as Membership characteristics or Member characteristics or Plan characteristics. User can set **base fee** for set of parameters and can also set the **percentage or flat amount to be added over the base fee for each modifiers**.

Age-banded premium calculation algorithm which is configured in Age-banded pricing rule type process the premium pricing for each membership, derive the premium amount for each member and then aggregates the amount to derive the overall premium amount for a membership. **Maximum number of eligible dependents and the order of selection of the dependents like oldest first or youngest first is also configurable at Plan or State level**.

Age Banded Example:

Demo Corporation has a fully-insured group policy for the employees and its monthly premium is calculated through an age based pricing rule.

The following table lists the base premium for different age groups and locations or rating areas defined in an age based pricing rule:

Age Band	Location/Rating Area	Base Premium
Up to 15 Years	North California	$200
	South California	$210
16 to 18 Years	North California	$210

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Age Band	Location/Rating Area	Base Premium
	South California	$220
18 to 40 Years	North California	$220
	South California	$240
40 to 60 Years	North California	$250
	South California	$260
60+ Years	North California	$280
	South California	$290

On Top of the base premium, additional 2% premium will be charged if the member is smoker

State of California is configured with the following pricing rules :

Max. No of Eligible Dependents = 2

Order of Dependent Selection = Oldest first

New Born Gift Days = 30

Proration Rule Defined for the account : Mid Month i.e. Member joining before 15th will be charged the premium for the entire month

Example 1:

North California Based Employee John Doe, a 45 years old smoker who enrolled himself with his spouse Mary Doe (Age 40) and daughter Elsa Doe aged 13, son Bob Doe aged 10 and daughter Laura Doe aged 8.

The following table illustrates how the premium is calculated for different members using an age based pricing rule:

Member	Reason	Premium Contribution
John Doe	Base Premium	$250
	Smoker	$5
Mary Doe	Base Premium	$250
Elsa Doe	Base Premium	$200
Bob Doe	Base Premium	$200
Total Premium		$905

Example 2 :

North California Based Employee John Doe a California based Employee is enrolled in to the plan along with his spouse Mary Doe, John enrolls his new born daughter Laura born on 3rd of July on 20th of July.

The following table illustrates how the premium is calculated for different members prior to new born enrollment using an age based pricing rule:

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Member	Reason	Premium Contribution
John Doe	Base Premium	$250
Mary Doe	Base Premium	$250
Total Premium		$500

With the new enrollment in the month of July, The premium for July and the following months will be recalculated, As the state of California has New Born Gift days = 30 days, the premium will be calculated as follows:

For the Month of July:

The following table illustrates how the premium is calculated and waived off for the new born using an age based pricing rule:

Member	Reason	Premium Contribution
John Doe	Base Premium	$250
Mary Doe	Base Premium	$250
Laura Doe	Base Premium	$200
	New Born Waiver	-$200
Total Premium		$500

For Month of August:

The following table illustrates how the premium is calculated for different members including the new born using an age based pricing rule:

Member	Reason	Premium Contribution
John Doe	Base Premium	$250
Mary Doe	Base Premium	$250
Laura Doe	Base Premium	$200
Total Premium		$700

Tiered Premium Pricing

Tiered based premium pricing is another methodology for premium calculation. In this methodology, Premium calculation is done by determining the **subscription tier** level for the membership directly to derive the premium amount for that membership.

Standard tier based pricing structure contains different tiers such as Employee only (E), Employee+ Spouse (ES), Family (F), Employee + Children (EC). A member can subscribe his/her dependents to a plan and fall into one of the tier. Tier-based premium varies based upon **membership tier level and different parameters**; parameters can be member's attribute or Plan level attribute or LOB specific attributes. For example, for a particular tier, pricing can vary by different population segment characteristics such as Employee Type (Retiree, COBRA and Active) and/or by different regions, Employee Status (Permanent/contractual) etc.

Like age-based pricing, tier-based pricing can be defined using pricing rule with tier-based pricing rule type You can set premium fee for set of parameters and tier level. Tier-based premium calculation algorithm which is configured in tier-

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based pricing rule type process the premium pricing for each membership based on the applicable rate for the parameters and tier value for that membership which is defined as membership characteristic.

Tier Based Pricing Example

The following table lists the premium for different customer tiers and locations or rating areas defined in a tier based pricing rule:

Tier	Location/Rating Area	Premium
Employee Only	N. California	$200
	S. California	$210
Employee + Spouse	N. California	$300
	S. California	$310
Family	N. California	$450
	S. California	$500

Example : North California Based Employee John Doe, a 45 years old smoker who enrolled himself with his spouse Mary Doe (Age 40) and daughter Elsa Doe aged 13 the premium charged will be $450 per month.

State Level Configurations

Various state specific rules are defined in ORMB using state specific characteristics e.g. Gift Days to provide no additional premium when New Born is enrolled into the plan or various rules such as maximum dependents to be covered etc. The state and state characteristics can be defined state specific parameters. These parameters which define business rules may have overridden values at Plan or Membership levels.ORMB pricing calculation always checks for the parameters at membership and plan level first, if not found then the state level parameters are considered for the price calculations.

Premium Holiday and Proration

ORMB provides several options for correctly handling of proration; when a rate changes in middle of a billing period or when new Membership is added or terminated during the bill period. Configurable Proration Rule allows to define various options such as; mid-month proration where full premium is applicable if the membership starts before mid-coverage or proration based on covered days etc.

A configuration option can be set to handle special cases where proration is not to be applied even during a long or short bill period (e.g. when a flat charge is to be applied in full; even though the billing period is half of the standard period).

ORMB allows configuring or uploading the period for which premium holiday or waive off of premium needs to be given to the membership, based on which the premium is waived off, the rate configurations allow you to provide these details on the bill lines providing the required transparency to the customer.

Self-funded Pricing

ORMB provides you with a complete solution in terms of pricing, billing and revenue management to support ASO plans and also to provide risk coverage of offering self-funded plans through the stop loss or re-insurance services.

Claim Amount Processing

ORMB provides capability to calculate the final claim amount to be charged to the customer by summing up all the claim line items configured as billable for the customer. It also provides a facility to mark up or markdown these line items amounts as per customer specific pricing.You can also define the capping amounts per claim.

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In order to support new **'Payments Integrity model'** ORMB enables you to define **the additional fees i.e. recovery fees / savings amounts** to be calculated as **flat or percentage based** on the claim charges and charge the same to the customers along with **Max / Min capping amounts**

ORMB allows you to define pricing rules, having different pricing strategy based on policy status e.g. **during the active policy period various chargeable items** like consumer driven health insurance charges, traditional health insurance charges, **are charged to the customer** whereas during **post runout period** the **entire claim amount will be written off**.

To enable easy configurations ORMB provides you a capability to define **claim templates** and with definition of multiple add-on fees and its usage with default pricing. Using a file upload utility or other custom process the claim transactions can be uploaded to ORMB.

Claim transactions contain information about the membership and details of various claim line items such as ASO **service provider charges, fee for network access, fee for non-network access, fee for collection services provided by external vendor, fee for hospital audit performed by external vendor**, and so on.

ORMB allows the ASO service provider to bill employers for claim amount and various additional fees based on the pricing defined. Claim pricing rules can be defined at the parent customer and bill group levels. Claim pricing rule enables you to define whether a particular claim line item should be billable to the customer or should be written off. Eligibility for billing can be defined based on rules using the transaction attributes.

Retention fee - Claim based

Retention fee is based upon claim amount either the percentage of claim or flat amount per claim transaction can also be calculated. ORMB provides you an ability to select the Claim line items eligible for claim based fees calculations. Claim based fees pricing can **vary based on either membership attributes or based on the claim transaction attributes** e.g. different claim based fees can be charged for claim with health coverage class as 'Medical' than that of the 'Dental'

Retention fee - Enrollment based

In order to calculate fees / premium amount / various limits (e.g. ASL Limit based on the enrollments), ORMB provides out of box pricing rule type - retention fee - enrollment based. Enrollment based pricing rules can be defined at both customer or bill group level where, enrollment fees are defined as per member or per subscriber charges where **pricing variation can be provided based on parameters e.g. coverage tier or health coverage class(HCC) etc**. It also calculates the retention fee based upon enrollment count.

Flat and Recurring Fees

Ad-hoc one time fees (e.g. one time admin fees), recurring premium fees / charges e.g. charge the stop loss premium can be defined in ORMB using the flat and recurring fees pricing rule type. These types of charges are independent of no. of enrollments or claims and are charged as a flat fee per month over a period of time. ORMB provides flexibility to set up pricing rules for charging flat / one time fees or flat recurring fees with configurable recurring frequencies e.g. claim funds.

Ancillary fees

Ancillary service charges are basically an adjustments charge which are either pre-calculated charges which need to be included into the bill or to be calculated based on the utilization of the ancillary services Ancillary pricing rule can be defined at the parent customer and bill group levels. The ancillary in ORMB enables you to create an ancillary charge in either of the following ways:

- As **pass through charge without markup or markdown** (i.e. flat charge)
- As **pass through charge** where ORMB adds a **flat or percentage based markup or markdown** to charge the customer
- Or by creating a **rate based charge** using the rate defined in the ancillary pricing and the service quantity specified in the ancillary transaction. You can also apply markup or markdown to a rate based charge

Specific Stop Loss (SSL)

SSL is the form of excess risk coverage that provides protection for the **employer against a high claim on any one individual**. ORMB provides a pricing rule type - specific stop loss to support SSL calculations. SSL pricing rules are defined at two levels - parent level defines all the accumulation specific details which are common for all the bill groups

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and bill group - policy level pricing to define the limits and also **information about which charges are to be re-insured against SSL**. ORMB provides **complete flexibility** to define the **accumulation criteria** e.g. you can choose to calculate SSL only on the medical claims, out of network claim, etc. based on configurations. Ability to calculate and invoice the specific stop loss based on per subscriber or per member basis with a **facility to laser or excludes** the **subscribers / members**. ORMB's flexible accumulation criteria definitions allow you to define SSL pricing for various types of policies -12/12 or 15/12 or 12/15 with ease. With ORMB you can choose the settlement frequency for the SSL

ORMB enables you to setup **SSL retrospectively** or **allow pricing updates by reprocessing**

Aggregated Stop Loss (ASL)

ORMB enables you to provide a **ceiling on the dollar amount of eligible expenses** that an employer would pay, **in total for all members or subscribers**, during a contract period. **ASL limit** can be configured **as either flat limit** or **based on the PSPM (Per subscriber per month) basis or enrollment based**. Similar to SSL, ASL pricing rules **enables to define eligibility rules for the transactions and claim line items** for the calculations of ASL. With ORMB you can choose the settlement frequency for the ASL. ORMB enables you to setup **ASL retrospectively** or **allow pricing updates by reprocessing**

Discount Arrangements Fees

ORMB discount arrangement pricing rule type enables to calculate and bill the discounts using two different methods - i:e: **discount share Fees** where discount amount to be charged to customer is calculated as percentage of the total discount savings amount per claim and **discount guarantee** Fees where discount amount calculated based **on discount savings amount and guaranteed percentage of the covered amount**.

Pricing Rule type allows you to define maximum discount amount that can be charged per claim transaction and/or allow to configure the **minimum and maximum discount limit on the contract level**. It also allows defining the **rule based eligibility criteria to apply discount** and exclude few transactions based upon the parameters.

Level Funding Arrangements

ORMB level funding pricing rule type allows defining the required setup for monthly contribution mechanism which can be a **fixed monthly amount** or amount based upon enrollment **count**. ORMB enables you to collect the funds during **active policy period** to settle not only the claims and other fees during active period but also to take care of the **terminal liability** or the **claims and other fees during runout period**. ORMB also provides configurable setup to define the charges to be considered for settlement with specific criteria. ORMB enables to setup pricing rules for level funding products where the **claims, ancillary, retention based fees, discounts** can be settled against the level funded amounts.

ORMB has two variations of level funding based on the method to calculate premium fund. The portal enables you to define whether the price items included in the claim, retention type claim based, retention type enrollment based, ancillary, and discount pricing rule types are eligible for level funding. If the price items are eligible for level funding, you can then include them in the level funding pricing rule type indicating that the charges for these price items will not be included in the respective billable charge (for example, claim billable charge), but it would be settled against the funds billable charge. While adjusting such charges against the funds billable charge, there might be some **surplus or deficit** in funds at the time of settlement which is ideally at the end of year. In such case, the system enables to configure whether **a flat amount or percentage of surplus should be retained** by the ASO provider or whether a flat amount or percentage of deficit is offered as a discount to the self-funded employer. It allows you for different settlement options - **Close out - where the final settlement is done**, In case the customer is continuing for the next cycle with the payer you can provide an option to **Roll Forward the surplus funds to the next years funds**.

Level Funding Arrangements

ORMB level funding pricing rule type allows defining the required setup for monthly contribution mechanism which can be a **fixed monthly amount** or amount based upon enrollment **count**. ORMB enables you to collect the funds during **active policy period** to settle not only the claims and other fees during active period but also to take care of the **terminal liability** or the **claims and other fees during runout period**. ORMB also provides configurable setup to define the charges to be considered for settlement with specific criteria. ORMB enables to setup pricing rules for level funding products where the **claims, ancillary, retention based fees, discounts** can be settled against the level funded amounts.

ORMB has two variations of level funding based on the method to calculate premium fund. The portal enables you to define whether the price items included in the claim, retention type claim based, retention type enrollment based, ancillary, and discount pricing rule types are eligible for level funding. If the price items are eligible for level funding,

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you can then include them in the level funding pricing rule type indicating that the charges for these price items will not be included in the respective billable charge (for example, claim billable charge), but it would be settled against the funds billable charge. While adjusting such charges against the funds billable charge, there might be some **surplus or deficit** in funds at the time of settlement which is ideally at the end of year. In such case, the system enables to configure whether **a flat amount or percentage of surplus should be retained** by the ASO provider or whether a flat amount or percentage of deficit is offered as a discount to the self-funded employer. It allows you for different settlement options - **Close out - where the final settlement is done**, In case the customer is continuing for the next cycle with the payer you can provide an option to **Roll Forward the surplus funds to the next years funds**.

Parameter

The pricing for a price item may differ depending upon various transaction, person, account, or product attributes. Oracle Revenue Management and Billing provides a facility to define pricing for a price item based on multiple parameters. In addition, you can define the pricing, price list, and product eligibility criteria using one or more parameters.

Each parameter must be mapped to the following:

- **Source Entity** - Indicates the entity from where the parameter value is derived. A source entity can be account, person, product, transaction, service quantity identifier, or an algorithm.
- **Source Type** - Indicates the type of source from where the parameter value is derived. A source type can be field, characteristic, usage amount, or usage counter.
- **Source Type Code** - Indicates the source (such as, field, characteristic, usage amount, usage counter, SQI, or algorithm) from where the parameter value is derived.

The system allows you to define the following types of parameters:

- **Adhoc** - Used to store an adhoc value.
- **Predefined** - Used to store a predefined value. For example, you can create a parameter named **Country** where the value type is set to **Predefined** and the following predefined values are added in the parameter:

Parameter Value	Description
AUT	Austria
AUS	Australia
CAN	Canada
CHN	China

In such case, while defining the pricing for a price item using the **Country** parameter, you can use any one of the above mentioned parameter values.

Another example, you can create a parameter named **Health Coverage Class** where the value type is set to **Predefined** and the following predefined values are added in the parameter:

Parameter Value	Description
MEDICAL	Medical
DENTAL	Dental
VISION	Vision

In such case, while defining the pricing for a price item using the **Health Coverage Class** parameter, you can use any one of the above mentioned parameter values.

- **Reference** - Used to store a value which is already present in a table. For example, you can create a parameter named **Country** where the value type is set to **Reference** and the reference entity is set to **CI_COUNTRY_L** (i.e. where

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the description of all countries is stored). In such case, while defining the pricing for a price item using the **Country** parameter, you can specify a country which is present in the **CI_COUNTRY_L** table in the parameter value.

Parameter (Used for Searching)

The **Parameter** screen allows you to search for a parameter using various search criteria. It also allows you to define a parameter. It contains the following zone:

- Search Parameter on page 752

Through this screen, you can navigate to the following screen:

- Parameter (Used for Viewing) on page 775

Search Parameter

The **Search Parameter** zone allows you to search for a parameter using various search criteria. It contains the following two sections:

- **Search Criteria** - The **Search Criteria** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Parameter	Used to search for a particular parameter.	No
Value Type	Used to search for parameters in which a particular type of value is stored. The valid values are: • Adhoc • Predefined • Reference **Note:** The list includes only those values which are defined in the **PRICE_PARM_TYPE_FLG** lookup field.	No
Source Entity	Used to search parameters whose value is derived from a particular entity. The valid values are: • Account • Algorithm • Benefit • Customer Class • Delinquency Event Type • Division • Health Plan • Health Product • Membership • Membership Person • Person • Policy • Policy Plan • Product • Service Quantity Identifier • State • Transaction	No

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The list includes only those values which are defined in the **SOURCE_ENTITY_FLG** lookup field.	
Source Type	Used to search for parameters whose value is derived from a particular type of source. The valid values are: • Characteristic • Field • Usage Amount • Usage Counter **Note:** The list includes only those values which are defined in the **SOURCE_TYPE_FLG** lookup field.	No
Description	Used to search for parameters having a particular description.	No

- **Search Results** - On clicking the **Search** button, the search results appear based on the specified search criteria. The **Search Results** section contains the following columns:

Column Name	Column Description
Parameter	Displays the parameter.
Description	Displays the description of the parameter.
Value Type	Indicates the type of value that you want to store in the parameter. The valid values are: • Adhoc • Predefined • Reference
Source Entity	Indicates the entity from where the parameter value is derived. The valid values are: • Account • Algorithm • Benefit • Customer Class • Delinquency Event Type • Division • Health Plan • Health Product • Membership • Membership Person • Person • Policy • Policy Plan • Product • Service Quantity Identifier • State • Transaction
Source Type	Indicates the type of source from where the parameter value is derived. The valid values are:

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Column Name	Column Description
	• Characteristic • Field • Usage Amount • Usage Counter
View	On clicking the **View** (🔗) icon, the **Parameter** screen appears where you can view the details of the respective parameter.
Edit	On clicking the **Edit** (✎) icon, the **Parameter** screen appears where you can edit the details of the parameter.
Delete	On clicking the **Delete** (🗑) icon, a message appears confirming whether you want to delete the parameter.
	Note: You can delete a parameter when the following conditions are met: • It is not yet associated to any price item or price item bundle. • It is not yet used while defining the pricing, price list, or pricing eligibility criteria.
Copy	On clicking the **Copy** (📋) icon corresponding to a parameter, the **Parameter** screen appears where you can define a new parameter using an existing parameter.

Note: Pagination is used to display limited number of records in the **Search Results** section. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

You can filter the list using various search criteria (such as, **Parameter**, **Value Type**, **Source Entity**, **Source Type**, and **Description**) available in the **Filter** area. You can view the **Filter** area by clicking the **Filters** (▽) icon in the upper right corner of this zone.

Related Topics

For more information on...	See...
How to search for a parameter	Searching for a Parameter on page 754
How to view the details of a parameter	Viewing the Parameter Details on page 774
How to edit a parameter	Editing a Parameter on page 761
How to delete a parameter	Deleting a Parameter on page 767
How to copy a parameter	Copying a Parameter on page 768

Searching for a Parameter

Procedure

To search for a parameter:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **P** and then click **Parameter**.
   The **Parameter** screen appears.
3. Enter the search criteria in the **Search Parameter** zone.

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> **Note:** ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.

4. Click **Search**.
   A list of parameters that meet the search criteria appears in the **Search Results** section.

Related Topics

For more information on...	See...
Parameter screen	Parameter (Used for Searching) on page 752
Search Parameter zone	Search Parameter on page 752

Defining a Parameter

Prerequisites

To define a parameter, you should have:

- Validation algorithm defined using the **C1_PPARM_VAL** algorithm type (in case you want to validate an adhoc parameter value)
- An algorithm defined using the **C1-PPARM-ENT** algorithm type (in case you want to use the algorithm while validating the pricing eligibility criteria)
- The **Fetch Type Source (C1-FetchSourceTypeVal)** business service defined in the application
- Source entities and source types defined in the application
- Value types and source type codes defined in the application

> **Note:**
>
> A sample algorithm type named **C1_PPARM_VAL** is shipped with the product. At present, it allows you to specify any special characters except ampersand (&), comma (,), underscore (_), equal to (=), tilde (~), and semi-colon(;) in the parameter value.
>
> A sample algorithm type named **C1-PPARM-ENT** is shipped with the product. At present, it returns a boolean value true. You can build custom logic in this algorithm which returns a value. This value can then be compared against the parameter value specified in the pricing eligibility criteria.

Procedure

To define a parameter:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **P** and then click **Parameter**.
   The **Parameter** screen appears.
3. Click the **Add** button available in the **Page Title** area of the **Parameter** screen.

   The **Parameter** screen appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Parameter	Used to specify the parameter.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	Note: You cannot specify any special character except underscore (_) in the parameter name.	
Source Entity	Used to indicate the source entity using which the parameter value is derived. The valid values are: • Account • Algorithm • Benefit • Customer Class • Delinquency Event Type • Division • Health Plan **Note:** This option is not applicable for the banking business. • Health Product **Note:** This option is not applicable for the banking business. • Membership **Note:** This option is not applicable for the banking business. • Membership Person **Note:** This option is not applicable for the banking business. • Person • Policy • Policy Plan **Note:** This option is not applicable for the banking business. • Product **Note:** This option is not applicable for the health insurance business. • Service Quantity Identifier • State • Transaction **Note:** The list includes only those values which are defined in the**SOURCE_ENTITY_FLG** lookup field.	Yes
Description	Used to specify the description for the parameter.	Yes
Source Type	Used to indicate the source type using which the parameter value is derived. The valid values are: • Characteristic • Field • Usage Amount • Usage Counter	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	Note: This field appears when the **Account**, **Person**, **Benefit**, **Health Plan**, **Health Product**, **Membership**, **Membership Person**, **Person**, **Policy**, **Policy Plan**, **Product**, or **State** option is selected from the **Source Entity** list. The **Usage Amount** and **Usage Counter** options do not appear in the **Source Type** list when the **Benefit**, **Health Plan**, **Health Product**, **Membership**, **Membership Person**, **Policy**, **Policy Plan**, **Product**, or **State** option is selected from the **Source Entity** list. This is a read-only field. By default, the **Field** option is selected when the **Customer Class**, **Delinquency Event Type**, and **Division** option is selected from the **Source Entity** list. The list includes only those values which are defined in the **SOURCE_TYPE_FLG** lookup field.	
Value Type	Used to indicate the type of value that you want to store in the parameter. The valid values are: • Adhoc • Predefined • Reference **Note:** The list includes only those values which are defined in the **PRICE_PARM_TYPE_FLG** lookup field.	Yes
Source Type Code	Used to indicate the source type code using which the parameter value is derived.	Yes

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<table>
<tr><th>Field Name</th><th>Field Description</th><th>Mandatory (Yes or No)</th></tr>
<tr><td></td><td>
Note:
This field does not appear when the Transaction option is selected from the Source Entity list.
The following table indicates the values that are listed in the Source Type Code field depending on the source entity and source type combination:
<table>
<tr><th>Source Entity</th><th>Source Type</th><th>Source Type Code</th></tr>
<tr><td>Account</td><td>Characteristic</td><td>Lists all characteristics where the characteristic entity is set to Account.</td></tr>
<tr><td>Account</td><td>Field</td><td>Lists all fields of the CI_ACCT table.</td></tr>
<tr><td>Account</td><td>Usage Amount</td><td>The list includes only those values which are defined in the BAL_FLG lookup field.</td></tr>
<tr><td>Account</td><td>Usage Counter</td><td>The list includes only those values which are defined in the CNT_FLG lookup field.</td></tr>
<tr><td>Algorithm</td><td>-</td><td>Lists all algorithms which are defined using the C1-PPARM-ENT algorithm type.</td></tr>
<tr><td>Benefit</td><td>Characteristic</td><td>Lists all characteristics where the characteristic entity is set to Benefit.</td></tr>
<tr><td>Benefit</td><td>Field</td><td>Lists all fields of the C1_BENEFITS table.</td></tr>
<tr><td>Customer Class</td><td>Field</td><td>By default, the Customer Class option is selected.
Note: This is a read-only field.</td></tr>
<tr><td>Delinquency Event Type</td><td>Field</td><td>Lists all fields of the CI_MD_TBL_FLD table.</td></tr>
<tr><td>Division</td><td>Field</td><td>By default, the Division option is selected.
Note: This is a read-only field.</td></tr>
<tr><td>Health Plan</td><td>Characteristic</td><td>Lists all characteristics where the characteristic entity is set to Health Plan.
Note: This option is not applicable for the banking business.</td></tr>
</table>
</td><td></td></tr>
</table>

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Field Name	Field Description	Mandatory (Yes or No)
Validation Algorithm	Used to indicate the algorithm using which you want to validate the adhoc parameter value. **Note:** This field appears when the **Adhoc** option is selected from the **Value Type** list. The **Search** (🔍) icon appears corresponding to the **Validation Algorithm** field. On clicking the **Search** icon, the **Algorithm Search** window appears. On specifying the algorithm, the description of the algorithm appears corresponding to the **Validation Algorithm** field.	No
Reference Entity	Used to indicate the reference table whose primary key (column) you want to set as the reference entity. **Note:** This field appears only when the **Reference** option is selected from the **Value Type** list. The **Search** (🔍) icon appears corresponding to the **Reference Entity** field. On clicking the **Search** icon, the **Reference Table Search** window appears. On specifying the entity, the description of the entity appears corresponding to the **Reference Entity** field. You can only specify a language table, where the **DESCR** column is available, in the **Reference Entity** field.	Yes

In addition, this screen contains the following two sections:

- **Parameter Values** - Used to define the predefined values for the parameter. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Parameter Values	Used to specify the value for the parameter. **Note:** You can specify any special characters except ampersand (&), comma (,), underscore (_), equal to (=), tilde (~), and semi-colon(;) in the predefined parameter value.	Yes (Conditional) **Note:** This field is required while defining the predefined parameter values.
Description	Used to specify the description for the parameter value.	Yes (Conditional) **Note:** This field is required while defining the predefined parameter values.

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Note:

The **Parameter Values** section appears only when the **Predefined** option is selected from the **Value Type** list. At least one parameter value should be defined for a parameter where the value type is set to **Predefined**.

If you want to define more than one predefined value for the parameter, click the **Add** (+) icon and then specify the details.

However, if you want to remove a predefined value from the parameter, click the **Delete** (🗑) icon corresponding to the parameter value.

- **Parameter Usage** - Used to indicate where you want to use the parameter in the system. It contains the following options:

Option Name	Option Description	Mandatory (Yes or No)
Price Item	Used to indicate whether the parameter is associated with a price item or price item bundle. If the parameter is associated with a price item or price item bundle, you can use the parameter while defining the price item pricing. **Note:** This option appears when the **Account**, **Person**, **Product**, **State**, or the **Transaction** option is selected from the **Source Entity** list. By default, this option is selected when the **Transaction** option is selected from the **Source Entity** list.	Yes (Conditional) **Note:** This option is required while associating the parameter with a price item.
Pricing Eligibility Criteria	Used to indicate whether the parameter is used for defining the pricing eligibility criteria. **Note:** This option appears when the **Account**, **Algorithm**, **Membership**, **Membership Person**, **Person**, **Product**, **Service Quantity Identifier**, or the **State** option is selected from the **Source Entity** list.	Yes (Conditional) **Note:** This option is required while defining a pricing eligibility criteria using the parameter.
Pricing Rule Eligibility Criteria	Used to indicate whether the parameter is used for defining the pricing rule eligibility criteria. **Note:** This option appears only when the **Membership** or the **Membership Person** option is selected from the **Source Entity** list.	Yes (Conditional) **Note:** This option is required while using the parameter for defining a rule based pricing eligibility criteria.
Business Rule Eligibility Criteria	Used to indicate whether the parameter is used for defining the business rule eligibility criteria. **Note:** This option appears only when the **Account**, **Algorithm**, **Customer Class**, **Delinquency Event Type**, **Division**, **Health Plan**, **Health Product**, **Membership**, **Membership Person**, **Policy**, or the **Policy Plan** option is selected from the **Source Entity** list.	Yes (Conditional) **Note:** This option is required while using the parameter for defining a rule based business eligibility criteria.

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Option Name	Option Description	Mandatory (Yes or No)
Price List Eligibility Criteria	Used to indicate whether the parameter is used for defining the price list eligibility criteria. **Note:** This option appears only when the **Account**, **Algorithm**, **Person**, **Product**, **Service Quantity Identifier**, or the **State** option is selected from the **Source Entity** list.	Yes (Conditional) **Note:** This option is required while defining a price list eligibility criteria using the parameter.
Product Eligibility Criteria	Used to indicate whether the parameter is used for defining the product eligibility criteria. **Note:** This option appears only when the **Account**, **Person**, **Product**, or the **State** option is selected from the **Source Entity** list.	Yes (Conditional) **Note:** This option is required while defining a product eligibility criteria using the parameter.
Rule Eligibility Criteria	Used to indicate whether the parameter is used for defining the rule eligibility criteria. **Note:** This option does not appear when the **Customer Class**, **Delinquency Event Type**, **Division Product**, **Service Quantity Identifier**, or the **Transaction** option is selected from the **Source Entity** list.	Yes (Conditional) **Note:** This option is required while defining a rule eligibility criteria using the parameter.

Note: You must select at least one option in the **Parameter Usage** section.

4. Enter the required details in the **Parameter** screen.
5. Click **Save**.
   The parameter is defined.

Note: If a parameter is already defined using the source entity, source type, and source type code combination, the system will not allow you to define another parameter with the same combination.

Related Topics

For more information on...	See...
Parameter screen	Parameter (Used for Searching) on page 752

Editing a Parameter

Prerequisites

To edit a parameter, you should have:

- Validation algorithm defined using the **C1_PPARM_VAL** algorithm type (in case you want to validate an adhoc parameter value)
- An algorithm defined using the **C1-PPARM-ENT** algorithm type (in case you want to use the algorithm while validating the pricing eligibility criteria)
- The **Fetch Type Source (C1-FetchSourceTypeVal)** business service defined in the application
- Source entities and source types defined in the application
- Source type codes defined in the application

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Note:

A sample algorithm type named **C1_PPARM_VAL** is shipped with the product. At present, it allows you to specify any special characters except ampersand (&), comma (,), underscore (_), equal to (=), tilde (~), and semi-colon(;) in the parameter value.

A sample algorithm type named **C1-PPARM-ENT** is shipped with the product. At present, it returns a boolean value true. You can build custom logic in this algorithm which returns a value. This value can then be compared against the parameter value specified in the pricing eligibility criteria.

Procedure

To edit a parameter:

1. Search for the parameter in the **Parameter** screen.
2. In the **Search Results** section, click the **Edit** (✎) icon in the **Edit** column corresponding to the parameter *w*hose details you want to edit.

   The **Parameter** screen appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Parameter	Displays the parameter. **Note:** This is a read-only field.	Not applicable
Source Entity	Used to indicate the source entity using which the parameter value is derived. The valid values are: • Account • Algorithm • Benefit • Customer Class • Delinquency Event Type • Division • Health Plan **Note:** This option is not applicable for the banking business. • Health Product **Note:** This option is not applicable for the banking business. • Membership **Note:** This option is not applicable for the banking business. • Membership Person **Note:** This option is not applicable for the banking business. • Person • Policy • Policy Plan **Note:** This option is not applicable for the banking business. • Product	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	Note: This option is not applicable for the health insurance business. • Service Quantity Identifier • State • Transaction **Note:** The list includes only those values which are defined in the**SOURCE_ENTITY_FLG** lookup field.	
Description	Used to specify the description for the parameter.	Yes
Source Type	Used to indicate the source type using which the parameter value is derived. The valid values are: • Characteristic • Field • Usage Amount • Usage Counter **Note:** This field appears when the **Account**, **Person**, **Benefit**, **Health Plan**, **Health Product**, **Membership**, **Membership Person**, **Person**, **Policy**, **Policy Plan**, **Product**, or **State** option is selected from the **Source Entity** list. The **Usage Amount** and **Usage Counter** options do not appear in the **Source Type** list when the **Benefit**, **Health Plan**, **Health Product**, **Membership**, **Membership Person**, **Policy**, **Policy Plan**, **Product**, or **State** option is selected from the **Source Entity** list. This is a read-only field. By default, the **Field** option is selected when the **Customer Class**, **Delinquency Event Type**, and **Division** option is selected from the **Source Entity** list. The list includes only those values which are defined in the **SOURCE_TYPE_FLG** lookup field.	Yes
Value Type	Used to indicate the type of value that you want to store in the parameter. The valid values are: • Adhoc • Predefined • Reference **Note:** The list includes only those values which are defined in the **PRICE_PARM_TYPE_FLG** lookup field.	Not applicable
Source Type Code	Used to indicate the source type code using which the parameter value is derived.	Yes

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<table>
<tr><th>Field Name</th><th>Field Description</th><th>Mandatory (Yes or No)</th></tr>
<tr><td></td><td>
Note:
This field does not appear when the Transaction option is selected from the Source Entity list.
The following table indicates the values that are listed in the Source Type Code field depending on the source entity and source type combination:
<table>
<tr><th>Source Entity</th><th>Source Type</th><th>Source Type Code</th></tr>
<tr><td>Account</td><td>Characteristic</td><td>Lists all characteristics where the characteristic entity is set to Account.</td></tr>
<tr><td>Account</td><td>Field</td><td>Lists all fields of the CI_ACCT table.</td></tr>
<tr><td>Account</td><td>Usage Amount</td><td>The list includes only those values which are defined in the BAL_FLG lookup field.</td></tr>
<tr><td>Account</td><td>Usage Counter</td><td>The list includes only those values which are defined in the CNT_FLG lookup field.</td></tr>
<tr><td>Algorithm</td><td>-</td><td>Lists all algorithms which are defined using the C1-PPARM-ENT algorithm type.</td></tr>
<tr><td>Benefit</td><td>Characteristic</td><td>Lists all characteristics where the characteristic entity is set to Benefit.</td></tr>
<tr><td>Benefit</td><td>Field</td><td>Lists all fields of the C1_BENEFITS table.</td></tr>
<tr><td>Customer Class</td><td>Field</td><td>By default, the Customer Class option is selected.
Note: This is a read-only field.</td></tr>
<tr><td>Delinquency Event Type</td><td>Field</td><td>Lists all fields of the CI_MD_TBL_FLD table.</td></tr>
<tr><td>Division</td><td>Field</td><td>By default, the Division option is selected.
Note: This is a read-only field.</td></tr>
<tr><td>Health Plan</td><td>Characteristic</td><td>Lists all characteristics where the characteristic entity is set to Health Plan.
Note: This option is not applicable for the banking business.</td></tr>
<tr><td>Health Plan</td><td>Field</td><td>Lists all the fields of the C1_HEALTH_PLAN</td></tr>
</table>
</td><td></td></tr>
</table>

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Field Name	Field Description	Mandatory (Yes or No)
Validation Algorithm	Used to indicate the algorithm using which you want to validate the adhoc parameter value. **Note:** This field appears when the **Adhoc** option is selected from the **Value Type** list. The **Search** (🔍) icon appears corresponding to the **Validation Algorithm** field. On clicking the **Search** icon, the **Algorithm Search** window appears. On specifying the algorithm, the description of the algorithm appears corresponding to the **Validation Algorithm** field.	No
Reference Entity	Used to indicate the reference table whose primary key (column) you want to set as the reference entity. **Note:** This field appears only when the **Reference** option is selected from the **Value Type** list. The **Search** (🔍) icon appears corresponding to the **Reference Entity** field. On clicking the **Search** icon, the **Reference Table Search** window appears. On specifying the entity, the description of the entity appears corresponding to the **Reference Entity** field. You can only specify a language table, where the **DESCR** column is available, in the **Reference Entity** field.	Yes

In addition, this screen contains the following two sections:

- **Parameter Values** - Used to define the predefined values for the parameter. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Parameter Values	Used to specify the value for the parameter. **Note:** You can specify any special characters except ampersand (&), comma (,), underscore (_), equal to (=), tilde (~), and semi-colon(;) in the predefined parameter value.	Yes (Conditional) **Note:** This field is required while defining the predefined parameter values.
Description	Used to specify the description for the parameter value.	Yes (Conditional) **Note:** This field is required while defining the predefined parameter values.

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Note:

The **Parameter Values** section appears only when the **Predefined** option is selected from the **Value Type** list. At least one parameter value should be defined for a parameter where the value type is set to **Predefined**.

If you want to define more than one predefined value for the parameter, click the **Add** (+) icon and then specify the details.

However, if you want to remove a predefined value from the parameter, click the **Delete** (🗑) icon corresponding to the parameter value.

- **Parameter Usage** - Used to indicate where you want to use the parameter in the system. It contains the following options:

Option Name	Option Description	Mandatory (Yes or No)
Price Item	Used to indicate whether the parameter is associated with a price item or price item bundle. If the parameter is associated with a price item or price item bundle, you can use the parameter while defining the price item pricing. **Note:** This option appears when the **Account**, **Person**, **Product**, **State**, or the **Transaction** option is selected from the **Source Entity** list. By default, this option is selected when the **Transaction** option is selected from the **Source Entity** list.	Yes (Conditional) **Note:** This option is required while associating the parameter with a price item.
Pricing Eligibility Criteria	Used to indicate whether the parameter is used for defining the pricing eligibility criteria. **Note:** This option appears when the **Account**, **Algorithm**, **Membership**, **Membership Person**, **Person**, **Product**, **Service Quantity Identifier**, or the **State** option is selected from the **Source Entity** list.	Yes (Conditional) **Note:** This option is required while defining a pricing eligibility criteria using the parameter.
Pricing Rule Eligibility Criteria	Used to indicate whether the parameter is used for defining the pricing rule eligibility criteria. **Note:** This option appears only when the **Membership** or the **Membership Person** option is selected from the **Source Entity** list.	Yes (Conditional) **Note:** This option is required while using the parameter for defining a rule based pricing eligibility criteria.
Business Rule Eligibility Criteria	Used to indicate whether the parameter is used for defining the business rule eligibility criteria. **Note:** This option appears only when the **Account**, **Algorithm**, **Customer Class**, **Delinquency Event Type**, **Division**, **Health Plan**, **Health Product**, **Membership**, **Membership Person**, **Policy**, or the **Policy Plan** option is selected from the **Source Entity** list.	Yes (Conditional) **Note:** This option is required while using the parameter for defining a rule based business eligibility criteria.
Price List Eligibility Criteria	Used to indicate whether the parameter is used for defining the price list eligibility criteria.	Yes (Conditional)

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Option Name	Option Description	Mandatory (Yes or No)
	Note: This option appears only when the **Account**, **Algorithm**, **Person**, **Product**, **Service Quantity Identifier**, or the **State** option is selected from the **Source Entity** list.	**Note:** This option is required while defining a price list eligibility criteria using the parameter.
Product Eligibility Criteria	Used to indicate whether the parameter is used for defining the product eligibility criteria.	Yes (Conditional)
	Note: This option appears only when the **Account**, **Person**, **Product**, or the **State** option is selected from the **Source Entity** list.	**Note:** This option is required while defining a product eligibility criteria using the parameter.
Rule Eligibility Criteria	Used to indicate whether the parameter is used for defining the rule eligibility criteria.	Yes (Conditional)
	Note: This option does not appear when the **Customer Class**, **Delinquency Event Type**, **Division Product**, **Service Quantity Identifier**, or the **Transaction** option is selected from the **Source Entity** list.	**Note:** This option is required while defining a rule eligibility criteria using the parameter.

Note: You must select at least one option in the **Parameter Usage** section.

3. Modify the required details in the **Parameter** screen.
4. Click **Save**.
   The changes made to the parameter are saved.

Related Topics

For more information on...	See...
How to search for a parameter	Searching for a Parameter on page 754
Parameter screen	Parameter (Used for Searching) on page 752

Deleting a Parameter

Procedure

To delete a parameter:

1. Search for the parameter in the **Parameter** screen.
2. In the **Search Results** section, click the **Delete** (🗑) icon in the **Delete** column corresponding to the *p*arameter that you want to delete.

   A message appears confirming whether you want to delete the parameter.

Note:

You can delete a parameter only when the following conditions are met:

- It is not yet associated to any price item or price item bundle.
- It is not yet used while defining the pricing, business rule, price list, product eligibility, or rule eligibility criteria.

3. Click **OK**.

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The parameter is deleted.

Related Topics

For more information on...	See...
How to search for a parameter	Searching for a Parameter on page 754
Parameter screen	Parameter (Used for Searching) on page 752

Copying a Parameter

Instead of creating a parameter from scratch, you can define a new parameter using an existing parameter. This is possible through copying a parameter. On copying a parameter, the details including the predefined values, validation algorithm, and reference entity (depending upon the value type) are copied to the new parameter along with the parameter usage details. You can then edit the details, if required.

Prerequisites

To copy a parameter, you should have:

- Parameter (whose copy you want to create) defined in the application
- Validation algorithm defined using the **C1_PPARM_VAL** algorithm type (in case you want to validate an adhoc parameter value)
- An algorithm defined using the **C1-PPARM-ENT** algorithm type (in case you want to use the algorithm while validating the pricing eligibility criteria)
- The **Fetch Type Source (C1-FetchSourceTypeVal)** business service defined in the application.
- Source entities and source types defined in the application
- Source type codes defined in the application

Note:

A sample algorithm type named **C1_PPARM_VAL** is shipped with the product. At present, it allows you to specify any special characters except ampersand (&), comma (,), underscore (_), equal to (=), tilde (~), and semi-colon(;) in the parameter value.

A sample algorithm type named **C1-PPARM-ENT** is shipped with the product. At present, it returns a boolean value true. You can build custom logic in this algorithm which returns a value. This value can then be compared against the parameter value specified in the pricing eligibility criteria.

Procedure

To copy a parameter:

1. Search for the parameter in the **Parameter** screen.
2. In the **Search Results** section, click the **Copy** (⧉) icon in the **Copy** column corresponding to the parameter whose copy you want to create.

   The **Parameter** screen appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Parameter	Used to specify the parameter. **Note:** You cannot specify any special character except underscore (_) in the parameter name.	Not applicable
Source Entity	Used to indicate the source entity using which the parameter value is derived. The valid values are:	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	• Account • Algorithm • Benefit • Customer Class • Delinquency Event Type • Division • Health Plan **Note:** This option is not applicable for the banking business. • Health Product **Note:** This option is not applicable for the banking business. • Membership **Note:** This option is not applicable for the banking business. • Membership Person **Note:** This option is not applicable for the banking business. • Person • Policy • Policy Plan **Note:** This option is not applicable for the banking business. • Product **Note:** This option is not applicable for the health insurance business. • Service Quantity Identifier • State • Transaction **Note:** The list includes only those values which are defined in the**SOURCE_ENTITY_FLG** lookup field.	
Description	Used to specify the description for the parameter.	Yes
Source Type	Used to indicate the source type using which the parameter value is derived. The valid values are: • Characteristic • Field • Usage Amount • Usage Counter	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	Note: This field appears when the **Account**, **Person**, **Benefit**, **Health Plan**, **Health Product**, **Membership**, **Membership Person**, **Person**, **Policy**, **Policy Plan**, **Product**, or **State** option is selected from the **Source Entity** list. The **Usage Amount** and **Usage Counter** options do not appear in the **Source Type** list when the **Benefit**, **Health Plan**, **Health Product**, **Membership**, **Membership Person**, **Policy**, **Policy Plan**, **Product**, or **State** option is selected from the **Source Entity** list. This is a read-only field. By default, the **Field** option is selected when the **Customer Class**, **Delinquency Event Type**, and **Division** option is selected from the **Source Entity** list. The list includes only those values which are defined in the **SOURCE_TYPE_FLG** lookup field.	
Value Type	Used to indicate the type of value that you want to store in the parameter. The valid values are: • Adhoc • Predefined • Reference **Note:** The list includes only those values which are defined in the **PRICE_PARM_TYPE_FLG** lookup field.	Not applicable
Source Type Code	Used to indicate the source type code using which the parameter value is derived.	Yes

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<table>
<tr><th>Field Name</th><th>Field Description</th><th>Mandatory (Yes or No)</th></tr>
<tr><td></td><td>
Note:
This field does not appear when the Transaction option is selected from the Source Entity list.
The following table indicates the values that are listed in the Source Type Code field depending on the source entity and source type combination:
<table>
<tr><th>Source Entity</th><th>Source Type</th><th>Source Type Code</th></tr>
<tr><td>Account</td><td>Characteristic</td><td>Lists all characteristics where the characteristic entity is set to Account.</td></tr>
<tr><td>Account</td><td>Field</td><td>Lists all fields of the CI_ACCT table.</td></tr>
<tr><td>Account</td><td>Usage Amount</td><td>The list includes only those values which are defined in the BAL_FLG lookup field.</td></tr>
<tr><td>Account</td><td>Usage Counter</td><td>The list includes only those values which are defined in the CNT_FLG lookup field.</td></tr>
<tr><td>Algorithm</td><td>-</td><td>Lists all algorithms which are defined using the C1-PPARM-ENT algorithm type.</td></tr>
<tr><td>Benefit</td><td>Characteristic</td><td>Lists all characteristics where the characteristic entity is set to Benefit.</td></tr>
<tr><td>Benefit</td><td>Field</td><td>Lists all fields of the C1_BENEFITS table.</td></tr>
<tr><td>Customer Class</td><td>Field</td><td>By default, the Customer Class option is selected.
Note: This is a read-only field.</td></tr>
<tr><td>Delinquency Event Type</td><td>Field</td><td>Lists all fields of the CI_MD_TBL_FLD table.</td></tr>
<tr><td>Division</td><td>Field</td><td>By default, the Division option is selected.
Note: This is a read-only field.</td></tr>
<tr><td>Health Plan</td><td>Characteristic</td><td>Lists all characteristics where the characteristic entity is set to Health Plan.
Note: This option is not applicable for the banking business.</td></tr>
<tr><td>Health Plan</td><td>Field</td><td>Lists all the fields of the C1_HEALTH_PLAN</td></tr>
</table>
</td><td></td></tr>
</table>

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Field Name	Field Description	Mandatory (Yes or No)
Validation Algorithm	Used to indicate the algorithm using which you want to validate the adhoc parameter value. **Note:** This field appears when the **Adhoc** option is selected from the **Value Type** list. The **Search** (🔍) icon appears corresponding to the **Validation Algorithm** field. On clicking the **Search** icon, the **Algorithm Search** window appears. On specifying the algorithm, the description of the algorithm appears corresponding to the **Validation Algorithm** field.	No
Reference Entity	Used to indicate the reference table whose primary key (column) you want to set as the reference entity. **Note:** This field appears only when the **Reference** option is selected from the **Value Type** list. The **Search** (🔍) icon appears corresponding to the **Reference Entity** field. On clicking the **Search** icon, the **Reference Table Search** window appears. On specifying the entity, the description of the entity appears corresponding to the **Reference Entity** field. You can only specify a language table, where the **DESCR** column is available, in the **Reference Entity** field.	Yes

In addition, this screen contains the following two sections:

- **Parameter Values** - Used to define the predefined values for the parameter. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Parameter Values	Used to specify the value for the parameter. **Note:** You can specify any special characters except ampersand (&), comma (,), underscore (_), equal to (=), tilde (~), and semi-colon(;) in the predefined parameter value.	Yes (Conditional) **Note:** This field is required while defining the predefined parameter values.
Description	Used to specify the description for the parameter value.	Yes (Conditional) **Note:** This field is required while defining the predefined parameter values.

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Note:

The **Parameter Values** section appears only when the **Predefined** option is selected from the **Value Type** list. At least one parameter value should be defined for a parameter where the value type is set to **Predefined**.

If you want to define more than one predefined value for the parameter, click the **Add** (+) icon and then specify the details.

However, if you want to remove a predefined value from the parameter, click the **Delete** (🗑) icon corresponding to the parameter value.

- **Parameter Usage** - Used to indicate where you want to use the parameter in the system. It contains the following options:

Option Name	Option Description	Mandatory (Yes or No)
Price Item	Used to indicate whether the parameter is associated with a price item or price item bundle. If the parameter is associated with a price item or price item bundle, you can use the parameter while defining the price item pricing. **Note:** This option appears when the **Account**, **Person**, **Product**, **State**, or the **Transaction** option is selected from the **Source Entity** list. By default, this option is selected when the **Transaction** option is selected from the **Source Entity** list.	Yes (Conditional) **Note:** This option is required while associating the parameter with a price item.
Pricing Eligibility Criteria	Used to indicate whether the parameter is used for defining the pricing eligibility criteria. **Note:** This option appears when the **Account**, **Algorithm**, **Membership**, **Membership Person**, **Person**, **Product**, **Service Quantity Identifier**, or the **State** option is selected from the **Source Entity** list.	Yes (Conditional) **Note:** This option is required while defining a pricing eligibility criteria using the parameter.
Pricing Rule Eligibility Criteria	Used to indicate whether the parameter is used for defining the pricing rule eligibility criteria. **Note:** This option appears only when the **Membership** or the **Membership Person** option is selected from the **Source Entity** list.	Yes (Conditional) **Note:** This option is required while using the parameter for defining a rule based pricing eligibility criteria.
Business Rule Eligibility Criteria	Used to indicate whether the parameter is used for defining the business rule eligibility criteria. **Note:** This option appears only when the **Account**, **Algorithm**, **Customer Class**, **Delinquency Event Type**, **Division**, **Health Plan**, **Health Product**, **Membership**, **Membership Person**, **Policy**, or the **Policy Plan** option is selected from the **Source Entity** list.	Yes (Conditional) **Note:** This option is required while using the parameter for defining a rule based business eligibility criteria.

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Option Name	Option Description	Mandatory (Yes or No)
Price List Eligibility Criteria	Used to indicate whether the parameter is used for defining the price list eligibility criteria. **Note:** This option appears only when the **Account**, **Algorithm**, **Person**, **Product**, **Service Quantity Identifier**, or the **State** option is selected from the **Source Entity** list.	Yes (Conditional) **Note:** This option is required while defining a price list eligibility criteria using the parameter.
Product Eligibility Criteria	Used to indicate whether the parameter is used for defining the product eligibility criteria. **Note:** This option appears only when the **Account**, **Person**, **Product**, or the **State** option is selected from the **Source Entity** list.	Yes (Conditional) **Note:** This option is required while defining a product eligibility criteria using the parameter.
Rule Eligibility Criteria	Used to indicate whether the parameter is used for defining the rule eligibility criteria. **Note:** This option does not appear when the **Customer Class**, **Delinquency Event Type**, **Division Product**, **Service Quantity Identifier**, or the **Transaction** option is selected from the **Source Entity** list.	Yes (Conditional) **Note:** This option is required while defining a rule eligibility criteria using the parameter.

Note: You must select at least one option in the **Parameter Usage** section.

3. Enter the required details in the **Parameter** screen.
4. Click **Save**.
   The new parameter is defined.

Note: If a parameter is already defined using the source entity, source type, and source type code combination, the system will not allow you to define another parameter with the same combination.

Related Topics

For more information on...	See...
How to search for a parameter	Searching for a Parameter on page 754
Parameter screen	Parameter (Used for Searching) on page 752

Viewing the Parameter Details

Procedure

To view the details of a parameter:

1. Search for the parameter in the **Parameter** screen.
2. In the **Search Results** section, click the **View** (🔗) icon in the **View** column corresponding to the parameter *w*hose details you want to view.
   The **Parameter** screen appears.
3. View the details of the parameter in the **Parameter** zone.

Related Topics

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For more information on...	See...
How to search for a parameter	Searching for a Parameter on page 754
Parameter screen	Parameter (Used for Viewing) on page 775
Parameter zone	Parameters on page 821

Parameter (Used for Viewing)

Once you create a parameter, the **Parameter** screen allows you to:

- View the details of the parameter

This screen consists of the following zone:

- Parameter on page 775

Parameter

The **Parameter** zone displays the details of the parameter. It contains the following sections:

- **Main** - Displays the basic information about the parameter. It contains the following fields:

Field Name	Field Description
Parameter	Displays the parameter name.
Description	Displays the description of the parameter.
Value Type	Indicates the type of value that you want to store in the parameter. The valid values are: • Adhoc • Predefined • Reference
Validation Algorithm	Indicates the algorithm using which you want to validate the adhoc parameter value. **Note:** This field appears when the **Adhoc** option is selected from the **Value Type** list. It has a link. On clicking the link, the **Algorithm** screen appears where you can view the details of the respective algorithm.
Referenced Table	Indicates the reference table whose primary key (i.e. column) is used to validate the parameter value. **Note:** This field appears when the **Reference** option is selected from the **Value Type** list. It has a link. On clicking the link, the **Table** screen appears where you can view the details of the respective table.
Source Entity	Indicates the source entity using which the parameter value is derived. The valid values are: • Account

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Field Name	Field Description
	• Algorithm • Benefit • Customer Class • Delinquency Event Type • Division • Health Plan **Note:** This option is not applicable for the banking business. • Health Product **Note:** This option is not applicable for the banking business. • Membership **Note:** This option is not applicable for the banking business. • Membership Person **Note:** This option is not applicable for the banking business. • Person • Policy • Policy Plan **Note:** This option is not applicable for the banking business. • Product **Note:** This option is not applicable for the health insurance business. • Service Quantity Identifier • State • Transaction
Source Type	Indicates the source type using which the parameter value is derived. The valid values are: • Characteristic • Field • Usage Amount • Usage Counter
	Note: This field appears when the **Account**, **Person**, **Benefit**, **Health Plan**, **Health Product**, **Membership**, **Membership Person**, **Person**, **Policy**, **Policy Plan**, **Product**, or **State** option is selected from the **Source Entity** list. The **Usage Amount** and **Usage Counter** options do not appear in the **Source Type** list when the **Benefit**, **Health Plan**, **Health Product**, **Membership**, **Membership Person**, **Policy**, **Policy Plan**, **Product**, or **State** option is selected from the **Source Entity** list.
Source Type Code	Used to indicate the source type code using which the parameter value is derived.
	Note: This field does not appear when the **Transaction** option is selected from the **Source Entity** list.

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- **Parameter Values** - Lists the predefined values of the parameter. It contains the following columns:

Column Name	Column Description
Parameter Value	Displays the value of the parameter.
Description	Displays the description of the parameter value.

Note: The **Parameter Values** section appears when the **Predefined** option is selected from the **Value Type** list.

- **Parameter Usage** - Indicates where you can use the parameter in the system. It contains the following options:

Option Name	Option Description
Price Item	Indicates whether the parameter is associated with a price item or price item bundle. If a parameter is associated with a price item or price item bundle, you can use the parameter while defining the price item pricing.
	Note: This option appears when the **Account**, **Person**, **Product**, **State**, or the **Transaction** option is selected from the **Source Entity** list.
Pricing Eligibility Criteria	Indicates whether the parameter is used for defining the pricing eligibility criteria.
	Note: This option appears when the **Account**, **Algorithm**, **Membership**, **Membership Person**, **Person**, **Product**, **Service Quantity Identifier**, or the **State** option is selected from the **Source Entity** list.
Pricing Rule Eligibility Criteria	Indicates whether the parameter is used for defining the pricing rule eligibility criteria.
	Note: This option appears only when the **Membership** or the **Membership Person** option is selected from the **Source Entity** list.
Business Rule Eligibility Criteria	Indicates whether the parameter is used for defining the business rule eligibility criteria.
	Note: This option appears only when the **Account**, **Algorithm**, **Customer Class**, **Delinquency Event Type**, **Division**, **Health Plan**, **Health Product**, **Membership**, **Membership Person**, **Policy**, or the **Policy Plan** option is selected from the **Source Entity** list.
Price List Eligibility Criteria	Indicates whether the parameter is used for defining the price list eligibility criteria.
	Note: This option appears only when the **Account**, **Algorithm**, **Person**, **Product**, **Service Quantity Identifier**, or the **State** option is selected from the **Source Entity** list.
Product Eligibility Criteria	Indicates whether the parameter is used for defining the product eligibility criteria.
	Note: This option appears only when the **Account**, **Person**, **Product**, or the **State** option is selected from the **Source Entity** list.
Rule Eligibility Criteria	Indicates whether the parameter is used for defining the rule eligibility criteria.
	Note: This option does not appear when the **Customer Class**, **Delinquency Event Type**, **Division Product**, **Service Quantity Identifier**, or the **Transaction** option is selected from the **Source Entity** list.

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Related Topics

For more information on...	See...
Parameter screen	Parameter (Used for Viewing) on page 775

Price Item (Health Insurance Business)

The various charges that are to be charged to the customer (for example, premium or optional administration fees to a fully-insured group customer and claim based fees or enrollment based fees to a self-funded customer) are defined as price items in the system. Similarly, various charges credited to the customer are also defined as price items. Stop-loss arrangements for a self-funded customer (for example, specific stop-loss that is calculated and credited to customer) is represented using a price item in the system.

Once you define a price item, you can also define the pricing for the price item at various levels using pricing rules based on the requirements. For a fully-insured group customer, the pricing is defined at the policy plan level. Whereas, for a self-funded customer, the pricing can be defined either at the bill group policy level or at the parent customer level. For more information about the fully-insured pricing, see Fully-Insured Pricing on page 3367. And, for more information about the self-funded pricing, see Self-Funded Pricing on page 2869.

The system enables you to create price items which can be used for pricing and billing. It means that pricing can be defined for the price item and charges can be created against it in the system. The system enables you to create the following type of price items:

- **Fees Based Price Items** - The fees based services would include services on which fees is charged to the customers either annually or at regular intervals (for example, for the administrative services offered to the self-funded customer, the admin fees will be charged). You can create fees based price items which can be used for pricing and billing in the system.

You need to associate a contract type with a price item. The system allows you to create a charge (i.e. billable charge) for a price item on an account when a contract of the contract type which is associated with the price item is already present on the account.

You can create price items which can be assigned to any price list except global price list or which can assigned to only global price lists. For more information about global price list, see Price List on page 836.

You can associate one or more parameters where the parameter usage is set to **Price Item** with a price item. These parameters can then be used for:

- Aggregating transactions which are mapped to the price item
- Defining multi parameter based pricing for the price item

If the parameter usage is set to **Aggregation** while associating a parameter with a price item, the parameter is only used for aggregating transactions which are mapped to the price item. However, if the parameter usage is set to **Pricing** while associating a parameter with a price item, the parameter is used for aggregating transactions as well as for defining multi parameter based pricing for the price item.

You can associate a price item to one or more divisions. In addition, you can do the following when a price item is associated to a division:

- Associate the Service Quantity Identifiers (SQIs) with the Price Item for the Division
- Define the Division-Specific Characteristics for the Price Item

Price Item (Used for Searching)

The **Price Item** screen allows you to search for a price item or price item bundle using various search criteria. It also allows you to create and copy a price item or price item bundle. It contains the following zone:

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- Search Price Item on page 779

Through this screen, you can navigate to the following screens:

- Price Item (Used for Viewing) on page 819
- Price Item Relationship
- Price Item Assignments

Search Price Item

The **Search Price Item** zone allows you to search for a price item or price item bundle using various search criteria. It contains the following two sections:

- **Search Criteria** - The **Search Criteria** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Search By	Used to indicate whether you want to search for a price item or price item bundle using the price item details. The valid value is: • Price Item Details **Note:** By default, the **Price Item Details** option is selected.	Yes
Price Item	Used to search a particular price item or price item bundle.	No
Description	Used to search price items or price item bundles with a particular description.	No
Division	Used to search price items or price item bundles which are associated with a particular division. **Note:** You can only view those divisions to which you have access in the **Division** list.	No
Global Price List	Used to search price items or price item bundles which can be assigned to a global price list. The valid values are: • Yes • No	No
Price Item Usage	Used to search price items or price item bundles which is available for pricing or pricing and billing. The valid values are: • Pricing • Pricing and Billing **Note:** By default, the **Pricing and Billing** option is selected.	No
Bundle	Used to indicate whether you want to search a price item bundle. The valid values are: • Yes • No	No

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Field Name	Field Description	Mandatory (Yes or No)
Price Item Type	Used to search a particular type of price items or price item bundles. The valid values are: • Fees • Rate **Note:** This field appears when the **Pricing** option is selected from the **Price Item Usage** list.	No

Note: You must specify at least one search criterion while searching for a price item or price item bundle.

- **Search Results** - On clicking the **Search** button, the search results appear based on the specified search criteria. The **Search Results** section contains the following columns:

Column Name	Column Description
Price Item Information	Displays information about the price item or price item bundle. **Note:** It has a link. On clicking the link, the **Price Item** screen appears where you can view the details of the respective price item or price item bundle.
Bundle Type	Indicates the type of the price item bundle. If the price item bundle is available for pricing and billing, the valid values are: • Phantom • Ratio • Regular However, if the price item bundle is available for pricing and its price item type is set to **Fees**, the valid value is: • Regular
Price Item Type	Indicates the type of the price item or price item bundle. The valid values are: • Rate • Fees
Price Item Usage	Indicates whether the price item or price item bundle is available for pricing or pricing and billing. The valid values are: • Pricing • Pricing and Billing
Copy	On clicking the **Copy** (⧉) icon, the **Price Item** screen appears where you can create a new price item or price item bundle using an existing price item or price item bundle.
Price Item Assigned To	On clicking the **View** (🔗) icon in the **Price Item Assigned To** column, the **Price Item Assignments** screen appears where you can view the persons, accounts, and active price lists to which the price item or price item bundle is assigned.
Price Item Relationship	On clicking the **View** (🔗) icon in the **Price Item Relationship** column, the **Price Item Relationship** screen appears where you can view the list of the price items and price item bundles associated with the parent price item or added to the price item bundle.

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> **Note:** Pagination is used to display limited number of records in the **Search Results** section. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

Related Topics

For more information on...	See...
Price Item screen	Price Item (Used for Searching) on page 778
How to search for a price item or price item bundle	Searching for a Price Item or Price Item Bundle on page 781
How to view the details of a price item or price item bundle	Viewing the Price Item or Price Item Bundle Details on page 818
How to copy a price item or price item bundle	Copying a Price Item or Price Item Bundle on page 811
Price Item Assignments screen	Price Item Assignments
Price Item Relationship screen	Price Item Relationship

Searching for a Price Item or Price Item Bundle

Prerequisites

To search for a price item or price item bundle, you should have:

- Divisions defined in the application
- Price items or price item bundles associated with the division to which the user (i.e. who is performing this action) belongs

Procedure

To search for a price item or price item bundle:

1. Click the **Menu** link in the **Application** toolbar.
   A list appears.
2. From the **Main** menu, select **Pricing Management** and then click **Price Item**.
   A sub-menu appears.
3. Click the **Search** option from the **Price Item** sub-menu.
   The **Price Item** screen appears.
4. Enter the search criteria in the **Search Price Item** zone depending on whether you want to search for a *p*rice item or price item bundle.

> **Note:** ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.

5. Click **Search**.
   A list of price items or price item bundles that meet the search criteria appears in the **Search Results** section.

Related Topics

For more information on...	See...
Price Item screen	Price Item (Used for Searching) on page 778
Search Price Item zone	Search Price Item on page 779

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Defining a Price Item or Price Item Bundle

Prerequisites

To define a price item or price item bundle, you should have:

- Contract types, To Do types, and To Do roles defined in the application
- To Do roles associated with the required To Do type
- Value defined for the **Default Contract Type** option type in the **C1_PRICING** feature configuration

Procedure

To define a price item or price item bundle:

1. Click the **Menu** link in the **Application** toolbar.
   A list appears.
2. From the **Main** menu, select **Pricing Management** and then click **Price Item**.
   A sub-menu appears.
3. Click the **Add** option from the **Price Item** sub-menu.

   The **Price Item** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details about the price item or price item bundle.
   - **Parameters** - Used to associate a parameter with the price item or price item bundle. These associated parameters are then used for aggregating transactions and/or for defining the price item pricing.

     Note:

     The **Parameters** section appears in the **Price Item** screen when the **Multi Price Parameter** option type of the **C1_PPARM_FLG** feature configuration is set to **True**.

     You cannot associate parameters to the ratio and phantom price item bundles. Therefore, while defining a ratio or phantom price item bundle, the **Parameters** section does not appear in the **Price Item** screen.
   - **Divisions** - Used to associate the price item or price item bundle with one or more divisions. In addition, it enables you to:
     - Associate the service quantity identifiers (SQIs) with the price item or price item bundle for a division
     - Define the accrual type criteria of the price item or price item bundle for a division

       Note: This step is not applicable for the health insurance business.
     - Associate the price item or price item bundle with a hierarchy entity in an entity hierarchy relationship of a division

       Note: This step is not applicable for the health insurance business.
     - Define the cost of the price item or price item bundle for a division

       Note: This step is not applicable for the health insurance business.
     - Define the average price floor and ceil limits of the price item or price item bundle for a division

       Note: This step is not applicable for the health insurance business.
     - Define the negotiability floor and ceil values of the price item or price item bundle for a division

       Note: This step is not applicable for the health insurance business.
     - Define the division-specific characteristics for the price item or price item bundle
   - **Price Item Characteristics** - Used to define characteristics (which are applicable across divisions) for the price item or price item bundle.

   The **Main** section contains the following fields:

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Field Name	Field Description	Mandatory (Yes or No)
Price Item	Used to specify the price item or price item bundle.	Yes
Description	Used to specify the description for the price item or price item bundle.	Yes
Price Item Usage	Used to indicate whether the price item or price item bundle is available for pricing or pricing and billing. The valid values are: • **Pricing** - Used when you want to define pricing for the price item or price item bundle, but no charges should be created against it in the system. **Note:** This option is not applicable for the health insurance business. • **Pricing and Billing** - Used when you want to define pricing and create charges for the price item or price item bundle in the system. **Note:** By default, the **Pricing and Billing** option is selected.	Yes
Price Item Type	Used to indicate the type of the price item or price item bundle. The valid values are: • **Rate** - Used when you want to create a rate based price item or price item bundle. For example, savings, current, and loan interest services (i.e. price items) are rate based price items. **Note:** This option is not applicable for the health insurance business. • **Fees** - Used when you want to create a fee based price item or price item bundle. For example, debit credit service (i.e. price item) is a fee based price item.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	Note: This field appears when the **Pricing** option is selected from the **Price Item Usage** list. By default, the **Fees** option is selected. You cannot create a price item bundle when the **Pricing** option is selected from the **Price Item Usage** list and **Rate** option is selected from the **Price Item Type** list. The system automatically sets the price item type of those price items or price item bundles which are available for pricing and billing to **Fees**. Therefore, this field does not appear when the **Pricing and Billing** option is selected from the **Price Item Usage** list.	
Bundle	Used to indicate whether you want to create a price item bundle. The valid values are: • Yes • No **Note:** By default, the **No** option is selected. This field is not applicable for the health insurance business.	Yes
Bundle Type	Used to indicate the type of the price item bundle. If the **Pricing and Billing** option is selected from the **Price Item Usage** list, the valid values are: • Regular Bundle • Phantom Bundle • Ratio Bundle However, if the **Pricing** option is selected from the **Price Item Usage** list and the **Fees** option is selected from the **Price Item Type** list, you can only define a regular price item bundle. Therefore, by default, the value is set to **Regular**.	Yes (Conditional) **Note:** This field is required when you are creating a price item bundle.

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Field Name	Field Description	Mandatory (Yes or No)
	Note: This field appears when the **Yes** option is selected from the **Bundle** list. This field is enabled when the **Pricing and Billing** option is selected from the **Price Item Usage** list and the **Yes** option is selected from the **Bundle** list. You cannot define a price item bundle when the **Pricing** option is selected from the **Price Item Usage** list and **Rate** option is selected from the **Price Item Type** list. This field is not applicable for the health insurance business.	
Global Price List	Used to indicate whether the price item or price item bundle can be assigned to a global price list. The valid values are: • Yes • No **Note:** By default, the **No** option is selected.	Yes
Contract Type	Used to indicate the contract type that you want to associate with the price item or price item bundle. **Note:** This field appears when the **Pricing and Billing** option is selected from the **Price Item Usage** list. The **Search** (🔍) icon appears corresponding to the **Contract Type** field. On clicking the **Search** icon, the **Contract Type Search** window appears.	Yes
Price Item Manager To Do Type	Used to indicate the To Do type using which a To Do should be created when the deal creator or approver requests the price item manager (i.e. clicks the **Send Price Items for Approval** button) to approve the average price for the price item or price item bundle offered in a deal.	No

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The **Search** (🔍) icon appears corresponding to the **Price Item Manager To Do Type** field. On clicking the **Search** icon, the **To Do Type Search** window appears. On specifying the To Do type, the description of the To Do type appears corresponding to the **Price Item Manager To Do Type** field. This field is not applicable for the health insurance business.	
Price Item Manager To Do Role	Used to indicate that users with the specified To Do role can approve the average price for the price item or price item bundle offered in a deal. Note that the price item manager can approve the average price when it is within the average price floor and ceil limits defined for the To Do role. **Note:** The list appears when the price item manager To Do type is selected from the respective field. It includes only those To Do roles which are associated with the price item manager To Do type. This field is not applicable for the health insurance business.	Yes (Conditional) **Note:** This field is required when the price item manager To Do type is specified for the price item or price item bundle.
Average Price Floor and Ceil Limits	Used to indicate the manner in which you want to define the average price floor and ceil limits for the price item or price item bundle. The valid value is: • **Absolute Value Range** - Used when you want to define the average price floor and ceil limits in the absolute values. For example, the average price for the price item or price item bundle should be between 10$ to 15$. • **Spread Amount** - Used when you want to define the average floor and ceil limits based on the spread amount. • **Spread Percentage** - Used when you want to define the average floor and ceil limits based on the spread percentage.	Yes (Conditional) **Note:** This field is required when you are defining the average price floor and ceil limits of the price item or price item bundle for a division.

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Field Name	Field Description	Mandatory (Yes or No)
	Note: • Incase of **Spread Amount** and **Spread Percentage** options, the system calculates the average price of a price item and based on the average price and the spread amount or spread percentage, the average floor and ceil limits are derived. • This field is not applicable for the health insurance business.	
Sort Sequence	Used to specify the sequence in which the price item should appear in the price item hierarchy of the deal pricing management module.	No
Variable Price	Used to indicate whether the system inherits the pricing of the price item from the price list while orchestrating a deal in the deal pricing management module. **Note:** If the **Variable Price** option is selected, the pricing offered for a price item to an entity in the deal is overridden when the price list pricing is changed after orchestrating the deal in the system. However, if the **Variable Price** option is not selected, the pricing offered for a price item to an entity in the deal is not overridden when the price list pricing is changed in the system. This enables the relationship manager to create deals for an existing customers, accounts, and prospects where the pricing of the price items are fixed for a particular timeframe.	No

Tip: Alternatively, you can access the **Price Item** screen by clicking the **Add** button in the **Page Title** area of the **Price Item** screen.

4. Enter the required details in the **Main** section.
5. Associate the parameters with the price item or price item bundle, if required.

Note: For each predefined parameter which is associated with the price item or price item bundle, you can define a *s*et of valid predefined parameter values for the price item or price item bundle, if required.

6. Associate the price item or price item bundle with the required divisions.
7. Associate the SQIs with the price item or price item bundle for the required divisions.
8. Define the accrual type criteria of the price item or price item bundle for the required divisions.

Note: This step is not applicable for the health insurance business.

9. Associate the price item or price item bundle with a hierarchy entity in an entity hierarchy relationship of the *r*equired divisions.

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> **Note:** This step is not applicable for the health insurance business.

10. Define the cost of the price item or price item bundle for the required divisions.

> **Note:** This step is not applicable for the health insurance business.

11. Define the average price floor and ceil limits of the price item or price item bundle for the required divisions.

> **Note:** This step is not applicable for the health insurance business.

12. Define the negotiability floor and ceil values of the price item or price item bundle for the required divisions.

> **Note:** This step is not applicable for the health insurance business.

13. Define the division-specific characteristics for the price item or price item bundle. if required.
14. Define the characteristics for the price item or price item bundle, if required.
15. Click **Save**.
    The price item is defined.

> **Note:** While creating a price item or price item bundle which is available for pricing, the contract type specified in the **Default Contract Type** option type of the **C1_PRICING** feature configuration is automatically associated to the price item or price item bundle.

Related Topics

For more information on...	See...
Price Item screen	Price Item (Used for Searching) on page 778
How to associate a parameter with a price item or price item bundle	Associating a Parameter with a Price Item or Price Item Bundle on page 789
How to associate a price item or price item bundle with a division	Associating a Price Item or Price Item Bundle with a Division on page 794
How to associate an SQI with a price item or price item bundle for a division	Associating an SQI with a Price Item or Price Item Bundle for a Division on page 796
How to define the accrual type criteria of a price item or price item bundle for a division	Defining the Accrual Type Criteria of a Price Item or Price Item Bundle for a Division on page 800
How to associate a price item or price item bundle with a hierarchy entity in an entity hierarchy relationship of a division	Associating a Price Item or Price Item Bundle with a Hierarchy Entity in an Entity Hierarchy Relationship of a Division on page 802
How to define the cost of a price item or price item bundle for a division	Defining the Cost of a Price Item or Price Item Bundle for a Division on page 804
How to define the average price floor and ceil limits of a price item or price item bundle for a division	Defining the Average Price Floor and Ceil Values of a Price Item or Price Item Bundle for a Division on page 806
How to define the rate negotiability floor and ceil values of a price item or price item bundle for a division	Defining the Rate Negotiability Floor and Ceil Values of a Price Item or Price Item Bundle for a Division
How to define a division-specific characteristic for a price item or price item bundle	Defining a Division-Specific Characteristic for a Price Item or Price Item Bundle on page 798
How to define a characteristic for a price item or price item bundle	Defining a Characteristic for a Price Item or Price Item Bundle on page 810
How to set the **C1_PRICING** feature configuration	Setting the C1_PRICING Feature Configuration on page 4464

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Associating a Parameter with a Price Item or Price Item Bundle

You can define multi parameter based pricing for a price item or price item bundle when the parameters using which you want to define the price item pricing are associated with the respective price item or price item bundle during the pricing date range. Let us understand this with the help of an example from the financial institution domain.

The following table illustrates how a financial institution can offer different price for a price item based on the return codes:

Service	Price Item	Parameter	Parameter Value	Price
SEPA Direct Debit Return	SEPADDR	Return Code (RTURNCD)	AC01	0.1$
			AC04	0.2$
			AC06	0.3$
			AG01	0.10$

In such case, you need to first define a predefined parameter named Return Code where the parameter usage is set to **Price Item**). In the Return Code parameter, you must specify the above listed return codes (i.e. AC01, AC04, AC06, and AG01) as the predefined values. Then, in order to define multi parameter based pricing for the SEPADDR price item using the Return Code parameter, you must associate the Return Code parameter with the SEPADDR price item using the following specifications:

Parameter	Display Order	Mandatory (Yes or No)	Optional Priority
Return Code	10	Yes	-

Let us understand this with the help of another example from the health insurance domain.

The following table illustrates how a self-funded customer can be charged different admin fee for the services based on health coverage class and network type:

Service	Price Item	Health Coverage Class	Network Type	Fees
Claim Based Fees	CLBDFS	Medical	In	$100
		Medical	Out	$150
		Dental	In	$50
		Dental	Out	$75

In such case, you need to first define two predefined parameters named Health Coverage Class and Network Type where the parameter usage is set to **Price Item**). In the Health Coverage Class parameter, you must specify the above listed values (i.e. Medical and Dental)) as the predefined values. And, in the Network Type parameter, you must specify the above listed values (i.e. In and Out)) as the predefined values. Then, in order to define parameter based pricing for the CLBDFS price item using the Health Coverage Class and Network Type parameters, you must associate these parameters with the CLBDFS price item using the following specifications:

Parameter	Display Order	Mandatory (Yes or No)	Optional Priority
Health Coverage Class	10	Yes	-
Network Type	20	Yes	-

Prerequisites

To associate a parameter with a price item or price item bundle, you should have:

- Parameters defined in the application (where the parameter usage is set to **Price Item**)

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Procedure

To associate a parameter with a price item or price item bundle:

1. Click the **Parameters** or **Show All** link in the **Section** pane when you are defining, editing, or copying a price *i*tem or price item bundle.

   The **Parameters** section appears. It contains the following fields in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Effective Start Date	Used to specify the date from when the parameter is associated with the price item or price item bundle. **Note:** You can either manually specify the date or select it using the **Date Picker** ( ) icon corresponding to the field.	Yes
Effective End Date	Used to specify the date till when the parameter is associated with the price item or price item bundle. **Note:** You can either manually specify the date or select it using the **Date Picker** ( ) icon corresponding to the field.	No
Parameter	Used to indicate the parameter that you want to associate with the price item or price item bundle. **Note:** The **Search** ( ) icon appears corresponding to the **Parameter** field. On clicking the **Search** icon, the **Parameter Search** window appears. In the **Parameter Search** window, the system allows you to search only those parameters where the parameter usage is set to **Price Item**. If you select a predefined parameter, the **Add** (icon appears corresponding to the **Parameter** field. On clicking the **Add** icon, a grid appears where you can specify a list of predefined parameter values which are valid for the price item or price item bundle while defining its pricing. If you do not list any predefined parameter value in this grid, the system enables you to specify any predefined value of the parameter while defining the pricing for the price item or price item bundle.	Yes
Business Label	Used to specify a business label for the parameter. If you specify the business label for a parameter, the business label appears throughout the application instead of the parameter name.	No
Display Order	Used to indicate the order in which the parameter and its value should appear in the	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	pricing parameter information string across the application.	
Parameter Usage	Used to indicate whether you want to use the parameter for aggregation and/or for defining the price item pricing. The valid values are: • **Aggregation** - Used when you want to use the parameter for aggregating transactions. • **Pricing** - Used when you want to use the parameter for aggregating transactions as well as for defining the price item pricing.	Yes
Mandatory	Used to indicate whether the parameter is mandatory while defining the price item pricing.	No
Priority	Used to indicate the priority in which optional parameters should be considered while determining best fit price for the price item or price item bundle. **Note:** This field is disabled when the **Mandatory** option is selected.	Yes (Conditional) **Note:** This field is required when the **Mandatory** option is not selected.

Note:

The **Parameters** section appears in the **Price Item** screen when the **Multi Price Parameter** option type of the **C1_PPARM_FLG** feature configuration is set to **True**.

You cannot associate parameters to the ratio and phantom price item bundles. Therefore, while defining a ratio or phantom price item bundle, the **Parameters** section does not appear in the **Price Item** screen.

2. Enter the required details in the **Parameters** section.
3. If you want to associate more than one parameter with the price item or price item bundle, click the **Add** (+) *i*con and then repeat step 2.

Note:

However, if you want to remove a parameter from the price item or price item bundle, click the **Delete** (🗑) icon corresponding to the parameter. You can edit the parameter details and remove a parameter from the price item or price item bundle when the parameter or any other parameter from the same date range is not yet used for aggregation or for defining the price item pricing.

You can add a parameter which is used for aggregation, whenever required. However, you can add a parameter which is used for pricing when any other parameter from the same date range is not yet used for aggregation or for defining the price item pricing.

4. For each predefined parameter which is associated with the price item or price item bundle, you can define a set *o*f valid predefined parameter values for the price item or price item bundle, if required.
5. Click **Save**.
   The parameters are associated with the price item or price item bundle.

Note: By default, the priority of all parameters which are mandatory is set to 0.

Related Topics

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For more information on...	See...
How to define a price item or price item bundle	Defining a Price Item or Price Item Bundle on page 782
How to edit a price item or price item bundle	Editing a Price Item or Price Item Bundle on page 829
How to copy a price item or price item bundle	Copying a Price Item or Price Item Bundle on page 811
How to define the valid predefined parameter values for a price item or price item bundle	Defining the Valid Predefined Parameter Values for a Price Item or Price Item Bundle on page 792

Defining the Valid Predefined Parameter Values for a Price Item or Price Item Bundle

A predefined parameter may have hundreds of values defined in the system. But, there might be situations when only certain predefined parameter values are applicable for a price item or price item bundle while defining its pricing. In such case, you can define a set of valid predefined parameter values for a price item or price item bundle. For example, the Return Code parameter has the following predefined parameter values:

Parameter Value	Description
AC01	Account Identifier Incorrect (i.e. invalid IBAN)
AC04	Account Closed
AC06	Account Blocked
AG01	Direct Debit Forbidden for Regulatory Reasons
AG02	Operation/Transaction Code Incorrect
AM04	Insufficient Funds
AM05	Duplicate Collection
MD01	Unauthorized Transaction
MD06	Disputed Authorized Transaction

If only the MD01 and MD06 predefined parameter values are applicable for the SEPA Debit Refund (SEPADRF) price item, you can define MD01 and MD06 as the valid predefined parameter values for the SEPADRF price item. In such case, the system will allow you to define the pricing for the SEPADRF price item only using the MD01 or MD06 parameter value. However, if all the above listed predefined parameter values are applicable for the SEPA Direct Debit Return (SEPADDR) price item, you must not define the valid predefined parameter values for the SEPADDR price item. In such case, the system will allow you to define the pricing for the SEPADDR price item using any of the above listed parameter value.

Another example, the Health Coverage Class parameter has the following predefined parameter values:

Parameter Value	Description
MEDICAL	Medical
DENTAL	Dental
VISION	Vision

If only the MEDICAL and DENTAL predefined parameter values are applicable for the Claim Based Fees (CLBDFS) price item, you can define MEDICAL and DENTAL as the valid predefined parameter values for the CLBDFS price item. In such case, the system will allow you to define the pricing for the CLBDFS price item only using the MEDICAL or DENTAL parameter value. However, if all the above listed predefined parameter values are applicable for the Claim Based Fees (CLBDFS) price item, you must not define the valid predefined parameter values for the CLBDFS price item. In such case, the system will allow you to define the pricing for the CLBDFS price item using any of the above listed parameter value.

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Prerequisites

To define the valid predefined parameter values for a price item or price item bundle, you should have:

- Predefined values defined for the parameter which is associated with the price item or price item bundle
- Price items or price item bundles associated with the division to which the user (i.e. who is performing this action) belongs

Procedure

To define the valid predefined parameter values for a price item or price item bundle:

1. Click the **Parameters** or **Show All** link in the **Section** pane when you are defining, editing, or copying a price *i*tem or price item bundle.
   The **Parameters** section appears.
2. Click the **Add** (+) icon in the **Parameter** column corresponding to the predefined parameter which is *a*ssociated with the price item or price item bundle.

   The following field appears in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Parameter Value	Used to indicate the predefined parameter value which you can use for the price item or price item bundle while defining the pricing.	Yes (Conditional) **Note:** This field is required when you are defining the valid predefined parameter values for the price item or price item bundle.
	Note: The **Search** (🔍) icon appears corresponding to the **Parameter Value** field. On clicking the **Search** icon, the **Predefined Parameter Value Search** window appears. On specifying the valid predefined parameter value for a price item or price item bundle, the description of the predefined parameter value appears corresponding to the **Parameter Value** field.	

3. Enter a predefined parameter value which is valid for the price item or price item bundle while defining its pricing.
4. If you want to define more than one valid predefined parameter value for the price item or price item bundle, *c*lick the **Add** (+) icon and then repeat step 3.

> **Note:** However, if you want to remove a valid predefined parameter value from the price item or price item bundle, click the **Delete** (🗑) icon corresponding to the parameter value. You can remove a valid predefined parameter value from the price item or price item bundle when the parameter value is not yet used for defining the price item pricing.

5. Click **Save**.
   The valid predefined parameter values are defined for the price item or price item bundle.

Related Topics

For more information on...	See...
How to associate a parameter with a price item or price item bundle	Associating a Parameter with a Price Item or Price Item Bundle on page 789

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Associating a Price Item or Price Item Bundle with a Division

You can assign a price item or price item bundle to a person or account when the price item or price item bundle is associated with the division to which the person or account belongs. Let us understand this with the help of an example from the financial institution domain.

The following table illustrates how a price item can be associated with one or more divisions in the financial institution domain:

Price Item	Division
SEPA Direct Debit Return (SEPADDR)	001-AL
	002-CA
	003-FL
	004-IN
Stop Payment (STPPMT)	002-CA
	003-FL
	004-IN

In such case, you can assign the SEPADDR price item to any person or account which belongs to the 001-AL, 002-CA, 003-FL, or 004-IN division. However, you can assign the STPPMT price item to any person or account which belongs to the 002-CA, 003-FL, or 004-IN division.

Let us understand this with the help of an example from the health insurance domain.

The following table illustrates how a price item can be associated with one or more divisions in the health insurance domain:

Price Item	Division
Claim Based Fees (CLBDFS)	002-CA
	003-FL
	004-IN

In such case, you can charge the CLBDFS price item to any person or account which belongs to the 002-CA, 003-FL, or 004-IN division.

Prerequisites

To associate a price item or price item bundle with a division, you should have:

- Divisions defined in the application
- Divisions associated with the access group to which the user (i.e. who is performing this action) belongs

Procedure

To associate a price item or price item bundle with a division:

1. Click the **Divisions** or **Show All** link in the **Section** pane when you are defining, editing, or copying a price *i*tem or price item bundle.

   The **Divisions** section appears. It contains the following fields in a grid:

Field Name	Field Description	Mandatory (Yes or No)
SQIs	On clicking the **Add** () icon, you can associate an SQI with the price item or price item bundle for the division.	Not applicable

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Field Name	Field Description	Mandatory (Yes or No)
Division Characteristics	On clicking the **Add** (+) icon, you can define a division-specific characteristic for the price item or price item bundle.	Not applicable
Accrual Type Criteria	On clicking the **Add** (+) icon, you can define the accrual type criteria of the price item or price item bundle for the division. **Note:** This feature is not applicable for the health insurance business.	Not applicable
Entity Hierarchy	On clicking the **Add** (+) icon, you can associate the price item or price item bundle with a hierarchy entity of an entity hierarchy relationship for the division. **Note:** This feature is not applicable for the health insurance business.	Not applicable
Costs	On clicking the **Add** (+) icon, you can define the cost of the price item or price item bundle for the division. **Note:** This feature is not applicable for the health insurance business.	Not applicable
Floor and Ceiling Type	On clicking the **Add** (+) icon, you can define the average price floor and ceil limits of the price item or price item bundle for the division. **Note:** This feature is not applicable for the health insurance business.	Not applicable
Negotiability	On clicking the **Add** (+) icon, you can define the negotiability floor and ceil limits of the price item or price item bundle for the division. **Note:** This feature is not applicable for the health insurance business.	No
Division	Used to indicate the division to which you want to associate the price item or price item bundle. **Note:** You can only view those divisions to which you have access in the **Division** list.	Yes (Conditional) **Note:** This field is required while associating the price item or price item bundle with a division.

2. Select the division from the respective field.
3. If you want to associate the price item or price item bundle with more than one division, click the **Add** (+) *i*con and then repeat step *2*.

Note: However, if you want to remove the price item or price item bundle from a division, click the **Delete** (🗑) icon corresponding to the division. You cannot remove the price item or price item bundle from a division when it is assigned to a person or account which belongs to the division.

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4. Associate the SQIs with the price item or price item bundle for the required divisions.
5. Define the accrual type criteria of the price item or price item bundle for the required divisions.

> **Note:** This step is not applicable for the health insurance business object.

6. Associate the price item or price item bundle with a hierarchy entity of an entity hierarchy relationship for the *r*equired divisions.

> **Note:** This step is not applicable for the health insurance business object.

7. Define the cost of the price item or price item bundle for the required divisions.

> **Note:** This step is not applicable for the health insurance business object.

8. Define the floor and ceiling type of the price item or price item bundle for the required divisions.

> **Note:** This step is not applicable for the health insurance business object.

9. Define the rate negotiability floor and ceil limits of the price item or price item bundle for the required divisions.

> **Note:** This step is not applicable for the health insurance business object.

10. Define the division-specific characteristics for the price item or price item bundle. if required.
11. Click **Save**.
    The price item or price item bundle is associated with the divisions.

> **Tip:** Alternatively, you can associate a price item or price item bundle with a division using the **Division** screen. For more information, see Associating a Price Item or Price Item Bundle with a Division on page 942.

Related Topics

For more information on...	See...
How to define a price item or price item bundle	Defining a Price Item or Price Item Bundle on page 782
How to edit a price item or price item bundle	Editing a Price Item or Price Item Bundle on page 829
How to copy a price item or price item bundle	Copying a Price Item or Price Item Bundle on page 811
How to associate an SQI with a price item or price item bundle for a division	Associating an SQI with a Price Item or Price Item Bundle for a Division on page 796
How to define the accrual type criteria of a price item or price item bundle for a division	Defining the Accrual Type Criteria of a Price Item or Price Item Bundle for a Division on page 800
How to associate a price item or price item bundle with a hierarchy entity of an entity hierarchy relationship for a division	Associating a Price Item or Price Item Bundle with a Hierarchy Entity in an Entity Hierarchy Relationship of a Division on page 802
How to define the cost of a price item or price item bundle for a division	Defining the Cost of a Price Item or Price Item Bundle for a Division on page 804
How to define the average price floor and ceil limits of a price item or price item bundle for a division	Defining the Average Price Floor and Ceil Values of a Price Item or Price Item Bundle for a Division on page 806
How to define a division-specific characteristic for a price item or price item bundle	Defining a Division-Specific Characteristic for a Price Item or Price Item Bundle on page 798

Associating an SQI with a Price Item or Price Item Bundle for a Division

In the transaction aggregation process, an SQI based billable charge is created for a price item or price item bundle (to which a transaction is mapped) when:

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- The SQIs are associated with the price item or price item bundle for the division to which the account (i.e. for which the billable charge is created) belongs.
- The transaction aggregation rules are defined for such SQIs in the system.

Let us assume that the A1 account belongs to the 201-NJ division and the A2 account belongs to the 209-CA division.

The following table illustrates how you can define division-specific SQIs for a price item in the financial institution domain:

Price Item	Division	Service Quantity Identifiers (SQIs)
Stop Payments (STPY)	201-NJ	Number of Transactions (NBRTXN)
		Transaction Volume (TXNVOL)
		Transaction Amount (TXNAMT)
	209-CA	Number of Transactions (NBRTXN)
		Transaction Amount (TXNAMT)

Now, when an SQI based billable charge is created for the A1 account through the transaction aggregation process, the system calculates the following SQIs using the respective transaction aggregation rule:

- Number of Transactions (NBRTXN)
- Transaction Volume (TXNVOL)
- Transaction Amount (TXNAMT)

And, when an SQI based billable charge is created for the A2 account through the transaction aggregation process, the system calculates the following SQIs using the respective transaction aggregation rule:

- Number of Transactions (NBRTXN)
- Transaction Amount (TXNAMT)

Another example, you can calculate the enrollment based fees for a self-funded customer based on Per Subscriber Per Month or Per Member Per Month for the 201-NJ and 209-CA divisions. Therefore, you need to associate two SQIs – Subscriber Count and Member Count with the Enrollment Based Fees (ERBDFS) price item.

The following table illustrates how you can define division-specific SQIs for a price item in the health insurance domain:

Price Item	Division	Service Quantity Identifiers (SQIs)
Enrollment Based Fees (ERBDFS)	201-NJ	Subscriber Count (SUBCNT)
		Member Count (MEMCNT)
	209-CA	Subscriber Count (SUBCNT)
		Member Count (MEMCNT)

Prerequisites

To associate an SQI with a price item or price item bundle for a division, you should have:

- Service Quantity Identifiers (SQIs) defined in the application
- Price items or price item bundles associated with the division to which the user (i.e. who is performing this action) belongs

Procedure

To associate an SQI with a price item or price item bundle for a division:

1. Click the **Divisions** or **Show All** link in the **Section** pane when you are defining, editing, or copying a price *i*tem or price item bundle.
   The **Divisions** section appears.

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2. Click the **Add** (+) icon in the **SQIs** column corresponding to the division for which you want to associate *S*QIs with the price item or price item bundle.

   The following field appears in a grid:

Field Name	Field Description	Mandatory (Yes or No)
SQI	Used to indicate the SQI that you want to associate with the price item or price item bundle for the division.	Yes (Conditional)
	Note: The **Search** (🔍) icon appears corresponding to the **SQI** field. On clicking the **Search** icon, the **Service Quantity Identifier Search** window appears. On specifying the SQI, the description of the SQI appears corresponding to the **SQI** field.	**Note:** This field is required while associating an SQI with the price item or price item bundle for the division.

3. Enter the required details in the **SQIs** grid.
4. If you want to associate more than one SQI with the price item or price item bundle for the division, click the **Add** (+) icon *a*nd then repeat step 3.

   Note: However, if you want to remove an SQI from the price item or price item bundle for the division, click the **Delete** (🗑) icon corresponding to the SQI. You cannot remove an SQI from the price item or price item bundle for the division when an SQI based billable charge is created using the SQI.

5. Click **Save**.
   The SQIs are associated with the price item or price item bundle for the division.

Related Topics

For more information on...	See...
How to define a price item or price item bundle	Defining a Price Item or Price Item Bundle on page 782
How to edit a price item or price item bundle	Editing a Price Item or Price Item Bundle on page 829
How to copy a price item or price item bundle	Copying a Price Item or Price Item Bundle on page 811
How to associate a price item or price item bundle with a division	Associating a Price Item or Price Item Bundle with a Division on page 794

Defining a Division-Specific Characteristic for a Price Item or Price Item Bundle

Prerequisites

To define a division-specific characteristic for a price item or price item bundle, you should have:

- Characteristic types defined in the application (where the characteristic entity is set to **Division/Price Item Combination**)
- Price items or price item bundles associated with the division to which the user (i.e. who is performing this action) belongs

Procedure

To define a division-specific characteristic for a price item or price item bundle:

1. Click the **Divisions** or **Show All** link in the **Section** pane when you are defining, editing, or copying a price *i*tem or price item bundle.

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The **Divisions** section appears.

2. Click the **Add** (+) icon in the **Division Characteristics** column corresponding to the division for which you want to define division-specific price item or price item bundle characteristics.

   The following fields appear in the grid:

Field Name	Field Description	Mandatory (Yes or No)
Effective Date	Used to specify the date from when the price item or price item bundle characteristic is effective for the division. **Note:** You can either manually specify the date or select it using the **Date Picker** (calendar) icon corresponding to the field.	Yes (Conditional) **Note:** This field is required while defining a division-specific characteristic for the price item or price item bundle.
Characteristic Type	Used to indicate the characteristic type. **Note:** The list includes only those characteristic types where the characteristic entity is set to **Division/Price Item Combination**.	Yes (Conditional) **Note:** This field is required while defining a division-specific characteristic for the price item or price item bundle.
Characteristic Value	Used to specify the value for the characteristic type. **Note:** If you select a predefined characteristic type, the **Search** (magnifier) icon appears corresponding to the **Characteristic Value** field. On clicking the **Search** icon, the **Predefined Characteristic Search** window appears. On specifying the value for a predefined characteristic type, the description of the characteristic value appears corresponding to the **Characteristic Value** field.	Yes (Conditional) **Note:** This field is required while defining a division-specific characteristic for the price item or price item bundle.

3. Enter the required details in the **Divisions** section.
4. If you want to define more than one division-specific characteristic for the price item or price item bundle, click the **Add** (+) icon and then repeat step 3.

> **Note:** However, if you want to remove a division-specific characteristic from the price item or price item bundle, click the **Delete** (trash) icon corresponding to the characteristic.

5. Click **Save**.
   The division-specific characteristics are defined for the price item or price item bundle.

Related Topics

For more information on...	See...
How to define a price item or price item bundle	Defining a Price Item or Price Item Bundle on page 782
How to edit a price item or price item bundle	Editing a Price Item or Price Item Bundle on page 829
How to copy a price item or price item bundle	Copying a Price Item or Price Item Bundle on page 811

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For more information on...	See...
How to associate a price item or price item bundle with a division	Associating a Price Item or Price Item Bundle with a Division on page 794

Defining the Accrual Type Criteria of a Price Item or Price Item Bundle for a Division

Note: This topic is not applicable for the health insurance business.

The accrual type criteria of a price item or price item bundle is referred when the accrual is calculated for an account using an accrual type where the **Price Item Accrual Criteria Required** option is selected. The system behaves in the following manner when the **Price Item Accrual Criteria Required** option is selected in the accrual type:

If the accrual type criteria of a price item or price item bundle is set to...	Then...
Actual	The system considers the billable charges of the price item for accrual when the following conditions are met: • The price item is not excluded in the accrual type. • The accrual is calculated for an account using the accrual type where the accrual criteria is set to **Actual**.
Historical	The system considers the billable charges of the price item for accrual when the following conditions are met: • The price item is not excluded in the accrual type. • The accrual is calculated for an account using the accrual type where the accrual criteria is set to **Historical**.
Not Applicable	The system considers the billable charges of the price item for accrual when the following conditions are met: • The price item is not excluded in the accrual type • The accrual is calculated for an account using the accrual type where the accrual criteria is set to **Actual** or **Historical**.

The system enables you to define accrual type criteria of a price item or price item bundle for each division. For example, you can maintain different accrual type criteria of the Stop Payments (STPY) price item for each division as shown below:

The following table illustrates how you can define different accrual type criteria for a price item in each division:

Price Item	Division	Accrual Type Criteria
Stop Payments (STPY)	201-NJ	Actual
	209-CA	Historical
	210-FL	Not Applicable
	215-OX	Actual
	220-AL	Historical
	223-NJ	Not Applicable

Prerequisites

To define the accrual type criteria of a price item or price item bundle for a division, you should have:

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- Price items or price item bundles associated with the division to which the user (i.e. who is performing this action) belongs

Procedure

To define the accrual type criteria of a price item or price item bundle for a division:

1. Click the **Divisions** or **Show All** link in the **Section** pane when you are defining, editing, or copying a price *i*tem or price item bundle.
   The **Divisions** section appears.
2. Click the **Add** (+) icon in the **Accrual Type Criteria** column corresponding to the division for which you want *t*o define accrual type criteria of the price item or price item bundle.

   The following field appears in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Accrual Type Criteria	Used to indicate whether the billable charges of the price item should be considered for accrual depending on the accrual criteria specified in the accrual type. The valid values are: • **Actual** - Used when you want the system to consider billable charges of the price item for accrual when the accrual criteria in the accrual type is set to **Actual**. • **Historical** - Used when you want the system to consider billable charges of the price item for accrual when the accrual criteria in the accrual type is set to **Historical**. • **Not Applicable** - Used when you want the system to consider billable charges of the price item for accrual when the accrual criteria in the accrual type is set to **Actual** or **Historical**. **Note:** By default, the **Not Applicable** option is selected.	Yes (Conditional) **Note:** This field is required while defining the accrual type criteria of the price item or price item bundle for the division.

3. Select the accrual type criteria from the respective field.
4. Click **Save**.
   The accrual type criteria of the price item or price item bundle is defined for the division.

Related Topics

For more information on...	See...
How to define a price item or price item bundle	Defining a Price Item or Price Item Bundle on page 782
How to edit a price item or price item bundle	Editing a Price Item or Price Item Bundle on page 829
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Associating a Price Item or Price Item Bundle with a Hierarchy Entity in an Entity Hierarchy Relationship of a Division

Note: This topic is not applicable for the health insurance business.

Once you design the structure of an entity hierarchy relationship, you can associate a price item or price item bundle with a hierarchy entity at any level in the entity hierarchy relationship. You can associate a price item or price item bundle with a hierarchy entity only from the **Price Item** screen. The system enables you to define division-specific hierarchy for a price item or price item bundle. Therefore, while associating a price item or price item bundle with a hierarchy entity, you can select a hierarchy entity from any entity hierarchy relationship which is created for the division. However, the system checks whether the association date range is within the entity hierarchy relationship date range.

For example, you can associate the ACH Transfer (ACHTRN) price item with the Payments hierarchy entity in the Cash Management entity hierarchy relationship as shown below:

```
Cash Management
    Payments
        ACH Transfer
```

Associating a price item or price item bundle with a hierarchy entity does not has any impact on the billing module. At present, the price item hierarchy is only displayed in the Deal Modelling and Simulation module.

Prerequisites

To associate a price item or price item bundle with a hierarchy entity in an entity hierarchy relationship of a division, you should have:

- Entity hierarchy relationships defined for the required divisions
- Hierarchy entities included at the required levels in the entity hierarchy relationship
- Price items or price item bundles associated with the division to which the user (i.e. who is performing this action) belongs

Procedure

To associate a price item or price item bundle with a hierarchy entity in an entity hierarchy relationship of a division:

1. Click the **Divisions** or **Show All** link in the **Section** pane when you are defining, editing, or copying a price *i*tem or price item bundle.
   The **Divisions** section appears.
2. Click the **Add** (+) icon in the **Entity Hierarchy** column corresponding to the division for which you want to *d*efine price item or price item bundle hierarchy.

   The following fields appear in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Hierarchy	Used to indicate the entity hierarchy relationship in which you want to include the price item or price item bundle. **Note:** The **Search** (🔍) icon appears corresponding to the **Hierarchy** field. On clicking the **Search** icon, the **Hierarchy Search** window appears.	Yes (Conditional) **Note:** This field is required while associating the price item or price item bundle with a hierarchy entity in an entity hierarchy relationship of the division.
Parent Entity	Used to indicate the hierarchy entity to which you want to associate the price item or price item bundle.	Yes (Conditional)

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The list appears when the entity hierarchy relationship is specified in the **Hierarchy** field. It contains the hierarchy entities which are included at the root and subsequent levels in the entity hierarchy relationship.	**Note:** This field is required while associating the price item or price item bundle with a hierarchy entity in an entity hierarchy relationship of the division.
Start Date	Used to specify the date from when the price item or price item bundle is associated with the hierarchy entity in the entity hierarchy relationship. **Note:** The start date cannot be later than the end date. The start date cannot be earlier than the entity hierarchy relationship start date. You can either manually specify the date or select it using the **Date Picker** icon corresponding to the field.	Yes (Conditional) **Note:** This field is required while associating the price item or price item bundle with a hierarchy entity in an entity hierarchy relationship of the division.
End Date	Used to specify the date till when the price item or price item bundle is associated with the hierarchy entity in the entity hierarchy relationship. **Note:** The end date cannot be earlier than the start date. The end date cannot be later than the entity hierarchy relationship end date. You can either manually specify the date or select it using the **Date Picker** icon corresponding to the field.	No

3. Enter the required details in the **Entity Hierarchy** grid.
4. If you want to associate the price item or price item bundle to more the one hierarchy entity in the same or *d*ifferent entity hierarchy relationship, click the **Add** (+) icon and then repeat step 3.

Note:

You cannot associate the price item or price item bundle to multiple hierarchy entities in the same or different entity hierarchy relationship for the same or overlapping date range.

However, if you want to disassociate the price item or price item bundle from a hierarchy entity of an entity hierarchy relationship, click the **Delete** icon corresponding to the hierarchy and parent entity combination.

5. Click **Save**.
   The price item or price item bundle is associated with a hierarchy entity in an entity hierarchy relationship of the division.

Related Topics

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For more information on...	See...
How to define a price item or price item bundle	Defining a Price Item or Price Item Bundle on page 782
How to edit a price item or price item bundle	Editing a Price Item or Price Item Bundle on page 829
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Defining the Cost of a Price Item or Price Item Bundle for a Division

Note: This topic is not applicable for the health insurance business.

Oracle Revenue Management and Billing enables you to maintain the different types of fixed and variable costs of a price item or price item bundle for each division. The system uses the fixed and variable cost information while calculating the cost of a price item or price item bundle in a deal. It considers the cost which is defined for the division to which the account or person belongs. It derives the fixed and/or variable cost which is effective on the deal start date.

The system enables you to maintain the following types of costs in different currencies:

- Additional Cost - Fixed
- Additional Cost - Variable
- Fixed Internal
- Fixed Third Party
- Variable Internal
- Variable Third Party

While calculating the cost of a price item or price item bundle in a deal, the system converts the cost in the deal currency when the cost currency is different from the deal currency. As the name implies, the fixed cost is an expense that does not change with the increase or decrease in the price item volume or commitments. Therefore, the total fixed cost is equal to the sum of fixed cost which is effective on the deal start date for the division. However, the variable cost is an expense that change with the increase or decrease in the price item volume or commitments. Therefore, the total variable cost is equal to the sum of multiplication of variable cost (which is effective on the deal start date for the division) and price item volume or commitments.

Let us understand this with the help of an example:

The following table illustrates how you can define division-specific costs for a price item:

Price Item	Division	Cost Type	Cost Amount
PI1	201-NJ	Fixed Third Party Cost	$5
		Fixed Internal Cost	$3
		Additional Fixed Cost	$1
		Variable Third Party Cost	$0.1
		Variable Internal Cost	$0.65
		Additional Variable Cost	$0.5

If a deal is created for a person who belongs to the 201-NJ division and if the PI1 price item is assigned to the person in the deal and if the original volume and proposed commitment of the PI1 price item in the deal is set to 100 and 200, respectively, the system calculates the cost of the PI1 price item in the following manner:

The following table illustrates how the original and proposed cost is calculated for a price item in a deal:

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Original Cost	
Total Fixed Cost	$5 + $3 + $1 = $9
Total Variable Cost	(100*$0.1) + (100*$0.65) + (100*$0.5) = $10 + $65 + $50 = $125
Total Cost	$9 + $125 = $134
Proposed Cost	
Total Fixed Cost	$5 + $3 + $1 = $9
Total Variable Cost	(200*$0.1) + (200*$0.65) + (200*$0.5) = $20 + $130 + $100 = $250
Total Cost	$9 + $250 = $259

Here, the assumption is the deal and cost currency is same (i.e. USD). The system then uses the total original and proposed costs for calculating the original and proposed profitability of the deal.

Prerequisites

To define the cost of a price item or price item bundle for a division, you should have:

- Currencies defined in the application
- Price items or price item bundles associated with the division to which the user (i.e. who is performing this action) belongs

Procedure

To define the cost of a price item or price item bundle for a division:

1. Click the **Divisions** or **Show All** link in the **Section** pane when you are defining, editing, or copying a price *i*tem or price item bundle.
   The **Divisions** section appears.
2. Click the **Add** () icon in the **Costs** column corresponding to the division for which you want to define the *c*osts of the price item or price item bundle.

   The following fields appear in a grid:

Field Name	**Field Description**	**Mandatory (Yes or No)**
Effective Date	Used to specify the date from when the cost of the price item or price item bundle is effective for the division. **Note:** You can either manually specify the date or select it using the **Date Picker** ( ) icon corresponding to the field.	Yes (Conditional) **Note:** This field is required while defining the cost of the price item or price item bundle for the division.
Cost Type	Used to indicate the type of cost incurred in the division for the price item or price item bundle. The valid values are: • Additional Fixed Cost • Additional Variable Cost • Fixed Third Party Cost • Fixed Internal Cost • Variable Internal Cost • Variable Third Party Cost	Yes (Conditional) **Note:** This field is required while defining the cost of the price item or price item bundle for the division.

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Field Name	Field Description	Mandatory (Yes or No)
Cost Value	Used to specify the cost amount.	Yes (Conditional) **Note:** This field is required while defining the cost of the price item or price item bundle for the division.
Cost Currency	Used to specify the currency in which you want to define the cost. The system does currency conversion when the cost currency is different from the deal currency. **Note:** The list includes only those currencies which are already defined in the system.	Yes (Conditional) **Note:** This field is required while defining the cost of the price item or price item bundle for the division.

3. Enter the required details in the **Costs** grid.
4. If you want to define more than one cost of the price item or price item bundle for the division, click the **Add** (+) icon *a*nd then repeat step 3.

Note: However, if you want to remove the cost of the price item or price item bundle from the division, click the **Delete** (🗑) icon corresponding to the cost.

5. Click **Save**.
   The cost of the price item or price item bundle is defined for the division.

Related Topics

For more information on...	See...
How to define a price item or price item bundle	Defining a Price Item or Price Item Bundle on page 782
How to edit a price item or price item bundle	Editing a Price Item or Price Item Bundle on page 829
How to copy a price item or price item bundle	Copying a Price Item or Price Item Bundle on page 811
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Defining the Average Price Floor and Ceil Values of a Price Item or Price Item Bundle for a Division

Note: This topic is not applicable for the health insurance business.

Oracle Revenue Management and Billing enables you to define the average price floor and ceil limits of a price item or price item bundle for each division. Before you define the average price floor and ceil limits, you need to specify the floor and ceiling type for the price item or price item bundle. At present, the system supports the following floor and ceiling types for a price item or price item bundle:

- Absolute Value Range

Once the floor and ceiling type of a price item or price item bundle is set to **Absolute Value Range**, you can define the average price floor and ceil limits of the price item or price item bundle for the required divisions. The system enables you to define different average price floor and ceil limits for different To Do roles. The system uses the average price floor and ceil limits while approving the average price of the price item or price item bundle in a deal. The deal creator or an approver at any level in the division or deal approval hierarchy can approve the average price of a price item or price item bundle when the average price is within the floor and ceil limits of the To Do role to which the deal creator or approver belongs. For example, if the average price of the P1 price item in a deal is $25 and the floor and

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ceil limits of the deal creator's To Do role is set to $10-$15, then the deal creator cannot approve the average price of the P1 price item in the deal.

If the average price floor and ceil limits is not defined for the deal creator's or approver's To Do role, the status of the price item or price item bundle in the deal is changed to **Error**. If the average price floor and ceil limits is defined for the deal creator's or approver's To Do role, but the average price of the price item or price item bundle is not within the floor and ceil limits, the status of the price item or price item bundle in the deal is changed to **Pending for Approval**. However, if the average price floor and ceil limits is defined for the deal creator's or approver's To Do role and the average price of the price item or price item bundle is within the floor and ceil limits, the status of the price item or price item bundle in the deal is changed to **Approved**.

Here, you can also define the average price floor and ceil limits for the price item manager's To Do role. Note that the price item manger can approve the average price of the price item or price item bundle in a deal when the average price of the price item or price item bundle is within the floor and ceil limits of the price item manager's To Do role.

- Spread Amount

Once the average price floor and ceil type of a price item or price item bundle is set to **Spread Amount**, the system calculates the average price floor and ceil limits based on the average price and spread amount. The system calculates the average price of the price item or price item bundle. The system searches for the eligible price list in the price assignments assigned to the To Do roles. If a flat pricing is defined in the price assignment, then the system sets the average price to the flat rate. However, if a tiered pricing is defined in the price assignment, the system calculates the average price using the following formula:

Average Price = Price Item Revenue/Price Item Commitments

The system then considers the spread amount specified for the relationship manager's To Do role in the price item. Using the spread amount and average price, the system calculates the average price floor and ceil limit values. The deal creator or an approver at any level in the division or deal approval hierarchy can approve the average price of a price item or price item bundle when the average price is within the floor and ceil limits of the To Do role to which the deal creator or approver belongs. For example, if the spread amount set by you is 10 and the system calculated average price of the P1 price item in a deal is $25 then the system sets the floor and ceil limits of the deal creator's To Do role to $15-$35. In this case the deal creator can approve the average price of the P1 price item in the deal.

The system then checks whether the average price of the price item in the deal is within the derived average price floor and ceil limits. If so, the system changes the status of the price item to **Approved**. However, if the average price of the price item in the deal is not within the derived average price floor and ceil limits, the status of the price item remains as **Pending for Approval**.

- Spread Percentage

Once the average price floor and ceil type of a price item is set to the **Spread Percentage**, the system calculates the average price floor and ceil limits based on the average price and spread percentage. The system calculates the average price of the price item or price item bundle. The system searches for the eligible price list in the price assignments assigned to the To Do roles. If a flat pricing is defined in the price assignment, then the system sets the average price to the flat rate. However, if a tiered pricing is defined in the price assignment, the system calculates the average price using the following formula:

Average Price = Price Item Revenue/Price Item Commitments

The system then considers the spread parentage specified for the relationship manager's To Do role in the price item. Using the spread percentage and average price, the system calculates the average price floor and ceil values. The deal creator or an approver at any level in the division or approver system then checks whether the average price of the price item in the deal is within the derived average price floor and ceil limits of the To Do role to which the deal creator or approver belongs. For example, if the spread percentage set by you is 10 and the system calculated average price of the P1 price item in a deal is $50 then the system sets the floor and ceil limits of the deal creator's To Do role to $45-$55. In this case the deal creator can approve the average price of the P1 price item in the deal.

The system then checks whether the average price of the price item in the deal is within the derived average price floor and ceil limits. If so, the system changes the status of the price item to **Approved**. However, if the average price of the price item in the deal is not within the derived average price floor and ceil limits, the status of the price item remains as **Pending for Approval**.

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Prerequisites

To define the average price floor and ceil limits of a price item or price item bundle for a division, you should have:

- To Do roles and currencies defined in the application
- Price items or price item bundles associated with the division to which the user (i.e. who is performing this action) belongs

Procedure

To define the average price floor and ceil limits of a price item or price item bundle for a division:

1. Click the **Divisions** or **Show All** link in the **Section** pane when you are defining, editing, or copying a price *i*tem or price item bundle.
   The **Divisions** section appears.
2. Click the **Add** (+) icon in the **Average Price Floor and Ceil Limits** column corresponding to the division for *w*hich you want to define the average price floor and ceil limits of the price item or price item bundle.

   The following fields appear in a grid:

Field Name	Field Description	Mandatory (Yes or No)
To Do Role	Used to indicate that users with the specified To Do role can approve the average price of the price item or price item bundle in a deal when it is within the specified floor and ceil limits. **Note:** The **Search** (🔍) icon appears corresponding to the **To Do Role** field. On clicking the **Search** icon, the **To Do Role Search** window appears. On specifying the To Do role, the description of the To Do role appears corresponding to the **To Do Role** field.	Yes (Conditional) **Note:** This field is required while defining the average price floor and ceil limits of the price item or price item bundle for the division.
Floor Value	Used to specify the floor (i.e. lower) limit for the To Do role. The users who belong to the To Do role cannot approve the average price of the price item or price item bundle when it is below the floor limit. **Note:** The floor value cannot be greater than the ceil value. **Note:** This field appear when you select the **Absolute Value Range** option from the **Average Price Floor and Ceil Limits** list for a price item or price item bundle.	Yes (Conditional) **Note:** This field is required while defining the average price floor and ceil limits of the price item or price item bundle for the division.
Ceil Value	Used to specify the ceil (i.e. upper) limit for the To Do role. The users who belong to the To Do role cannot approve the average price of the price item or price item bundle when it is above the ceil limit. **Note:** The ceil value cannot be lower than the floor value.	Yes (Conditional) **Note:** This field is required while defining the average price floor and ceil limits of the price item or price item bundle for the division.

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Field Name	Field Description	Mandatory (Yes or No)
	Note: This field appear when you select the **Absolute Value Range** option from the **Average Price Floor and Ceil Limits** list for a price item or price item bundle.	
Spread Amount	Used to specify the spread amount specified while defining a price item or price item bundle or assigned to a To Do role. **Note:** This field appears when you select the **Spread Amount** option from the **Average Price Floor and Ceil Limits** list for a price item or price item bundle.	Yes (Conditional) **Note:** This field is required while defining the average price floor and ceil limits of the price item or price item bundle for the division.
Spread Percentage	Used to specify the spread percentage specified while defining a price item or price item bundle or assigned to a To Do role. **Note:** This column appears only when you select the **Spread Percentage** option from the **Average Price Floor and Ceil Limits** list for a price item or price item bundle.	Yes (Conditional) **Note:** This field is required while defining the average price floor and ceil limits of the price item or price item bundle for the division.
Floor and Ceil Currency	Used to indicate the currency in which you want to define the floor and ceil limits. The system does the currency conversion when the pricing currency is different from the floor and ceil currency. **Note:** The list includes only those currencies which are already defined in the system.	Yes (Conditional) **Note:** This field is required while defining the average price floor and ceil limits of the price item or price item bundle for the division.

3. Enter the required details in the **Average Price Floor and Ceil Limits** grid.
4. If you want to define the average price floor and ceil limits for more than one To Do role, click the **Add** (+) *i*con and then repeat step 3.

Note: However, if you want to remove the average price floor and ceil limits of a To Do role from the division, click the **Delete** (🗑) icon corresponding to the To Do role.

5. Click **Save**.
   The average price floor and ceil limits of the price item or price item bundle are defined for the division.

Related Topics

For more information on...	See...
How to define a price item or price item bundle	Defining a Price Item or Price Item Bundle on page 782
How to edit a price item or price item bundle	Editing a Price Item or Price Item Bundle on page 829
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Defining a Characteristic for a Price Item or Price Item Bundle

Prerequisites

To define a characteristic for a price item or price item bundle, you should have:

- Characteristic types defined in the application (where the characteristic entity is set to **Price Item**)

Procedure

To define a characteristic for a price item or price item bundle:

1. Click the **Price Item Characteristics** or **Show All** link in the **Section** pane when you are defining, editing, or *c*opying a price item or price item bundle.

   The **Price Item Characteristics** section appears. It contains the following fields in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Effective Date	Used to specify the date from when the characteristic is effective for the price item or price item bundle.	Yes (Conditional) **Note:** This field is required while defining a characteristic for the price item or price item bundle.
Characteristic Type	Used to indicate the characteristic type. **Note:** The list includes only those characteristic types where the characteristic entity is set to **Price Item**.	Yes (Conditional) **Note:** This field is required while defining a characteristic for the price item or price item bundle.
Characteristic Value	Used to specify the value for the characteristic type. **Note:** If you select a predefined characteristic type, the **Search** (🔍) icon appears corresponding to the **Characteristic Value** field. On clicking the **Search** icon, the **Predefined Characteristic Search** window appears. On specifying the value for a predefined characteristic type, the description of the characteristic value appears corresponding to the **Characteristic Value** field.	Yes (Conditional) **Note:** This field is required while defining a characteristic for the price item or price item bundle.

2. Enter the required details in the **Price Item Characteristics** section.
3. If you want to define more than one characteristic for the price item or price item bundle, click the **Add** (+) *i*con and then repeat step 2.

   Note: However, if you want to remove a characteristic from the price item or price item bundle, click the **Delete** (🗑) icon corresponding to the characteristic.

4. Click **Save**.
   The characteristics are defined for the price item or price item bundle.

Related Topics

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How to define a price item or price item bundle	Defining a Price Item or Price Item Bundle on page 782
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Copying a Price Item or Price Item Bundle

Instead of creating a price item or price item bundle from scratch, you can create a new price item or price item bundle using an existing price item or price item bundle. This is possible through copying a price item or price item bundle. On copying a price item or price item bundle, the details including the following are copied to the new price item or price item bundle:

- Parameters and Divisions associated with the price item or price item bundle
- SQIs associated with the price item or price item bundle for the divisions
- Division-specific characteristics of the price item or price item bundle
- Accrual type criteria of the price item or price item bundle for the divisions
- Hierarchy entity to which the price item or price item bundle is associated in the divisions
- Cost of the price item or price item bundle for the divisions
- Average price floor and ceil limits of the price item or price item bundle for the divisions
- Negotiability floor and ceil values of the price item or price item bundle for the required divisions

You can then edit the details, if required.

Prerequisites

To copy a price item or price item bundle, you should have:

- Price item or price item bundle (whose copy you want to create) defined in the application
- Price item or price item bundle (whose copy you want to create) associated with the division to which the user (i.e. who is performing this action) belongs
- Contract types, To Do types, and To Do roles defined in the application
- To Do roles associated with the required To Do type
- Value defined for the **Default Contract Type** option type in the **C1_PRICING** feature configuration

Procedure

To copy a price item or price item bundle:

1. Search for the price item or price item bundle in the **Price Item** screen.
2. In the **Search Results** section, click the **Copy** (⧉) icon in the **Duplicate** column corresponding to the price item *or* price item bundle whose copy you want to create.

   The **Price Item** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details about the price item or price item bundle.
   - **Parameters** - Used to associate a parameter with the price item or price item bundle. These associated parameters are then used for aggregating transactions and/or for defining the price item pricing.

     Note:

     The **Parameters** section appears in the **Price Item** screen when the **Multi Price Parameter** option type of the **C1_PPARM_FLG** feature configuration is set to **True**.

     You cannot associate parameters to the ratio and phantom price item bundles. Therefore, while defining a ratio or phantom price item bundle, the **Parameters** section does not appear in the **Price Item** screen.

   - **Divisions** - Used to associate the price item or price item bundle with one or more divisions. In addition, it enables you to:

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- Associate the service quantity identifiers (SQIs) with the price item or price item bundle for a division
- Define the accrual type criteria of the price item or price item bundle for a division

  Note: This step is not applicable for the health insurance business.
- Associate the price item or price item bundle with a hierarchy entity in an entity hierarchy relationship of a division

  Note: This step is not applicable for the health insurance business.
- Define the cost of the price item or price item bundle for a division

  Note: This step is not applicable for the health insurance business.
- Define the average price floor and ceil limits of the price item or price item bundle for a division

  Note: This step is not applicable for the health insurance business.
- Define the negotiability floor and ceil values of the price item or price item bundle for a division

  Note: This step is not applicable for the health insurance business.
- Define the division-specific characteristics for the price item or price item bundle

- **Price Item Characteristics** - Used to define characteristics (which are applicable across divisions) for the price item or price item bundle.

The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Price Item	Used to specify the price item or price item bundle.	Yes
Description	Used to specify the description for the price item or price item bundle.	Yes
Price Item Usage	Used to indicate whether the price item or price item bundle is available for pricing or pricing and billing. The valid values are: • **Pricing** - Used when you want to define pricing for the price item or price item bundle, but no charges should be created against it in the system. **Note:** This option is not applicable for the health insurance business. • **Pricing and Billing** - Used when you want to define pricing and create charges for the price item or price item bundle in the system.	Yes
Price Item Type	Used to indicate the type of the price item or price item bundle. The valid values are: • **Rate** - Used when you want to create a rate based price item or price item bundle. For example, savings, current, and loan interest services (i.e. price items) are rate based price items.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	Note: This option is not applicable for the health insurance business. • **Fees** - Used when you want to create a fee based price item or price item bundle. For example, debit credit service (i.e. price item) is a fee based price item. **Note:** This field appears when the **Pricing** option is selected from the **Price Item Usage** list. You cannot create a price item bundle when the **Pricing** option is selected from the **Price Item Usage** list and **Rate** option is selected from the **Price Item Type** list. The system automatically sets the price item type of those price items or price item bundles which are available for pricing and billing to **Fees**. Therefore, this field does not appear when the **Pricing and Billing** option is selected from the **Price Item Usage** list.	
Bundle	Used to indicate whether you want to create a price item bundle. The valid values are: • Yes • No **Note:** This field is not applicable for the health insurance business.	Yes
Bundle Type	Used to indicate the type of the price item bundle. If the**Pricing and Billing** option is selected from the **Price Item Usage** list, the valid values are: • Regular Bundle • Phantom Bundle • Ratio Bundle However, if the **Pricing** option is selected from the **Price Item Usage** list and the **Fees** option is selected from the **Price Item Type** list, you can only define a regular price item bundle. Therefore, by default, the value is set to **Regular**.	Yes (Conditional) **Note:** This field is required when you are creating a price item bundle.

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Field Name	Field Description	Mandatory (Yes or No)
	Note: This field appears when the **Yes** option is selected from the **Bundle** list. This field is enabled when the **Pricing and Billing** option is selected from the **Price Item Usage** list and the **Yes** option is selected from the **Bundle** list. You cannot define a price item bundle when the **Pricing** option is selected from the **Price Item Usage** list and **Rate** option is selected from the **Price Item Type** list. This field is not applicable for the health insurance business.	
Global Price List	Used to indicate whether the price item or price item bundle can be assigned to a global price list. The valid values are: • Yes • No	Yes
Contract Type	Used to indicate the contract type that you want to associate with the price item or price item bundle. **Note:** This field appears when the **Pricing and Billing** option is selected from the **Price Item Usage** list. The **Search** (🔍) icon appears corresponding to the **Contract Type** field. On clicking the **Search** icon, the **Contract Type Search** window appears.	Yes
Price Item Manager To Do Type	Used to indicate the To Do type using which a To Do should be created when the deal creator or approver requests the price item manager (i.e. clicks the **Send Price Items for Approval** button) to approve the average price for the price item or price item bundle offered in a deal.	No

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The **Search** (🔍) icon appears corresponding to the **Price Item Manager To Do Type** field. On clicking the **Search** icon, the **To Do Type Search** window appears. On specifying the To Do type, the description of the To Do type appears corresponding to the **Price Item Manager To Do Type** field. This field is not applicable for the health insurance business.	
Price Item Manager To Do Role	Used to indicate that users with the specified To Do role can approve the average price for the price item or price item bundle offered in a deal. Note that the price item manager can approve the average price when it is within the average price floor and ceil limits defined for the To Do role. **Note:** The list appears when the price item manager To Do type is selected from the respective field. It includes only those To Do roles which are associated with the price item manager To Do type. This field is not applicable for the health insurance business.	Yes (Conditional) **Note:** This field is required when the price item manager To Do type is specified for the price item or price item bundle.
Average Price Floor and Ceiling Limits	Used to indicate the manner in which you want to define the average price floor and ceil limits for the price item or price item bundle. The valid value is: • **Absolute Value Range** - Used when you want to define the average price floor and ceil limits in the absolute values. For example, the average price for the price item or price item bundle should be between 10$ to 15$. • **Spread Amount** - Used when you want to define the average floor and ceil limits based on the spread amount. • **Spread Percentage** - Used when you want to define the average floor and ceil limits based on the spread percentage.	Yes (Conditional) **Note:** This field is required when you are defining the average price floor and ceil limits of the price item or price item bundle for a division.

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Field Name	Field Description	Mandatory (Yes or No)
	Note: • Incase of **Spread Amount** and **Spread Percentage** options, the system calculates the average price of a price item and based on the average price and the spread amount or spread percentage, the average floor and ceil limits are derived. • This field is not applicable for the health insurance business.	
Sort Sequence	Used to specify the sequence in which the price item should appear in the price item hierarchy of the deal pricing management module.	No
Variable Price	Used to indicate whether the system inherits the pricing of the price item from the price list while orchestrating a deal in the deal pricing management module. **Note:** If the **Variable Price** option is selected, the pricing offered for a price item to an entity in the deal is overridden when the price list pricing is changed after orchestrating the deal in the system. However, if the **Variable Price** option is not selected, the pricing offered for a price item to an entity in the deal is not overridden when the price list pricing is changed in the system. This enables the relationship manager to create deals for an existing customers, accounts, and prospects where the pricing of the price items are fixed for a particular timeframe.	No

3. Enter the required details in the **Main** section.
4. Associate, edit, or disassociate parameters from the price item or price item bundle, if required.

Note: For each predefined parameter which is associated with the price item or price item bundle, you can define a *s*et of valid predefined parameter values for the price item or price item bundle, if required.

5. Associate or disassociate the price item or price item bundle from the required divisions.
6. Associate or disassociate the SQIs from the price item or price item bundle for the required divisions.
7. Define, edit, or remove the accrual type criteria of the price item or price item bundle from the required divisions.

Note: This step is not applicable for the health insurance business.

8. Associate or disassociate the price item or price item bundle from a hierarchy entity in an entity hierarchy *r*elationship of the required divisions.

Note: This step is not applicable for the health insurance business.

9. Define, edit, or remove the cost of the price item or price item bundle from the required divisions.

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> **Note:** This step is not applicable for the health insurance business.

10. Define, edit, or remove the average price floor and ceil limits of the price item or price item bundle from the *r*equired divisions.

> **Note:** This step is not applicable for the health insurance business.

11. Define, edit or remove the negotiability floor and ceil values of the price item or price item bundle for the *r*equired divisions.

> **Note:** This step is not applicable for the health insurance business.

12. Define, edit, or remove the division-specific characteristics from the price item or price item bundle. if required.
13. Define, edit, or remove characteristics of the price item or price item bundle, if required.
14. Click **Save**.
    The new price item is defined.

> **Note:**
>
> While creating a price item or price item bundle which is available for pricing, the contract type specified in the **Default Contract Type** option type of the **C1_PRICING** feature configuration is automatically associated to the price item or price item bundle.
>
> The system allows you to add a price item to the new price item bundle when:
>
> - Price item and price item bundle (whose copy you are creating) are associated to the same contract type.
> - Price item is associated with the division to which the price item bundle (whose copy you are creating) is associated.
> - Another price item bundle with the same price item, relationship type, and date range combination does not exist in the system.

Related Topics

For more information on...	See...
How to search for a price item or price item bundle	Searching for a Price Item or Price Item Bundle on page 781
How to associate a parameter with a price item or price item bundle	Associating a Parameter with a Price Item or Price Item Bundle on page 789
How to associate a price item or price item bundle with a division	Associating a Price Item or Price Item Bundle with a Division on page 794
How to associate an SQI with a price item or price item bundle for a division	Associating an SQI with a Price Item or Price Item Bundle for a Division on page 796
How to define the accrual type criteria of a price item or price item bundle for a division	Defining the Accrual Type Criteria of a Price Item or Price Item Bundle for a Division on page 800
How to associate a price item or price item bundle with a hierarchy entity in an entity hierarchy relationship of a division	Associating a Price Item or Price Item Bundle with a Hierarchy Entity in an Entity Hierarchy Relationship of a Division on page 802
How to define the cost of a price item or price item bundle for a division	Defining the Cost of a Price Item or Price Item Bundle for a Division on page 804

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For more information on...	See...
How to define the average price floor and ceil limits of a price item or price item bundle for a division	Defining the Average Price Floor and Ceil Values of a Price Item or Price Item Bundle for a Division on page 806
How to define the rate negotiability floor and ceil values of a price item or a price item bundle for a division	Defining the Rate Negotiability Floor and Ceil Values of a Price Item or Price Item Bundle for a Division
How to define a division-specific characteristic for a price item or price item bundle	Defining a Division-Specific Characteristic for a Price Item or Price Item Bundle on page 798
How to define a characteristic for a price item or price item bundle	Defining a Characteristic for a Price Item or Price Item Bundle on page 810
How to set the **C1_PRICING** feature configuration	Setting the C1_PRICING Feature Configuration on page 4464

Viewing the Price Item or Price Item Bundle Details

Procedure

To view the details of a price item or price item bundle:

1. Search for the price item or price item bundle in the **Price Item** screen.
2. In the **Search Results** section, click the link in the **Price Item Information** column corresponding to the price *i*tem or price item bundle whose details you want to view.

   The **Price Item** screen appears. It contains the following zones:

   - Price Item on page 820
   - Price Item Characteristics
   - Parameters on page 821
   - Predefined Parameter Values for Price Item on page 822
   - Divisions on page 823
   - Division-Specific SQIs for Price Item on page 823
   - Division-Specific Characteristics for Price Item on page 824
   - Division-Specific Accrual Type Criteria for Price Item on page 824
   - Division-Specific Hierarchy for Price Item on page 825
   - Division-Specific Cost for Price Item on page 826
   - Division-Specific Negotiability for Price Item
   - Division-Specific Floor and Ceil Values for Price Item on page 826
   - Price Item Relationship on page 827
3. View the basic details of the price item or price item bundle in the **Price Item** zone.
4. View the characteristics of the price item or price item bundle in the **Price Item Characteristics** zone.
5. View the parameters associated with the price item or price item bundle in the **Parameters** zone.
6. View the valid predefined parameter values of the price item or price item bundle in the **Predefined Parameter Values for Price Item** zone.
7. View the divisions to which the price item or price item bundle is associated in the **Divisions** zone.
8. View the SQIs associated with the price item or price item bundle for a division in the **Division-Specific SQIs for Price Item** zone.
9. View the division-specific characteristics of the price item or price item bundle in the **Division-Specific Characteristics for Price Item** zone.

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10. View the accrual type criteria of the price item or price item bundle for a division in the **Division-Specific Accrual Type Criteria for Price Item** zone.

> **Note:** This step is not applicable for the health insurance business.

11. View the hierarchy entity to which the price item or price item bundle is associated in a division in the **Division-Specific Hierarchy for Price Item** zone.

> **Note:** This step is not applicable for the health insurance business.

12. View the cost of the price item or price item bundle for a division in the **Division-Specific Cost for Price Item** zone.

> **Note:** This step is not applicable for the health insurance business.

13. View the average price floor and ceil limits of the price item or price item bundle for a division in the **Division-Specific Floor and Ceil Values for Price Item** zone.

> **Note:** This step is not applicable for the health insurance business.

14. View the negotiability floor and ceil values of the price item or price item bundle for a division in the **Division-Specific Negotiability Floor for Price Item** zone.

> **Note:** This step is not applicable for the health insurance business.

15. View the price items or price item bundles related to the parent price item or price item bundle in the **Price Item Relationship** zone.

> **Note:** This step is not applicable for the health insurance business.

Related Topics

For more information on...	See...
How to search for a price item or price item bundle	Searching for a Price Item or Price Item Bundle on page 781
Price Item screen	Price Item (Used for Viewing) on page 819

Price Item (Used for Viewing)

The **Price Item** screen allows you to view the details of the price item or price item bundle. It also allows you to edit the details of the price item or price item bundle. It contains the following zones:

- Price Item on page 820
- Price Item Characteristics
- Parameters on page 821
- Predefined Parameter Values for Price Item on page 822
- Divisions on page 823
- Division-Specific SQIs for Price Item on page 823
- Division-Specific Characteristics for Price Item on page 824
- Division-Specific Accrual Type Criteria for Price Item on page 824
- Division-Specific Hierarchy for Price Item on page 825
- Division-Specific Negotiability for Price Item
- Division-Specific Cost for Price Item on page 826
- Division-Specific Floor and Ceil Values for Price Item on page 826
- Price Item Relationship on page 827

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Price Item

The **Price Item** zone displays the details of the price item or price item bundle. It contains the following sections:

- **Main** - Displays basic information about the price item or price item bundle. It contains the following fields:

Field Name	Field Description
Price Item	Displays the price item or price item bundle.
Description	Displays the description of the price item or price item bundle.
Price Item Usage	Indicates whether the price item or price item bundle is available for pricing or pricing and billing. The valid values are: • Pricing • Pricing and Billing
Price Item Type	Indicates the type of the price item or price item bundle. The valid values are: • Rate • Fees **Note:** This field appears when the **Pricing** option is selected from the **Price Item Usage** list.
Bundle	Indicates whether the price item is a bundle. The valid values are: • Yes • No
Bundle Type	Indicates the type of the price item bundle. The valid values are: • Phantom • Ratio • Regular **Note:** This field appears when the **Yes** option is selected from the **Bundle** list.
Global Price List	Indicates whether the price item or price item bundle can be assigned to a global price list. The valid values are: • Yes • No
Contract Type	Displays the contract type to which the price item or price item bundle is associated.
Price Item Manager To Do Type	Indicates the To Do type using which a To Do should be created when the deal creator or approver requests the price item manager (i.e. clicks the **Send Price Items for Approval** button) to approve the average price for the price item or price item bundle offered in a deal. **Note:** It has a link. On clicking the link, the **To Do Type** screen appears where you can view the details of the respective To Do type.
Price Item Manager To Do Role	Indicates that users with the specified To Do role can approve the average price of the price item or price item bundle offered in a deal. Note that the price item manager can approve the average price when it is within the average price floor and ceil limits of the To Do role.

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Field Name	Field Description
	Note: It has a link. On clicking the link, the **To Do Role** screen appears where you can view the details of the respective To Do role.
Average Price Floor and Ceil Limits	Indicates the manner in which you want to define the average price floor and ceil limits of the price item or price item bundle. The valid values are: • Absolute Value Range • Spread Amount • Spread Percentage
Sort Sequence	Displays the sequence in which the price item appears in the price item hierarchy of the deal pricing management module.
Variable Price	Indicates whether the system inherits the pricing of the price item from the price list while orchestrating a deal in the deal management module.
	Note: If the **Variable Price** option is selected, the pricing offered for a price item to an entity in the deal is overridden when the price list pricing is changed after orchestrating the deal in the system. However, if the **Variable Price** option is not selected, the pricing offered for a price item to an entity in the deal is not overridden when the price list pricing is changed in the system. This enables the relationship manager to create deals for an existing customers, accounts, and prospects where the pricing of the price items are fixed for a particular timeframe.

- **Record Actions** - The **Record Actions** section contains the following button:

Button Name	Button Description
Edit	Used to edit the details of the price item or price item bundle.

- **Record Information** - The **Record Information** section contains the following field:

Field Name	Field Description
Business Object	Indicates the business object using which the price item or price item bundle is created in the system. In addition, a context menu appears corresponding to this field which helps in navigating to other screens in the application.
	Note: It has a link. On clicking the link, the **Business Object** screen appears where you can view the details of the respective business object.

Related Topics

For more information on...	See...
Price Item screen	Price Item (Used for Viewing) on page 819
How to edit a price item or price item bundle	Editing a Price Item or Price Item Bundle on page 829

Parameters

The **Parameters** zone lists the parameters which are associated with the price item or price item bundle. It contains the following columns:

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Column Name	Column Description
Effective Start Date	Displays the date from when the parameter is associated with the price item or price item bundle.
Effective End Date	Displays the date till when the parameter is associated with the price item or price item bundle.
Parameter	Indicates the parameter which is associated with the price item or price item bundle. **Note:** It has a link. On clicking the link, the **Parameter** screen appears where you can view the details of the respective parameter.
Business Label	Displays the business label of the parameter.
Display Order	Indicates the order in which the parameter and its value should appear in the pricing parameter information string across the application.
Parameter Usage	Indicates whether you can use the parameter for aggregation and/or for defining the price item pricing. The valid values are: • Aggregation • Pricing
Mandatory	Indicates whether the parameter is mandatory while defining the price item pricing.
Priority	Indicates the priority in which optional parameters should be considered while determining best fit price for the price item or price item bundle.

On clicking the **Broadcast** (ᯤ) icon corresponding to a parameter, the **Predefined Parameter Values for Price Item** zone appears where you can view the valid predefined parameter values of the price item or price item bundle.

Related Topics

For more information on...	See...
Price Item screen	Price Item (Used for Viewing) on page 819
Predefined Parameter Values for Price Item zone	Predefined Parameter Values for Price Item on page 822

Predefined Parameter Values for Price Item

The **Predefined Parameter Values for Price Item** zone lists the predefined parameter values which are valid for the price item or price item bundle. It contains the following columns:

Column Name	Column Description
Parameter Value	Displays the predefined parameter value.
Description	Displays the description of the predefined parameter value.

By default, the **Predefined Parameter Values for Price Item** zone does not appear in the **Price Item** screen. It appears when you click the **Broadcast** (ᯤ) icon corresponding to a parameter in the **Parameters** zone.

Related Topics

For more information on...	See...
Price Item screen	Price Item (Used for Viewing) on page 819
Parameters zone	Parameters on page 821

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Divisions

The **Divisions** zone lists the divisions to which the price item or price item bundle is associated. It contains the following column:

Column Name	Column Description
Division	Indicates the division to which the price item or price item bundle is associated.
	Note: It has a link. On clicking the link, the **Division** screen appears where you can view the details of the respective division.

On clicking the **Broadcast** (📡) icon corresponding to a division, the **Division-Specific SQIs for Price Item**, **Division-Specific Characteristics for Price Item**, **Division-Specific Accrual Type Criteria for Price Item**, **Division-Specific Hierarchy for Price Item**, **Division-Specific Cost for Price Item**, **Division-Specific Average Price Floor and Ceil Values for Price Item** and **Division-Specific Negotiability Floor and Ceil Values for Price Item** zones appear.

You can filter the list using the **Division** field available in the **Filter** area. By default, the **Filter** area is hidden. You can view the **Filter** area by clicking the **Filters** (▽) icon in the upper right corner of this zone.

Related Topics

For more information on...	See...
Price Item screen	Price Item (Used for Viewing) on page 819
Division-Specific SQIs for Price Item zone	Division-Specific SQIs for Price Item on page 823
Division-Specific Characteristics for Price Item zone	Division-Specific Characteristics for Price Item on page 824
Division-Specific Accrual Type Criteria for Price Item zone	Division-Specific Accrual Type Criteria for Price Item on page 824
Division-Specific Hierarchy for Price Item zone	Division-Specific Hierarchy for Price Item on page 825
Division-Specific Cost for Price Item zone	Division-Specific Cost for Price Item on page 826
Division-Specific Negotiability Floor and Ceil Values for Price Item zone	Division-Specific Negotiability for Price Item
Division-Specific Floor and Ceil Values for Price Item zone	Division-Specific Floor and Ceil Values for Price Item on page 826

Division-Specific SQIs for Price Item

The **Division-Specific SQIs for Price Item** zone lists the SQIs associated with the price item or price item bundle for the division. It contains the following column:

Column Name	Column Description
SQI	Indicates the SQI associated with the price item or price item bundle for the division.
	Note: It has a link. On clicking the link, the **Service Quantity Identifier** screen appears where you can view the details of the respective SQI.

By default, the **Division-Specific SQIs for Price Item** zone does not appear in the **Price Item** screen. It appears when you click the **Broadcast** (📡) icon corresponding to a division in the **Divisions** zone.

Related Topics

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For more information on...	See...
Price Item screen	Price Item (Used for Viewing) on page 819
Divisions zone	Divisions on page 823

Division-Specific Characteristics for Price Item

The **Division-Specific Characteristics for Price Item** zone lists the characteristics of the price item or price item bundle which are defined for the division. It contains the following columns:

Column Name	Column Description
Effective Date	Displays the date from when the price item or price item bundle characteristic is effective for the division.
Characteristic Type	Indicates the characteristic type. **Note:** It has a link. On clicking the link, the **Characteristic Type** screen appears where you can view the details of the respective characteristic type.
Characteristic Value	Displays the value of the characteristic type.

By default, the **Division-Specific Characteristics for Price Item** zone does not appear in the **Price Item** screen. It appears when you click the **Broadcast** (📡) icon corresponding to a division in the **Divisions** zone.

Related Topics

For more information on...	See...
Price Item screen	Price Item (Used for Viewing) on page 819
Divisions zone	Divisions on page 823

Division-Specific Accrual Type Criteria for Price Item

Note: This topic is not applicable for the health insurance business.

The **Division-Specific Accrual Type Criteria for Price Item** zone lists the accrual type criteria of the price item or price item bundle which is defined for the division. It contains the following column:

Column Name	Column Description
Accrual Type Criteria	Indicates whether the billable charges of the price item should be considered for accrual depending on the accrual criteria specified in the accrual type. The valid values are: • Actual • Historical • Not Applicable

By default, the **Division-Specific Accrual Type Criteria for Price Item** zone does not appear in the **Price Item** screen. It appears when you click the **Broadcast** (📡) icon corresponding to a division in the **Divisions** zone.

Related Topics

For more information on...	See...
Price Item screen	Price Item (Used for Viewing) on page 819

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For more information on...	See...
Divisions zone	Divisions on page 823

Division-Specific Hierarchy for Price Item

Note: This topic is not applicable for the health insurance business.

The **Division-Specific Hierarchy for Price Item** zone lists the following in a tree structure:

- Information string of the hierarchy entity at the first level in the entity hierarchy relationship
- Information string of the hierarchy entities at the subsequent levels in the entity hierarchy relationship
- Information string of the price items which are associated with the hierarchy entities at different levels in the entity hierarchy relationship

For example,

Here, the Cash Management, US (at the first level), Payments, US (at the second level), and Statements, US (at the second level) are the hierarchy entity nodes. And, the ACH Payment, ACH Return, ACH Reversal, Mini Statement, and Yearly Statement are the price item nodes.

Each node in the tree has a link. If you click the link on the hierarchy entity node, the **Hierarchy Entity** screen appears where you can view the details of the respective hierarchy entity. However, if you click the link on the price item node, the **Price Item** screen appears where you can view the details of the respective price item.

It contains the following field:

Field Name	Field Description
Hierarchy	Displays the entity hierarchy relationship code.

In addition, it contains the following buttons:

Button Name	Button Description
Expand All	Used to expand all nodes at once in the entity hierarchy relationship.
Collapse All	Used to collapse all nodes at once in the entity hierarchy relationship.

By default, the **Division-Specific Hierarchy for Price Item** zone does not appear in the **Price Item** screen. It appears when you click the **Broadcast** (⦾) icon corresponding to a division in the **Divisions** zone.

Related Topics

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For more information on...	See...
Price Item screen	Price Item (Used for Viewing) on page 819
Divisions zone	Divisions on page 823

Division-Specific Cost for Price Item

Note: This topic is not applicable for the health insurance business.

The **Division-Specific Cost for Price Item** zone lists the costs of the price item or price item bundle which is defined for the division. It contains the following columns:

Column Name	Column Description
Cost Type	Indicates the type of cost incurred in the division for the price item or price item bundle. The valid values are: • Additional Cost - Fixed • Additional Cost - Variable • Fixed Internal • Fixed Third Party • Variable Internal • Variable Third Party
Cost Value	Displays the cost amount.
Cost Currency	Indicates the currency in which the cost is specified. **Note:** It has a link. On clicking the link, the **Currency** screen appears where you can view the details of the respective currency.

By default, the **Division-Specific Cost for Price Item** zone does not appear in the **Price Item** screen. It appears when you click the **Broadcast** (📡) icon corresponding to a division in the **Divisions** zone.

Related Topics

For more information on...	See...
Price Item screen	Price Item (Used for Viewing) on page 819
Divisions zone	Divisions on page 823

Division-Specific Floor and Ceil Values for Price Item

Note: This topic is not applicable for the health insurance business.

The **Division-Specific Floor and Ceil Values for Price Item** zone lists the average price floor and ceil limits of the price item or price item bundle which are defined for the division. It contains the following columns:

Column Name	Column Description
To Do Role	Indicates that users with the specified To Do role can approve the average price of the price item or price item bundle in a deal when it is within the specified floor and ceil limits.

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Column Name	Column Description
	Note: It has a link. On clicking the link, the **To Do Role** screen appears where you can view the details of the respective To Do role.
Floor Value	Displays the floor (i.e. lower) limit of the To Do role.
	Note: This column appears when the **Absolute Value Range** option is selected for the **Average Price Floor and Ceil Limits** list for a price item or price item bundle.
Ceil Value	Displays the ceil (i.e. upper) limit of the To Do role.
	Note: This column appears when the **Absolute Value Range** option is selected for the **Average Price Floor and Ceil Type** list for a price item or price item bundle.
Floor and Ceil Currency	Indicates the currency in which the average price floor and ceil limits are defined for the price item or price item bundle.
	Note: It has a link. On clicking the link, the **Currency** screen appears where you can view the details of the respective currency.
Spread Amount	Indicates the spread amount specified while defining a price item or price item bundle or assigned to a To Do role.
	Note: This column appears when the **Spread Amount** option is selected for the **Average Price Floor and Ceil Type** list for a price item or price item bundle.
Spread Percentage	Indicates the spread percentage specified while defining a price item or price item bundle or assigned to a To Do role.
	Note: This column appears when the **Spread Percentage** option is selected for the **Average Price Floor and Ceil Type** list for a price item or price item bundle.

By default, the **Division-Specific Floor and Ceil Values for Price Item** zone does not appear in the **Price Item** screen. It appears when you click the **Broadcast** (📡) icon corresponding to a division in the **Divisions** zone.

Related Topics

For more information on...	See...
Price Item screen	Price Item (Used for Viewing) on page 819
Divisions zone	Divisions on page 823

Price Item Relationship

Note: This topic is not applicable for the health insurance business.

The **Price Item Relationship** zone lists the price items or price item bundles which are associated with the parent price item or added to the price item bundle. It contains the following columns:

Column Name	Column Description
Price Item Information	Displays information about the price item or price item bundle.

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Column Name	Column Description
	Note: It has a link. On clicking the link, the **Price Item** screen appears where you can view the details of the respective price item or price item bundle.
Effective Start Date	Displays the date from when the price item or price item bundle is associated with the parent price item or added to the price item bundle.
Effective End Date	Displays the date till when the price item or price item bundle is associated with the parent price item or added to the price item bundle.
Relationship Type	Indicates how the price item or price item bundle is related to the parent price item or price item bundle. The valid values are: • Bundle • Child Price Item • Custom • Denominator • Numerator • Other • Price Item • Product Group • Service • Service Group
Bundle Type	Indicates the type of the price item bundle. The valid values are: • Phantom • Ratio • Regular **Note:** The data appears in this column when the associated price item is a bundle.
Price Item Parameters	Displays the parameters and their values based on which you want to determine pricing for the price item or price item bundle.

Note: Pagination is used to display limited number of records in this zone. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

You can filter the list using various search criteria (such as, **Price Item**, **Description**, **Effective Start Date**, and **Relationship Type**) available in the **Filter** area. By default, the **Filter** area is hidden. You can view the **Filter** area by clicking the **Filters** (▽) icon in the upper right corner of this zone.

You can change the layout of this zone. For more information on how to change the layout, see Changing the Layout on page 4410.

You can associate or disassociate a price item or price item bundle from a parent price item and add or remove a price item or price item bundle from a price item bundle by clicking the **Add/Edit** link in the upper right corner of this zone.

Related Topics

For more information on...	See...
Price Item screen	Price Item (Used for Viewing) on page 819
How to associate a price item or price item bundle with a parent price item	Associating a Price Item or Price Item Bundle with a Parent Price Item

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For more information on...	See...
How to add a price item or price item bundle to a price item bundle	Adding a Price Item or Price Item Bundle to a Price Item Bundle
How to disassociate a price item or price item bundle from a parent price item	Disassociating a Price Item or Price Item Bundle from a Parent Price Item
How to remove a price item or price item bundle from a price item bundle	Removing a Price Item or Price Item Bundle from a Price Item Bundle

Editing a Price Item or Price Item Bundle

Prerequisites

To edit a price item or price item bundle, you should have:

- Contract types, To Do types, and To Do roles defined in the application
- To Do roles associated with the required To Do type
- Value defined for the **Default Contract Type** option type in the **C1_PRICING** feature configuration

Procedure

To edit a price item or price item bundle:

1. Search for the price item or price item bundle in the **Price Item** screen.
2. In the **Search Results** section, click the link in the **Price Item Information** column corresponding to the price *i*tem or price item bundle whose details you want to edit.
   The **Price Item** screen appears.
3. Click the **Edit** button in the **Price Item** zone.

   The **Price Item** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details about the price item or price item bundle.
   - **Parameters** - Used to associate a parameter with the price item or price item bundle. These associated parameters are then used for aggregating transactions and/or for defining the price item pricing.

     Note:

     The **Parameters** section appears in the **Price Item** screen when the **Multi Price Parameter** option type of the **C1_PPARM_FLG** feature configuration is set to **True**.

     You cannot associate parameters to the ratio and phantom price item bundles. Therefore, while defining a ratio or phantom price item bundle, the **Parameters** section does not appear in the **Price Item** screen.

   - **Divisions** - Used to associate the price item or price item bundle with one or more divisions. In addition, it enables you to:
     - Associate the service quantity identifiers (SQIs) with the price item or price item bundle for a division
     - Define the accrual type criteria of the price item or price item bundle for a division

       Note: This step is not applicable for the health insurance business.

     - Associate the price item or price item bundle with a hierarchy entity in an entity hierarchy relationship of a division

       Note: This step is not applicable for the health insurance business.

     - Define the cost of the price item or price item bundle for a division

       Note: This step is not applicable for the health insurance business.

     - Define the average price floor and ceil limits of the price item or price item bundle for a division

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> **Note:** This step is not applicable for the health insurance business.

- Define the negotiability floor and ceil values of the price item or price item bundle for a division

> **Note:** This step is not applicable for the health insurance business.

- Define the division-specific characteristics for the price item or price item bundle

- **Price Item Characteristics** - Used to define characteristics (which are applicable across divisions) for the price item or price item bundle.

The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Price Item	Displays the price item or price item bundle.	Not applicable
Description	Used to specify the description for the price item or price item bundle.	Yes
Price Item Usage	Used to indicate whether the price item or price item bundle is available for pricing or pricing and billing. The valid values are: • **Pricing** - Used when you want to define pricing for the price item or price item bundle, but no charges should be created against it in the system. **Note:** This option is not applicable for the health insurance business. • **Pricing and Billing** - Used when you want to define pricing and create charges for the price item or price item bundle in the system. **Note:** You can change the price item usage of a price item or price item bundle from **Pricing** to **Pricing and Billing**. But, you cannot change the price item usage of a price item or price item bundle from **Pricing and Billing** to **Pricing**.	Yes
Price Item Type	Used to indicate the type of the price item or price item bundle. The valid values are: • **Rate** - Used when you want to create a rate based price item or price item bundle. For example, savings, current, and loan interest services (i.e. price items) are rate based price items. **Note:** This option is not applicable for the health insurance business. • **Fees** - Used when you want to create a fee based price item or price item bundle. For example, debit credit service (i.e. price item) is a fee based price item.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	Note: This field appears when the **Pricing** option is selected from the **Price Item Usage** list. You cannot create a price item bundle when the **Pricing** option is selected from the **Price Item Usage** list and **Rate** option is selected from the **Price Item Type** list. The system automatically sets the price item type of those price items or price item bundles which are available for pricing and billing to **Fees**. Therefore, this field does not appear when the **Pricing and Billing** option is selected from the **Price Item Usage** list.	
Bundle	Used to indicate whether you want to create a price item bundle. The valid values are: • Yes • No **Note:** This field is not applicable for the health insurance business.	Yes
Bundle Type	Used to indicate the type of the price item bundle. If the**Pricing and Billing** option is selected from the **Price Item Usage** list, the valid values are: • Regular Bundle • Phantom Bundle • Ratio Bundle However, if the **Pricing** option is selected from the **Price Item Usage** list and the **Fees** option is selected from the **Price Item Type** list, you can only define a regular price item bundle. Therefore, by default, the value is set to **Regular**.	Yes (Conditional) **Note:** This field is required when you are creating a price item bundle.

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Field Name	Field Description	Mandatory (Yes or No)
	Note: This field appears when the **Yes** option is selected from the **Bundle** list. This field is enabled when the **Pricing and Billing** option is selected from the **Price Item Usage** list and the **Yes** option is selected from the **Bundle** list. You cannot define a price item bundle when the **Pricing** option is selected from the **Price Item Usage** list and **Rate** option is selected from the **Price Item Type** list. This field is not applicable for the health insurance business.	
Global Price List	Used to indicate whether the price item or price item bundle can be assigned to a global price list. The valid values are: • Yes • No	Yes
Contract Type	Used to indicate the contract type that you want to associate with the price item or price item bundle. **Note:** This field appears when the **Pricing and Billing** option is selected from the **Price Item Usage** list. The **Search** (🔍) icon appears corresponding to the **Contract Type** field. On clicking the **Search** icon, the **Contract Type Search** window appears.	Yes
Price Item Manager To Do Type	Used to indicate the To Do type using which a To Do should be created when the deal creator or approver requests the price item manager (i.e. clicks the **Send Price Items for Approval** button) to approve the average price for the price item or price item bundle offered in a deal.	No

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The **Search** (🔍) icon appears corresponding to the **Price Item Manager To Do Type** field. On clicking the **Search** icon, the **To Do Type Search** window appears. On specifying the To Do type, the description of the To Do type appears corresponding to the **Price Item Manager To Do Type** field. This field is not applicable for the health insurance business.	
Price Item Manager To Do Role	Used to indicate that users with the specified To Do role can approve the average price for the price item or price item bundle offered in a deal. Note that the price item manager can approve the average price when it is within the average price floor and ceil limits defined for the To Do role. **Note:** The list appears when the price item manager To Do type is selected from the respective field. It includes only those To Do roles which are associated with the price item manager To Do type. This field is not applicable for the health insurance business.	Yes (Conditional) **Note:** This field is required when the price item manager To Do type is specified for the price item or price item bundle.
Average Price Floor and Ceil Limits	Used to indicate the manner in which you want to define the average price floor and ceil limits for the price item or price item bundle. The valid value is: • **Absolute Value Range** - Used when you want to define the average price floor and ceil limits in the absolute values. For example, the average price for the price item or price item bundle should be between 10$ to 15$. • **Spread Amount** - Used when you want to define the average floor and ceil limits based on the spread amount. • **Spread Percentage** - Used when you want to define the average floor and ceil limits based on the spread percentage.	Yes (Conditional) **Note:** This field is required when you are defining the average price floor and ceil limits of the price item or price item bundle for a division.

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Field Name	Field Description	Mandatory (Yes or No)
	Note: • Incase of **Spread Amount** and **Spread Percentage** options, the system calculates the average price of a price item and based on the average price and the spread amount or spread percentage, the average floor and ceil limits are derived. • This field is not applicable for the health insurance business.	
Sort Sequence	Used to specify the sequence in which the price item should appear in the price item hierarchy of the deal pricing management module.	No
Variable Price	Used to indicate whether the system inherits the pricing of the price item from the price list while orchestrating a deal in the deal pricing management module. **Note:** If the **Variable Price** option is selected, the pricing offered for a price item to an entity in the deal is overridden when the price list pricing is changed after orchestrating the deal in the system. However, if the **Variable Price** option is not selected, the pricing offered for a price item to an entity in the deal is not overridden when the price list pricing is changed in the system. This enables the relationship manager to create deals for an existing customers, accounts, and prospects where the pricing of the price items are fixed for a particular timeframe.	No

4. Modify the required details in the **Main** section.
5. Associate, edit, or disassociate parameters from the price item or price item bundle, if required.

Note:

You can edit the parameter details and remove a parameter from the price item or price item bundle when the parameter or any other parameter from the same date range is not yet used for aggregation or for defining the price item pricing.

You can add a parameter which is used for aggregation, whenever required. However, you can add a parameter which is used for pricing when any other parameter from the same date range is not yet used for aggregation or for defining the price item pricing.

For each predefined parameter which is associated with the price item or price item bundle, you can define a set of valid predefined parameter values for the price item or price item bundle, if required.

6. Associate or disassociate the price item or price item bundle from the divisions, if required.

Note: If the price item or price item bundle is associated to a division to which you do not have access, then the corresponding row in the **Divisions** section is grayed out.

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7. Associate or disassociate the SQIs from the price item or price item bundle for the required divisions.
8. Define, edit, or remove the accrual type criteria of the price item or price item bundle from the required divisions.

> **Note:** This step is not applicable for the health insurance business.

9. Associate or disassociate the price item or price item bundle from a hierarchy entity in an entity hierarchy *r*elationship of the required divisions.

> **Note:** This step is not applicable for the health insurance business.

10. Define, edit, or remove the cost of the price item or price item bundle from the required divisions.

> **Note:** This step is not applicable for the health insurance business.

11. Define, edit, or remove the average price floor and ceil limits of the price item or price item bundle from the *r*equired divisions.

> **Note:** This step is not applicable for the health insurance business.

12. Define, edit or remove the rate negotiability floor and ceil values of the price item or price item bundle for the *r*equired divisions.

> **Note:** This step is not applicable for the health insurance business.

13. Define, edit, or remove the division-specific characteristics from the price item or price item bundle. if required.
14. Define, edit, or remove characteristics of the price item or price item bundle, if required.
15. Click **Save**.
    The changes made to the price item or price item bundle are saved.

Related Topics

For more information on...	See...
How to search for a price item or price item bundle	Searching for a Price Item or Price Item Bundle on page 781
How to associate a parameter with a price item or price item bundle	Associating a Parameter with a Price Item or Price Item Bundle on page 789
How to associate a price item or price item bundle with a division	Associating a Price Item or Price Item Bundle with a Division on page 794
How to associate an SQI with a price item or price item bundle for a division	Associating an SQI with a Price Item or Price Item Bundle for a Division on page 796
How to define the accrual type criteria of a price item or price item bundle for a division	Defining the Accrual Type Criteria of a Price Item or Price Item Bundle for a Division on page 800
How to associate a price item or price item bundle with a hierarchy entity in an entity hierarchy relationship of a division	Associating a Price Item or Price Item Bundle with a Hierarchy Entity in an Entity Hierarchy Relationship of a Division on page 802
How to define the cost of a price item or price item bundle for a division	Defining the Cost of a Price Item or Price Item Bundle for a Division on page 804
How to define the average price floor and ceil limits of a price item or price item bundle for a division	Defining the Average Price Floor and Ceil Values of a Price Item or Price Item Bundle for a Division on page 806
How to define the rate negotiability floor and ceil values for a price item or price item bundle	Defining the Rate Negotiability Floor and Ceil Values of a Price Item or Price Item Bundle for a Division
How to define a division-specific characteristic for a price item or price item bundle	Defining a Division-Specific Characteristic for a Price Item or Price Item Bundle on page 798

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For more information on...	See...
How to define a characteristic for a price item or price item bundle	Defining a Characteristic for a Price Item or Price Item Bundle on page 810
How to set the **C1_PRICING** feature configuration	Setting the C1_PRICING Feature Configuration on page 4464

Price List

A price list allows you to define standard prices for a group of price items. In other words, a price list is a rate card for price items or services which are offered to the accounts or persons. You can create more than one price list. For example, you can create a price list for large, medium-sized, and small customers. You can also create a set of price lists for different regions. You can define two types of price lists - **Standard** and **Promotional**. You can also set eligibility criteria for the price list with effective start date, end date, and description. At present, there is no functionality associated with the price list type. The implementation team can use the price list type to define the custom logic as per the business requirements.

A price list and price item pricing within the price list are effective for a particular duration. You can define multiple pricing for the same price item and variance parameter or product parameters combination within a price list when the price item pricing date range is different. You can assign the same price item in multiple price lists and define different pricing for the price item in each price list based on the business requirements.

The system enables you to specify the duration for which the price list is available for assignment to an account or a person. However, note that at present, the availability start and end dates are not used in the product while assigning a price list to an account or a person. If required, the implementation team can build the custom logic using the availability start and end dates in the product.

Once you create a price list, you have to assign price items to the price list and define pricing for each price item assigned to the price list. The price lists are then assigned to accounts or persons to indicate the prices that will be charged for various price items or services offered to them. You can assign multiple price lists to an account or a person for an overlapping date range. But, you need to specify the priority or order for the price list in which the pricing from the price list should be considered. You can also assign the same price list to multiple accounts or persons.

You can define whether the account or person can avail the price item pricing listed on the parent or grandparent price list if it is not available on the assigned price list. In other words, you can define whether the account or person can inherit price item pricing from the price list hierarchy.

The system allows you to create the following:

- **Default Price List** - You can create a price list and set it as a default price list for a particular division. To define a default price list for a division, you need to set the value for the **Default Price List ID** parameter in the price assignment search algorithm which is attached to the division. If the effective price item pricing is not available at any level in the customer hierarchy, the system checks whether the default price list is specified in the price assignment search algorithm. If the default price list is specified in the algorithm, the system checks whether effective price item pricing is available in the default price list and accordingly uses the price item pricing. You can have the same price list as a the default price list for multiple divisions.
- **Global Price List** - You can create one global price list in the system. It is used when the price item pricing is not available at any level in the customer hierarchy and in the default price list associated with the division. You can assign only those price items in the global price list whose the **Global Price List** option is set to **Yes**. The global price list is used while searching an effective price item pricing when the **Global Price List** parameter in the price assignment search algorithm (attached to the division) is set to **Y**. Finally, if the effective price item pricing is not available in the default and/or global price list, an error message occurs indicating that the effective price item pricing is not available in the system.
- **Template Price List** - You can define a template price list and assign template price item pricing to a template price list. You cannot assign template price list to an account or a person. You can only create a copy of a template price

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item pricing which is assigned to a template price list. Once you create a copy of the template price item pricing, you can save the new price item pricing in either **Active** or **Proposed** status.

Price List (Used for Searching)

The **Price List** screen allows you to search for a price list using various search criteria. It also allows you to define a price list. It contains the following zones:

- Search Price List on page 837
- Price List Price Items on page 840
- Price Item Pricing
- Price Assignment Tree

Through this screen, you can navigate to the following screens:

- Price List Price Item Pricing on page 861
- Price List Assignments on page 907
- Entities Eligible for Price List Assignment on page 909
- Price Item Pricing (Used for Viewing)

Search Price List

The **Search Price List** zone allows you to search for a price list using various search criteria. It contains the following two sections:

- **Search Criteria** - The **Search Criteria** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Search By	Used to indicate whether you want to search for a price list using the price list details. The valid value is: • Price List Details **Note:** By default, the **Price List Details** option is selected.	Yes
Price List ID	Used to search a particular price list.	No
Price List Description	Used to search price lists with a particular description.	No
Effective Start Date	Used to search price lists which are effective from a particular date onwards. **Note:** You can either manually specify the date or select it using the **Date Picker** ( ) icon corresponding to the field.	No
Effective End Date	Used to search price lists which are effective till a particular date. **Note:** You can either manually specify the date or select it using the **Date Picker** ( ) icon corresponding to the field.	No

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Field Name	Field Description	Mandatory (Yes or No)
Price List Type	Used to search price lists which belong to a particular type. The valid values are: • Promotional • Standard **Note:** By default, the **Standard** option is selected.	No
Global Price List	Used to indicate whether you want to search global price lists. The valid values are: • Yes • No	No
Availability Start Date	Used to search price lists which are available for assignment to an account or a person from a particular date. **Note:** This field appears when you click the **Advanced Search** link in the top right corner of this zone.	No
Availability End Date	Used to search price lists which are available for assignment to an account or a person till a particular date. **Note:** This field appears when you click the **Advanced Search** link in the top right corner of this zone. You can either manually specify the date or select it using the **Date Picker** ( ) icon corresponding to the field.	No
Status	Used to search price lists with a particular status. The valid values are: • Active • Inactive • Proposed • Template **Note:** This field appears when you click the **Advanced Search** link in the top right corner of this zone. You can either manually specify the date or select it using the **Date Picker** ( ) icon corresponding to the field.	No
Division	Used to search price lists which are associated with a particular division.	No

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Field Name	Field Description	Mandatory (Yes or No)
	Note: You can only view those divisions to which you have access in the **Division** list.	
Parent Price List	Used to search price lists which inherit pricing from a particular parent price list. **Note:** The **Search** (🔍) icon appears corresponding to this field. On clicking the **Search** icon, the **Price List Search** window appears where you can search for the respective parent price list. This field appears when you click the **Advanced Search** link in the top right corner of this zone.	No
Parent Price List Effective Date	Used to search price lists that inherit pricing from a particular parent price list which is effective from a particular date onwards. **Note:** This field appears when you click the **Advanced Search** link in the top right corner of this zone. You can either manually specify the date or select it using the **Date Picker** (📅) icon corresponding to the field.	No

Note: You must specify at least one search criterion while searching for a price list.

- **Search Results** - On clicking the **Search** button, the search results appear based on the specified search criteria. The **Search Results** section contains the following columns:

Column Name	Column Description
Price List Information	Displays the concatenated string of information about the price list separated by a comma (,). **Note:** It has a link. On clicking the link, the **Price List** screen appears where you can view the details of the respective price list.
Status	Indicates the current status of the price list. The valid values are: • Active • Inactive • Proposed • Template
Effective Start Date	Displays the date from when the price list is effective.
Effective End Date	Displays the date till when the price list is effective.
Availability Start Date	Displays the date from when the price list is available for assignment to an account or a person.

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Column Name	Column Description
Availability End Date	Displays the date till when the price list is available for assignment to an account or a person.
Copy	On clicking the **Duplicate** (⧉) icon, the **Price List** screen appears where you can create a new price list using an existing price list.
Price List Pricing	On clicking the **View** (🔗) icon in the **Price List Pricing** column, the **Price List Price Item Pricing** screen appears where you can view and edit a list of price items pricing information assigned to the price list.
Price List Assigned To	On clicking the **View** (🔗) icon in the **Price List Assigned To** column, the **Price List Assignments** screen appears where you can view the details of the persons and accounts to which the price list is assigned.
Eligible Accounts/Persons	On clicking the **View** (🔗) icon in the **Eligible Accounts/Persons** column, the **Entities Eligible for Price List Assignment** screen appears where you can search for a list of eligible accounts and persons to which you want to assign the price list in a particular division.

Note:

However, when you search for a price list by specifying the date (which can be current, past or future date) in the **Parent Price List Effective Date** field, the system retrieves the price lists that meet the search criteria along with the details of the parent price list that is effective on that date.

Pagination is used to display limited number of records in the **Search Results** section. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

By default, the **Filter** area is visible. You can hide the **Filter** area by clicking the **Filters** (▽) icon in the upper right corner of this zone.

On clicking the **Broadcast** (📡) icon corresponding to the **Price List Information** field, the **Price List Price Items** zone appears where you can view a list of price items to which the price list is assigned.

Related Topics

For more information on...	See...
Price List Price Items zone	Price List Price Items on page 861
How to search for a price list	Searching for a Price List on page 842
How to view price items assigned to a price list	Viewing Price Items Assigned to a Price List on page 843
How to define a price list	Defining a Price List on page 843
How to copy a price list	Copying a Price List on page 852
How to view price list price items and assign price items	Price List Price Item Pricing on page 861
How to view the details of the price list assigned	Price List Assignments on page 907
How to search for eligible accounts and persons to be assigned to the price list.	Entities Eligible for Price List Assignment on page 909

Price List Price Items

The **Price List Price Items** zone lists price items that are assigned to the price list. You will not find any records in this zone if the price list does not have any price items assigned to it. It contains the following columns:

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Column Name	Column Description
Pricing Information	Displays the concatenated string consisting of pricing information and pricing ID which are separated by a comma (,) for the price list. **Note:** It has a link. On clicking the link, the **Price Item Pricing** screen appears where you can view the pricing information of the respective price list.
Price Item	Displays the price item or price item bundle.
Pricing Parameters	Used to specify multiple parameters based on which you want to determine the pricing utilization. **Note:** This column appears only when the **Multi Price Parameter** option type of the **Multi Parameter Based Pricing (C1_PPARM_FLG)** feature configuration is set to **True**.
Pricing Status	Displays the status of pricing for the price item. The valid values are: • Draft • Active • Inactive • Proposed • Rejected • Template • Recommended
Rate Info	Displays the rate of the price item. **Note:** If the price assignment has only one price component, you can view the rate defined in the pricing directly through the **Rate Info** column. However, if the price assignment has more than one price components, then the **Rate Info** column contains a string indicating the tiering type and pricing currency. It also contains "..." which indicates that for more information about the pricing you should navigate to the **Price Item Pricing** screen.
Effective Start Date	Displays the date from when the price item pricing is effective for the price list.
Effective End Date	Displays the date till when the price item pricing is effective for the price list.
Price Assignment Type	Indicates the type of the price item pricing. The valid values are: • Regular • Post Processing • Post Processing - Invoice Based • Post Processing - Price Item Based **Note:** This column appears when the **Multi Price Parameter** option type of the **Multi Parameter Based Pricing (C1_PPARM_FLG)** feature configuration is set to **True**.
Copy	On clicking the **Duplicate** (⧉) icon, the **Price Item Pricing** screen appears where you can define a new price item pricing using an existing price item pricing.

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By default, the **Price List Price Items** zone does not appear in the **Price List** screen. It appears when you click the **Broadcast** (ᯤ) icon corresponding to the price list in the **Search Price List** zone.

You can filter the list using various search criteria (such as, **Price Item** and **Effective Start Date**) available in the **Filter** area. By default, the **Filter** area is hidden. You can view the **Filter** area by clicking the **Filters** (▽) icon in the upper right corner of this zone.

On clicking the **Broadcast** (ᯤ) icon corresponding to the **Pricing Information** field, the **Price Item Pricing** and **Pricing Structure** zones appear where you can view the details about the price item pricing and its structure.

You can change the layout of this zone. For more information on how to change the layout, see Changing the Layout on page 4410.

Related Topics

For more information on...	See...
Search Price List zone	Search Price List on page 837
Price Item Pricing zone	Price Item Pricing
Pricing Structure zone	Price Assignment Tree
How to view price items assigned to a price list	Viewing Price Items Assigned to a Price List on page 843
How to view price item pricing of a price list	Viewing a Price Item Pricing on page 871

Searching for a Price List

Prerequisites

To search for a price list, you should have:

- Divisions defined in the application
- Price list associated with the division to which the user belongs

Procedure

To search for a price list:

1. Click the **Menu** link in the **Application** toolbar.
   A list appears.
2. From the **Main** menu, select **Pricing Management** and then click **Price List**.
   A sub-menu appears.
3. Click the **Search** option from the **Price List** sub-menu.
   The **Price List** screen appears.
4. Enter the search criteria in the **Search Price List** zone.

> **Note:** ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.

5. Click **Search**.
   A list of price lists that meet the search criteria appears in the **Search Results** section.

> **Note:** Pagination is used to display limited number of records in the **Search Results** section. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

Related Topics

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For more information on...	See...
Price List screen	Price List (Used for Viewing) on page 855
Search Price List zone	Search Price List on page 837

Viewing Price Items Assigned to a Price List

Procedure

To view price items assigned to a price list:

1. Search for the price list in the **Price List** screen.
2. In the **Search Results** section, click the **Broadcast** (📡) icon corresponding to the price list *w*hose price items details you want to view.
   The **Price List Price Items** zone appears.
3. View the price items that are assigned to the price list in the **Price List Price Items** zone.

Related Topics

For more information on...	See...
How to search for a price list	Searching for a Price List on page 842
Price List Price Items zone	Price List Price Items on page 840

Defining a Price List

Procedure

To define a price list:

1. Click the **Menu** link in the **Application** toolbar.
   A list appears.
2. From the **Main** menu, select **Pricing Management** and then click **Price List**.
   A sub-menu appears.
3. Click the **Add** option from the **Price List** sub-menu.

   The **Price List** screen appears. It consists the following sections:

   - **Main** - Used to specify basic details about the price list.
   - **Hierarchy** - Used to associate the price list with one or more parent price lists for a particular duration.
   - **Divisions** - Used to associate the price list with one or more divisions.
   - **Eligibility** - Used to define eligibility criteria for the price list.
   - **Characteristics** - Used to define the characteristics for the price list.

   The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Price List Description	Used to specify the description for the price list.	Yes
Effective Start Date	Used to specify the date from when the price list is effective.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	Note: By default, the current date appears in this field. You can either manually specify the date or select it using the **Date Picker** ( ) icon corresponding to the field.	
Effective End Date	Used to specify the date till when the price list is effective. **Note:** The effective end date cannot be earlier than the effective start date. You can either manually specify the date or select it using the **Date Picker** ( ) icon corresponding to the field.	No
Price List Type	Used to indicate the type of the price list. The valid values are: • Standard • Promotional **Note:** By default, the **Standard** option is selected.	Yes
Global Price List	Used to indicate whether the price list is a global price list. The valid values are: • Yes • No	Yes
Availability Start Date	Used to the specify the date from when the price list is available for assignment to an account or a person. **Note:** At present, the availability start date is not used in the price item while assigning a price list to an account or a person. It is available for future use. You can either manually specify the date or select it using the **Date Picker** ( ) icon corresponding to the field.	No
Availability End Date	Used to the specify the date till when the price list is available for assignment to an account or a person.	No

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The availability end date cannot be earlier than the availability start date. At present, the availability end date is not used in the price item while assigning a price list to an account or a person. It is available for future use. You can either manually specify the date or select it using the **Date Picker** ( ) icon corresponding to the field.	
Available for Deal Pricing	Used to indicate whether the price list is available for deal pricing or not.	No
Standard for Deal Pricing	Used to indicate whether the price list is applicable for defining costs or floor and ceil limits or commitments at the time of deal pricing.	No
Validity Period (in Days)	Used to specify the period in days for which the price list is valid. It is used to calculate price list assignment validity end date while assigning the price list to an account or a person.	No
Status	Used to indicate the status of the price list. The valid values are: • **Active** - Used to indicate that the price list can be used for pricing and billing. • **Inactive** - Used to indicate that the price list is no longer available for pricing and billing. • **Proposed** - Used to indicate that the price list is used for quotations. • **Template** - Used to indicate that the price list is a template price list. **Note:** By default, the **Active** option is selected.	Yes

Tip: Alternatively, you can access the **Price List** screen by clicking the **Add** button in the **Page Title** area of the **Price List** screen.

4. Enter the required details in the **Main** section.

Note: By default the **Main** section is displayed.

5. Associate the price list with one or more parent price list, if required.
6. Associate price list with one or more divisions, if required.
7. Define eligibility criteria for the price list, if required.
8. Define characteristics for the price list, if required.
9. Click **Save**.

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Note:

The price list ID is generated automatically when the price list is created.

You can expand all the sections at once by clicking the **Show All** link in the **Section** pane.

Related Topics

For more information on...	See...
Price List screen	Price List (Used for Viewing) on page 855
Price List screen	Price List (Used for Searching) on page 837
How to define the price list hierarchy	Defining the Price List Hierarchy on page 846
How to define a characteristic for a price list	Defining a Characteristic for a Price List on page 847
How to associate a price list with a division	Associating a Price List with a Division on page 849
How to define eligibility criteria for a price list	Defining Eligibility Criteria for a Price List on page 849

Defining the Price List Hierarchy

Prerequisites

To define the price list hierarchy, you should have:

- Parent price lists defined in the application

Oracle Revenue Management and Billing allows you to define the price list hierarchy. It helps you to inherit the price item pricing from the parent price list if the price item pricing is not available in the price list (assigned to the account, person, or parent person). And, if the price item pricing is not available in the parent price list, the system will search for the price item pricing in the parent's parent price list (i.e. in the grandparent price list) and continue till it reaches the last level in the hierarchy.

In other words, when you define the price list hierarchy and assign the price list to an account or a person, the account or person can avail the price item pricing listed on the parent or grandparent price list if it is not available on the assigned price list. However, if the price item pricing is available on both the assigned and parent price lists, the system derives the price item pricing from the assigned price list.

You can define multiple parent price lists for a price list. But, only one parent price list is effective for a particular duration. Two or more price lists can have the same parent price list.

Procedure

To define the price list hierarchy:

1. Click the **Hierarchy** or **Show All** link from the **Section** pane when you are defining, editing, or copying a price list.

   The **Hierarchy** section appears. It contains the following fields in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Parent Price List Effective From Date	Used to specify the date from when the price list inherits pricing from the parent price list. **Note:** You can either manually specify the date or select it using the **Date Picker** ( ) icon corresponding to the field.	Yes (Conditional) **Note:** This field is required when you are associating the price list with a parent price list.
Parent Price List Effective To Date	Used to specify the date till when the price list inherits pricing from the parent price list.	No

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The parent price list effective to date cannot be earlier than the parent price list effective from date and later than price list effective end date. You can either manually specify the date or select it using the **Date Picker** (📅) icon corresponding to the field.	
Parent Price List	Used to specify the parent price list ID to which you want to associate the price list. **Note:** The **Search** (🔍) icon appears corresponding to this field. On clicking the **Search** icon, the **Price List Search** window appears. On specifying the parent price list, the description of the parent price list appears corresponding to the **Parent Price List** field.	Yes (Conditional) **Note:** This field is required when you are associating the price list with a parent price list.

2. Enter the required details in the **Hierarchy** section.

Note: You can search for a price list by clicking the **Search** (🔍) icon corresponding to the **Parent Price List** field.

3. If you want to associate the price list with more than one parent price list, click the **Add** (+) icon corresponding to the parent price list and then repeat *s*tep 2.

Note:

You can associate a price list with multiple parent price lists. But, only one parent price list is effective for a particular duration. Also, while associating a price list with a parent price list, you can only specify a price list which is effective during the specified duration.

If you want to remove a parent price list from the price list hierarchy, click the **Delete** (🗑) icon corresponding to the parent price list.

4. Click **Save**.
The price list is associated with the parent price lists.

Related Topics

For more information on...	See...
How to define a price list	Defining a Price List on page 843
How to edit a price list	Editing a Price List on page 858
How to copy a price list	Copying a Price List on page 852

Defining a Characteristic for a Price List

Prerequisites

To define a characteristic for a price list, you should have:

- Characteristic types defined in the application (where the characteristic entity is set to **Price List**)

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Procedure

To define a characteristics for a price list:

1. Click the **Characteristics** or **Show All** link from the **Section** pane when you are defining, editing, or copying a price list.

   The **Characteristics** section appears. It contains the following fields in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Effective Date	Used to specify the date from when the characteristic is effective for the price list.	Yes (Conditional) **Note:** This field is required when you are defining a characteristic for the price list.
Characteristic Type	Used to indicate the characteristic type. **Note:** The list includes only those characteristic types where the characteristic entity is set to **Price List**.	Yes (Conditional) **Note:** This field is required when you are defining a characteristic for the price list.
Characteristic Value	Used to specify the value for the characteristic type. **Note:** If you select a predefined characteristic type, the **Search** (🔍) icon appears corresponding to the **Characteristic Value** field. On clicking the **Search** icon, the **Predefined Characteristic Search** window appears. On specifying the value for a predefined characteristic type, the description of the characteristic value appears corresponding to the **Characteristic Value** field.	Yes (Conditional) **Note:** This field is required when you are defining a characteristic for the price list.

2. Enter the required details in the **Characteristics** section.
3. If you want to define more than one characteristic for the price list, click the **Add** (+) icon and then repeat *s*tep 2.

   Note: However, if you want to remove a characteristic from the price list, click the **Delete** (🗑) icon corresponding to the characteristic.

4. Click **Save**.
   The characteristics are defined for the price list.

Related Topics

For more information on...	See...
How to define a price list	Defining a Price List on page 843
How to edit a price list	Editing a Price List on page 858
How to copy a price list	Copying a Price List on page 852

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Associating a Price List with a Division

You can assign a price list only to those accounts or persons which belong to the division to which the price list is associated. Therefore, you need to associate the price list with appropriate divisions.

Prerequisites

To associate a price list with a division, you should have:

- Divisions defined in the application

Procedure

To associate a price list with a division:

1. Click the **Divisions** or **Show All** link from the **Section** pane when you are defining, editing, or copying a price list.

   The **Divisions** section appears. It contains the following field in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Division	Used to indicate the division to which you want to associate the price list. **Note:** You can only view those divisions to which you have access in the **Division** list.	No

2. Select the required division from the list.
3. If you want to associate the price list with more than one division, click the **Add** (+) icon corresponding to the division and then repeat step *2*.

   Note: However, if you want to remove the price list from a division, click the **Delete** (🗑) icon corresponding to the division.

4. Click **Save**.
   The price list is associated with the divisions.

   Tip: Alternatively, you can associate a price list with a division using the **Division** screen.

Related Topics

For more information on...	See...
How to define a price list	Defining a Price List on page 843
How to edit a price list	Editing a Price List on page 858
How to copy a price list	Copying a Price List on page 852

Defining Eligibility Criteria for a Price List

Prerequisites

To define eligibility criteria for a price list, you should have:

- Parameters defined in the application where the **Price List Eligibility Criteria** option is selected.

Procedure

To define eligibility criteria for a price list:

1. Click the **Eligibility** or **Show All** link from the **Section** pane when you are defining, editing, or copying a price list.

   The **Eligibility** section appears. It contains the following fields in a grid:

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Column Name	Column Description	Mandatory (Yes or No)
Criteria	On clicking the **Add** (+) icon, you can define an eligibility criteria for a price list. **Note:** This field is required when you are defining an eligibility criteria for the price list.	Yes (Conditional)
Effective Start Date	Used to specify the date from when the criteria is effective for the price list. **Note:** You can either manually specify the date or select it using the **Date Picker** (📅) icon corresponding to the field.	Yes (Conditional) **Note:** This field is required when you are defining an eligibility criteria for the price list.
Effective End Date	Used to specify the date till when the criteria is effective for the price list. **Note:** You can either manually specify the date or select it using the **Date Picker** (📅) icon corresponding to the field.	No
Description	Used to specify the description for the criteria type.	Yes

2. Enter the required details in the **Eligibility** section.
3. If you want to define more than one eligibility criteria for the price list, click the **Add** (+) icon and then *r*epeat step *2*.

Note: However, if you want to remove the eligibility criteria, click the **Delete** (🗑) icon corresponding to the criteria.

4. Click the **Add** (+) icon in the **Criteria** column to associate eligibility criteria of parameters for the price list.

   The following fields appear in a grid:

Column Name	Column Description	Mandatory (Yes or No)
Display Sequence	Used to indicate the order in which the price list eligibility criteria should be executed.	Yes
Parameter	Used to indicate the parameter (on the left hand side) which is used in the pricing eligibility criteria. **Note:** The **Search** (🔍) icon appears corresponding to this field. On clicking the **Search** icon, the **Parameter Search** window appears where you can search for the respective parent price list.	Yes
Operator	Used to specify the relational operator to define the relation between the parameter name and value. The valid values are: • < • <= • <> • = • > • >=	Yes

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Column Name	Column Description	Mandatory (Yes or No)
	• Between • In • Like • Not In	
Parameter Value Type	Used to indicate whether the parameter (on the left hand side) must be compared against another parameter (on the right hand side) or directly against a parameter value. The valid values are: • Parameter • Value	Yes
Parameter	Used to indicate the parameter (on the right hand side) against which you want to compare the parameter (on the left hand side). **Note:** The **Search** (🔍) icon appears corresponding to this field. On clicking the **Search** icon, the **Parameter Search** window appears where you can search for the respective parent price list.	Yes
Parameter Value	Used to indicate the parameter value against which you want to compare the parameter (on the left hand side).	Yes
Is True	Used to indicate what should happen when the condition is true (satisfied). The valid values are: • **Check Next Condition** - Used to indicate that the condition with consecutive sequence number should be executed. • **Rule Is False** - Used to indicate that the action specified in the **Rule False Action** field should be executed • **Rule Is True** - Used to indicate that the action specified in the **Rule True Action** field should be executed.	Yes
Is False	Used to indicate what should happen when the condition is false (not satisfied). The valid values are: • **Check Next Condition** - Used to indicate that the condition with consecutive sequence number should be executed. • **Rule Is False** - Used to indicate that the action specified in the **Rule False Action** field should be executed • **Rule Is True** - Used to indicate that the action specified in the **Rule True Action** field should be executed.	Yes
Is Insufficient	Used to indicate what should happen when the data is insufficient. The valid values are:	Yes

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Column Name	Column Description	Mandatory (Yes or No)
	• **Check Next Condition** - Used to indicate that the condition with consecutive sequence number should be executed. • **Rule Is False** - Used to indicate that the action specified in the **Rule False Action** field should be executed • **Rule Is True** - Used to indicate that the action specified in the **Rule True Action** field should be executed.	

5. Enter the required details for the **Eligibility Criteria Parameters** in the **Eligibility Criteria** section.

Note: You can search for a parameter by clicking the **Search** (🔍) icon appears corresponding to the respective field.

6. If you want to define more than one parameter with eligibility-criteria for the price list, click the **Add** (+) icon *a*nd then repeat step 3.

Note: However, if you want to remove a parameter with eligibility-criteria from the price list, click the **Delete** (🗑) icon corresponding to it.

7. Click **Save**.
The eligibility criteria are defined for the price list.

Related Topics

For more information on...	See...
How to create a price list	Defining a Price List on page 843
How to edit a price list	Editing a Price List on page 858
How to associate eligibility criteria of parameter for a price list	Associating Eligibility Criteria of Parameters for a Price List

Copying a Price List

Instead of creating a price list from scratch, you can create a new price list using an existing price list. This is possible through copying a price list. On copying a price list, the details including the pricing parameters, divisions, characteristics, eligibility criteria, and the assigned price items are copied to the new price list. You can then edit the details, if required.

Prerequisites

To copy a price list, you should have:

- Price list (whose copy you want to create) defined in the application
- Price list (whose copy you want to create) associated with the division to which the user belongs

Procedure

To copy a price list:

1. Search for the price list in the **Price List** screen.
2. In the **Search Results** section, click the **Copy** (📋) icon in the **Copy** column corresponding to the price *l*ist using which you want to define a new price list.

   The **Price List** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details about the price list.

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- **Hierarchy** - Used to define parent price list for the price list for a particular duration.
- **Divisions** - Used to associate price list with one or more divisions.
- **Eligibility Criteria** - Used to define eligibility criteria for price list.
- **Characteristics** - Used to define the characteristics (which are applicable across divisions) for the price list.

The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Price List Description	Used to specify the description for the price list.	Yes
Effective Start Date	Used to specify the date from when the price list is effective **Note:** You can either manually specify the date or select it using the **Date Picker** ( ) icon corresponding to the field.	Yes
Effective End Date	Used to specify the date till when the price list is effective. **Note:** You can either manually specify the date or select it using the **Date Picker** ( ) icon corresponding to the field.	No
Price List Type	Used to indicate the type of the price list. The valid values are: • Standard • Promotional	Yes
Global Price List	Used to Indicate whether the price list is a global price list. The valid values are: • Yes • No	Yes
Availability Start Date	Used to specify the date from when the price list is available for assignment to an account or a person. **Note:** You can either manually specify the date or select it using the **Date Picker** ( ) icon corresponding to the field.	Yes
Availability End date	Used to specify the date till when the price list is available for assignment to an account or a person. **Note:** You can either manually specify the date or select it using the **Date Picker** ( ) icon corresponding to the field.	No
Available for Deal Pricing	Used to indicate whether the price list is available for deal pricing or not.	No
Standard for Deal Pricing	Used to indicate whether the price list is applicable for defining costs or floor and ceil limits or commitments at the time of deal pricing.	No

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Field Name	Field Description	Mandatory (Yes or No)
Validity Period (in Days)	Used to specify the period in days for which the price list is valid. It is used to calculate price list assignment validity end date while assigning the price list to an account or a person.	Yes
Status	Used to indicate the status of the price list. The valid values are: • Active • Inactive • Proposed • Template	Yes
Copy Pricing	Used to indicate whether you want to copy the pricing information to the price list. The valid values are: • All • None	Yes (Conditional)

3. Enter the required details in the **Main** section.
4. Add, edit, or remove the parent price list details, if required.
5. Associate or disassociate the price list from the required divisions.
6. Define, edit, or remove the price list eligibility criteria and parameter eligibility criteria for price list in the, if required.
7. Define, edit, or remove characteristics of the price list, if required.
8. Click **Save**.
   The new price list is defined.

Note:

The price list ID is generated automatically when the price list is defined.

You can expand all the sections at once by clicking the **Show All** link in the **Section** pane.

Related Topics

For more information on...	See...
How to search for a price list	Searching for a Price List on page 842
How to define the price list hierarchy	Defining the Price List Hierarchy on page 846
How to define a characteristic for a price list	Defining a Characteristic for a Price List on page 847
How to associate a price list with a division	Associating a Price List with a Division on page 849
How to define eligibility criteria for the price list	Defining Eligibility Criteria for a Price List on page 849

Viewing the Price List Details

Procedure

To view the details of a price list:

1. Search for the price list in the **Price List** screen.
2. In the **Search Results** section, click the link in the **Price List Information** column corresponding to *t*he price list whose details you want to view.

   The **Price List** screen appears. It contains the following zones:

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- Price List on page 855
- Eligibility Criteria on page 857
- Price List Price Items on page 840
- Price Item Pricing
- Price Assignment Tree

3. View the basic details, hierarchy, divisions, and characteristics of the price list in the **Price List** zone.
4. View the eligibility criteria to which the price list is associated in the **Eligibility Criteria** zone.
5. View the price items that are assigned to the price list in the **Price List Price Items** zone.
6. View the price item pricing assigned to the price list in the **Price Item Pricing** and **Price Assignment Tree** zones.

Related Topics

For more information on...	See...
How to search for a price list	Searching for a Price List on page 842
Price List screen	Price List (Used for Viewing) on page 855

Price List (Used for Viewing)

The **Price List** screen allows you to view the details of a price list. It also allows you to edit a price list. It contains the following zones:

- Price List on page 855
- Eligibility Criteria on page 857
- Price List Price Items on page 840
- Price Item Pricing
- Price Assignment Tree

Price List

The **Price List** zone displays the details of the price list. It contains the following sections:

- **Main** - Displays basic information about the price list. It contains the following fields:

Field Name	Field Description
Price List ID	Displays the price list ID.
Price List Description	Displays the description for the price list.
Effective Start Date	Displays the date from when the price list is effective.
Effective End Date	Displays the date till when the price list is effective.
Price List Type	Indicates the type of the price list. The valid values are: • Standard • Promotional
Global Price List	Indicates whether the price list is a global price list. The valid values are: • Yes • No
Availability Start Date	Displays the date from when the price list is available for assignment to an account or a person.

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Field Name	Field Description
Availability End date	Displays the date till when the price list is available for assignment to an account or a person.
Available for Deal Pricing	Indicates whether the price list can be assigned with a person or an account.
Standard for Deal Pricing	Indicates whether the price list can be considered to compare the average floor and ceil limit with the standard and avergae price of a price item associated with a price lisr.
Validity Period (in Days)	Displays the period in days for which the price list is valid. It is used to calculate price list assignment validity end date while assigning the price list to an account or a person.
Status	Indicates the status of the price list. The valid values are: • **Active** - Indicates that the price list is used for billing. • **Inactive** - Indicates that the price list is no longer used for billing. • **Proposed** - Indicates that the price list is used for quotations. • **Template** - Indicates that the price list is a template price list.

- **Hierarchy** - Lists the parent price list from which the price list has inherited the price item pricing for a particular duration. It contains the following columns:

Column Name	Column Description
Parent Price List	Displays the ID of the parent price list.
Parent Price List Effective From Date	Displays the date from when the price list can inherit pricing from the parent price list.
Parent Price List Effective To Date	Displays the date till when the price list can inherit pricing from the parent price list.

- **Divisions** - Lists the divisions to which the price list is associated. It contains the following column:

Column Name	Column Description
Division	Displays the division to which the price list is associated. **Note:** It has a link. On clicking the link, the **Division** screen appears where you can view the details of the respective division.

- **Characteristics** - Lists the characteristics that are associated with the price list. It contains the following columns:

Column Name	Column Description
Effective Date	Displays the date from when the characteristic is effective for the price list.
Characteristic Type	Displays the characteristic type.
Characteristic Value	Displays the value for the characteristic type.

- **Record Actions** - This section contains the following button:

Button Name	Button Description
Edit	Used to edit the details of the price list.

- **Record Information** - This section contains the following field:

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Field Name	Field Description
Business Object	Indicates the business object using which the price list is created. In addition, a context menu (⊙) appears corresponding to this field which helps in navigating to other screens in the application. **Note:** It has a link. On clicking the link, the **Business Object** screen appears where you can view the details of the respective business object.

Related Topics

For more information on...	See...
Price List screen	Price List (Used for Viewing) on page 855
How to define a price list	Defining a Price List on page 843
How to edit a price list	Editing a Price List on page 858

Eligibility Criteria

The **Eligibility Criteria** zone lists the eligibility criteria of the price list. It contains the following columns:

Field Name	Field Description
Effective Start Date	Displays the date from when the criteria is effective for the price list.
Effective End Date	Displays the date till when the criteria is effective for the price list.
Description	Displays the description for the criteria type.
Sequence	Indicates the order in which the price list eligibility criteria should be executed.
Parameter	Indicates the parameter (on the left hand side) is used in the pricing eligibility criteria. **Note:** It has a link. On clicking the link, the **Parameter** screen appears with the details of the respective parameter.
Operator	Displays the relational operator to define the relation between the parameter name and value. The valid values are: • < • <= • <> • = • > • >= • Between • In • Like • Not In
Parameter Value Type	Indicates whether the parameter (on the left hand side) must be compared against another parameter (on the right hand side) or directly against a parameter value. The valid values are: • Parameter

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Field Name	Field Description
	• Value
Parameter	Indicates the parameter (on the right hand side) against which you want to compare the parameter (on the left hand side).
Parameter Value	Indicates the parameter value against which you want to compare the parameter (on the left hand side).
Is True	Indicates what happens when the condition is true (satisfied). The valid values are: • **Check Next Condition** - Indicates that the condition with consecutive sequence number should be executed. • **Rule Is False** - Indicates that the action specified in the **Rule False Action** field should be executed • **Rule Is True** - Indicates that the action specified in the **Rule True Action** field should be executed.
Is False	Indicates what happens when the condition is false (not satisfied). The valid values are: • **Check Next Condition** - Indicates that the condition with consecutive sequence number should be executed. • **Rule Is False** - Indicates that the action specified in the **Rule False Action** field should be executed • **Rule Is True** - Indicates that the action specified in the **Rule True Action** field should be executed.
Is Insufficient	Indicates what happens when the data is insufficient. The valid values are: • **Check Next Condition** - Indicates that the condition with consecutive sequence number should be executed. • **Rule Is False** - Indicates that the action specified in the **Rule False Action** field should be executed • **Rule Is True** - Indicates that the action specified in the **Rule True Action** field should be executed.

Related Topics

For more information on...	See...
Price List screen	Price List (Used for Viewing) on page 855

Editing a Price List

Procedure

To edit a price list:

1. Search for the price list in the **Price List** screen.
2. In the **Search Results** section, click the link in the **Price List Information** column corresponding to the price list whose details you want to edit.
   The **Price List** screen appears.
3. Click the **Edit** button in the **Price List** zone.

   The **Price List** screen appears. It contains the following sections:

   • **Main** - Used to specify basic details about the price list.

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- **Hierarchy** - Used to define parent price list to inherit price item pricing for the price list for a particular duration.
- **Divisions** - Used to associate price list with one or more divisions.
- **Eligibility Criteria** - Used to define eligibility criteria for the price list.
- **Characteristics** - Used to define the characteristics (which are applicable across divisions) for the price list.

The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Price List Description	Used to specify the description for the price list.	Yes
Effective Start Date	Used to specify the date from when the price list is effective. **Note:** The system will not allow you to change the effective start date when: • There is a price item assigned to the price list on that date. • The price list is assigned to an account or a person on that date. You can either manually specify the date or select it using the **Date Picker** ( ) icon corresponding to the field.	Yes
Effective End Date	Used to specify the date till when the price list is effective. **Note:** The effective end date cannot be earlier than the effective start date. You can either manually specify the date or select it using the **Date Picker** ( ) icon corresponding to the field.	No
Price List Type	Used to indicate the type of the price list. The valid values are: • Standard • Promotional	Yes
Global Price List	Used to indicate whether the price list is a global price list. The valid values are: • Yes • No	Yes
Availability Start Date	Used to the specify the date from when the price list is available for assignment to an account or a person.	No

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Field Name	Field Description	Mandatory (Yes or No)
	Note: At present, the availability start date is not used in the product while assigning a price list to an account or a person. It is available for future use. You can either manually specify the date or select it using the **Date Picker** ( ) icon corresponding to the field.	
Availability End Date	Used to the specify the date till when the price list is available for assignment to an account or a person. **Note:** The availability end date cannot be earlier than the availability start date. At present, the availability end date is not used in the product while assigning a price list to an account or a person. It is available for future use. You can either manually specify the date or select it using the **Date Picker** ( ) icon corresponding to the field.	No
Validity Period (in Days)	Used to specify the period in days for which the price list is valid. It is used to calculate price list assignment validity end date while assigning the price list to an account or a person.	No
Status	Used to indicate the status of the price list. The valid values are: • **Active** - Used to indicate that the price list is used for billing. This value appears when you are editing a proposed price list • **Proposed** - Used to indicate that the price list is used for quotations. • **Template** - Used to indicate that the price list is a template price list. **Note:** You cannot change the status of an active and a template price list.	Yes

4. Modify the details in the **Main** section, if required.

Note: By default the **Main** section is displayed.

5. Add, edit or remove parent price list from the price list hierarchy, if required.
6. Associate or disassociate the price list from the divisions, if required.

Note: You can only view those divisions to which you have access in the **Division** list. If the price list is associated to a division to which you do not have access, then the **Divisions** section is grayed out.

7. Define, edit, or remove eligibility criteria from the price list, if required

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8. Define, edit, or remove characteristics of the price list, if required.
9. Click **Save**.
   The changes made to the price list are saved.

> **Note:** You can expand all the sections at once by clicking the **Show All** link in the **Section** pane.

Related Topics

For more information on...	See...
How to search for a price list	Searching for a Price List on page 842
How to define the price list hierarchy	Defining the Price List Hierarchy on page 846
How to define a characteristic for a price list	Defining a Characteristic for a Price List on page 847
How to associate a price list with a division	Associating a Price List with a Division on page 849
How to define eligibility criteria for the price list	Defining Eligibility Criteria for a Price List on page 849

Price List Price Item Pricing

Once a price list is created, you can either assign a price item to the price list and then define pricing for the price item, or you can copy an existing price item pricing and assign it to the price list. The **Price List Price Item Pricing** screen allows you to:

- View and filter the price items that are assigned to the price list
- Search and assign price items to the price list
- Copy a price item pricing and assign it to the price list

The **Price List Price Item Pricing** screen contains the following zones:

- Price List Price Items on page 861
- Search Price Item or Price Item Pricing on page 863

Price List Price Items

The **Price List Price Items** zone lists the price items that are assigned to the price list. You will not find any records in this zone if the price list does not have any price items assigned to it. It contains the following columns:

Column Name	Column Description
Pricing Information	Displays the concatenated string of information about the price item pricing separated by a comma (,). **Note:** It has a link. On clicking the link, the **Price Item Pricing** screen appears where you can view the details of the respective price item pricing.
Price Item	Displays the price item or price item bundle associated with the price list.
Pricing Parameters	Displays a comma-separated list of parameter values based on which the pricing is defined for the price item. The order in which the parameter values appear in this column is controlled by the display order (which is defined while associating a parameter with a price item).
Pricing Status	Indicates the current status of the price item pricing. The valid values are: • **Active** - Indicates that the price assignment is used for billing. • **Draft** - Indicates that the price assignment is created as a draft.

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Column Name	Column Description
	• **Inactive** - Indicates that the price assignment is no longer used for billing. • **Proposed** - Indicates that the price assignment is to be used for quotations. **Note:** The **Proposed** status indicates that the price assignment is defined for a deal and awaiting approval. • **Rejected** - Indicates that the price assignment is rejected. • **Template** - Indicates that the price assignment is a template price list. • **Recommended** - Indicates that the price assignment is a recommended price assignment. **Note:** The **Recommended** status indicates that the price assignment is recommended for a deal.
Rate Info	Displays the rate of the price item. **Note:** If the price assignment has only one price component, you can view the rate defined in the pricing directly through the **Rate Info** column. However, if the price assignment has more than one price components, then the **Rate Info** column contains a string indicating the tiering type and pricing currency. It also contains "..." which indicates that for more information about the pricing you should navigate to the **Price Item Pricing** screen.
Effective Start Date	Displays the date from when the price item pricing is effective for the price list.
Effective End Date	Displays the date till when the price item pricing is effective for the price list.
Price Assignment Type	Indicates the type of price assignment. The valid values are: • **Post Processing** - Indicates that the pricing is used to generate post processing bill segment. This type of price assignment can be done on usage accounts. The post processing bill segment is generated when you generate the bill for the usage account and not when you bill the usage account through an invoice account. • **Post Processing - Invoice Based** - Indicates that the pricing is used to generate post processing bill segment. This type of price assignment is done on an invoice account, and, as a result, the post processing bill segment is generated on the invoice account. **Note:** This is not applicable for price items which are defined for **Pricing** and where the **Price Item Type** field is set to **Fees**. • **Post Processing - Price Item Based** - Indicates that the pricing is used to generate post processing bill segment. This type of price assignment is done on both invoice and usage accounts, but the post processing bill segment is generated only on the invoice account. • **Regular** - Indicates that the pricing is used to generate regular bill segment.
Edit	On clicking the **Edit** (✎) icon, the **Price Item Pricing** screen appears where you can edit the details of the price item pricing.
Delete	On clicking the **Delete** (🗑) icon, you can remove the price item pricing from the price list.

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Column Name	Column Description
	Note: The **Delete** icon appears in this column only when the price list is not yet assigned to any account or person.

You can filter the list using various search criteria (such as, **Price Item** and **Effective Start Date**) available in the **Filter** area. By default, the **Filter** area is hidden. You can view the **Filter** area by clicking the **Filters** (▽) icon in the upper right corner of this zone.

You can change the layout of this zone. For more information on how to change the layout, see Changing the Layout on page 4410.

Related Topics

For more information on...	See...
How to edit a price item from the price list	Editing a Price Item Pricing of a Price List on page 872
How to remove a price item from the price list	Removing a Price Item from a Price List on page 870

Search Price Item or Price Item Pricing

You can assign a price item or price item bundle to a price list and then define pricing for the price item or price item bundle, or you can copy an existing price item pricing and assign it to a price list. The **Search Price Item or Price Item Pricing** zone allows you to search for a price item pricing which is assigned to an account, person, or price list. You can then create a new price item pricing using an existing price item pricing through copying the price item pricing. Once you create a copy of an existing price item pricing, the new price item pricing is assigned to the price list. On copying a price item pricing, the pricing details including the price components, eligibility and tiering criteria for each price component, and characteristics are copied to the new price item pricing. You can then edit the details, if required.

The system allows you to create a copy of active, proposed, inactive, rejected, and template price item pricing. Once you create the copy of a template price item pricing, you can save the new price item pricing in either **Active** or **Proposed** status.

The **Search Price Item or Price Item Pricing** zone contains the following two sections:

- **Search Criteria** - The **Search Criteria** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Search By	Used to indicate whether you want to search price item, pricing assigned to price list and override pricing for an account, or person. The valid values are: • Price Item Search • Price list Pricing • Account Override Pricing • Person Override Pricing • Standard Product Version • Packaged Product Version • Packaged Product Version-Add On Service	Yes
Price Item	Used to search a particular price item or price item bundle.	No

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Field Name	Field Description	Mandatory (Yes or No)
Description	Used to search price items or price item bundles with a particular description. **Note:** This field appears when you select the **Price Item** option from the **Search By** list.	No
Global Price List	Used to search price items or price item bundles which can be assigned to a global price list. The valid values are: • Yes • No	No
Bundle	Used to indicate whether you want to search for price item bundles. The valid values are: • Yes • No	No
Hierarchy Entity	Used to search for price item pricing for a particular hierarchy entity. **Note:** The **Search** (🔍) icon appears corresponding to this field. On clicking the **Search** icon, the **Hierarchy Entity Search** window appears where you can search for the respective hierarchy entity.	No
Price List ID	Used to search pricing of price items or price item bundles which are assigned to a particular price list. **Note:** This field appears when you select the **Price List Pricing** option from the **Search By** list. The **Search** (🔍) icon appears corresponding to this field. On clicking the **Search** icon, the **Price List Search** window appears where you can search for the respective price list.	No
Effective Start Date	Used to search price item pricing on price lists which are effective from a particular date onwards.	No

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Field Name	Field Description	Mandatory (Yes or No)
	Note: This field appears when you select the **Price List Pricing**, **Account Override Pricing**, or **Person Override Pricing** option from the **Search By** list. You can either manually specify the date or select it using the **Date Picker** ( ) icon corresponding to the field.	
Pricing Status	Used to search price item pricing with a particular status. The valid values are: • Active • Inactive • Draft • Proposed • Rejected • Template • Pending In Approval • Recommended **Note:** This field appears when you select the **Price List Pricing**, **Account Override Pricing**, or **Person Override Pricing** option from the **Search By** list.	No
Effective End Date	Used to search price item pricing on price lists which are effective till a particular date. **Note:** This field appears when you select the **Price List Pricing**, **Account Override Pricing**, or **Person Override Pricing** option from the **Search By** list. You can either manually specify the date or select it using the **Date Picker** ( ) icon corresponding to the field.	No
Price Assignment Type	Used to search a particular type of the price item pricing. The valid values are: • Regular • Post Processing • Post Processing - Invoice Based • Post Processing - Price Item Based	No

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Field Name	Field Description	Mandatory (Yes or No)
	Note: This field appears when you select the **Price List Pricing**, **Account Override Pricing**, or **Person Override Pricing** option from the **Search By** list.	
Account ID	Used to search pricing of price items or price item bundles which are assigned to a particular account. **Note:** This field appears when you select the **Account Override Pricing** option from the **Search By** list.	Yes
Person ID	Used to search pricing of price items or price item bundles which are assigned to a particular person. **Note:** This field appears when you select the **Person Override Pricing** option from the **Search By** list.	Yes
Product Code	Used to search for the pricing of price items for a particular product. **Note:** The **Search** (🔍) icon appears corresponding to this field. On clicking the **Search** icon, the **Product Search** window appears where you can search for the respective product. This field appears when you select the **Standard Product Version**, **Packaged Product Version**, or **Packaged Product Version-Add On Service** option from the **Search By** list.	Yes
Effective Date	Used to search price item pricing on price lists which are effective from a particular date. **Note:** You can either manually specify the date or select it using the **Date Picker** (📅) icon corresponding to the field. This field appears when you select the **Standard Product Version**, **Packaged Product Version**, or **Packaged Product Version-Add On Service** option from the **Search By** list.	No

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Note:

You must specify at least one search criterion while searching for a price item or price item bundle.

You can search for an account, person by clicking the **Search** (🔍) icon corresponding to the respective field.

- **Search Results** - On clicking the **Search** button, the search results appear based on the specified search criteria. The search results include only those price items or price item bundles that are associated with the division to which the price list belongs. It may also include price items or price item bundles that are already assigned to the price list in case those price items or price item bundles match the search criteria.

  The **Search Results** section contains the following columns:

Column Name	Column Description
Assign	On clicking the **Assign** (✎) icon, the **Price Item Pricing** screen appears where you can define a new price item pricing.
Price Item Information	Displays details of the price item or price item bundle.
	Note: It has a link. On clicking the link, the **Price Item** screen appears where you can view the details of the respective price item or price item bundle.
Copy	On clicking the **Copy** (⧉) icon, the **Price Item Pricing** screen appears where you can define a new price item pricing using an existing price item pricing.
Pricing Information	Displays details of the price item pricing.
	Note: It has a link. On clicking the link, the **View Price Item Pricing** window appears with the details of the respective price item pricing.
Account Information	Indicates the account to which the price item pricing is assigned. In addition, this column has a context menu which helps in navigating to other screens in the application.
	Note: This column appears when you select the **Account Override Pricing** option from the **Search By** list. It has a link. On clicking the link, the **Account** screen appears where you can view the details of the respective account. The account information string appears when an algorithm defined using the **C1-AC-INFO** algorithm type is attached to the **Account Information** system event in the **Algorithms** tab of the **Installation Options - Framework** screen.
Person Information	Indicates the person to which the price item pricing is assigned. In addition, this column has a context menu which helps in navigating to other screens in the application.

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Column Name	Column Description
	Note: This column appears only when you select the **Person Override Pricing** option from the **Search By** list. It has a link. On clicking the link, the **Person** screen appears where you can view the details of the respective person. The person information string appears when an algorithm defined using the **PERS-INFO** algorithm type is attached to the **Person Information** system event in the **Algorithms** tab of the **Installation Options - Framework** screen.
Price List Information	Indicates the price list to which the price item pricing is assigned. In addition, this column has a context menu which helps in navigating to other screens in the application.
	Note: This column appears when you select the **Price List Pricing** option from the **Search By** list. It has a link. On clicking the link, the **Price List** screen appears where you can view the details of the respective person.
Variance Parameter	Indicates the variance parameter which is used for defining the price item pricing.
	Note: This column appears when the **Multi Price Parameter** option type of the **Multi Parameter Based Pricing (C1_PPARM_FLG)** feature configuration is set to **False**.
Pricing Parameters	Displays a comma-separated list of parameter values. The order in which parameter values appear in this column is controlled by the display order (which is defined while associating a parameter with a price item or price item bundle).
	Note: This column appears when the **Multi Price Parameter** option type of the **Multi Parameter Based Pricing (C1_PPARM_FLG)** feature configuration is set to **True**.
Effective Start Date	Displays the date from when the price item pricing is effective.
Effective End Date	Displays the date till when the price item pricing is effective.
Pricing Currency	Indicates the currency in which the price item pricing is defined.
Pricing Status	Indicates the status of the price item pricing. The valid values are: • Active • Inactive • Proposed • Rejected • Template • Recommended
Rate Schedule	Indicates the rate schedule which is used for defining the price item pricing.
Price Assignment Usage	Indicates whether the price item pricing is applicable to all customers or only to new customers. The valid values are: • AC • NC

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Column Name	Column Description
Price Assignment Type	Indicates the type of the price item pricing. The valid values are: • Regular • Post Processing • Post Processing - Invoice Based • Post Processing - Price Item Based **Note:** This column appears when the **Multi Price Parameter** option type of the **Multi Parameter Based Pricing (C1_PPARM_FLG)** feature configuration is set to **False**.
Price Item	Displays the price item or price item bundle code. **Note:** It has a link. On clicking the link, the **Price Item Pricing** screen appears where you can define the pricing for the respective price item or price item bundle.
Description	Displays the description of the price item or price item bundle.
Global Price List	Indicates whether the price item or price item bundle can be assigned to a global price list. The valid values are: • Y • N
Unit of Measure	Indicates the unit of measure associated with the price item or price item bundle.
Bundle	Indicates whether the price item is a bundle or not. The valid values are: • Y • N
Owner ID	Displays the ID of the person for whose account the price list is created.
Party ID	Displays the third party ID.
Price List ID	Indicates the price list to which the price item pricing is assigned. **Note:** This column appears when you select the **Price List Pricing** option from the **Search By** list.
Price Assignment ID	Displays the price assignment ID.
Price Assignment Owner Type Flag	Displays whether price list or party is the owner of the price assignment.
Bundle Type	Indicates the type of the price item bundle. If the price item bundle is available for pricing and billing, the valid values are: • Phantom • Ratio • Regular However, if the price item bundle is available for only pricing and the price item type is **Fees** then the valid value is **Regular**. **Note:** This column appears when you select the **Yes** option from the **Bundle** list.
Price Item Type	Indicates the type of the price item or price item bundle. The valid values are: • Rate

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Column Name	Column Description
	• Fees

Related Topics

For more information on...	See...
How to view price item pricing	Viewing a Price Item Pricing on page 871
How to assign a price item to a price list	Assigning a Price Item to a Price List on page 877
Price Item Pricing screen	Price Item Pricing (Used for Viewing)
How to copy a price item pricing and assign it to a price list	Copying a Price Item Pricing
How to view price items assigned to a price list	Viewing Price Items Assigned to a Price List on page 870

Viewing Price Items Assigned to a Price List

Procedure

To view price items assigned to a price list:

1. Search for the price list in the **Price List** screen.
2. In the **Search Results** section, click the **View** (🔗) icon from the **Price Item Pricing** column corresponding to the price list whose price items you want to view.
   The **Price List Price Item Pricing** screen appears.
3. View the price items that are assigned to the price list in the **Price List Price Items** zone.

Related Topics

For more information on...	See...
How to search for a price list	Searching for a Price List on page 842
Price List Price Item Pricing screen	Price List Price Item Pricing on page 861
Price List Price Items zone	Price List Price Items on page 861

Removing a Price Item from a Price List

Procedure

To remove a price item from a price list:

1. Search for the price list in the **Price List** screen.
2. In the **Search Results** section, click the **View** (🔗) icon corresponding to the price list from which you want to remove a price item.
   The **Price List Price Item Pricing** screen appears.
3. Filter the list in the **Price List Price Items** zone, if required.
4. Click the **Delete** (🗑) icon in the **Delete** column corresponding to the price item that you want to remove from the price list.

   A message appears confirming whether you want to remove the price item from the price list.

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> **Note:** The **Delete** icon appears in the **Delete** column when the price list is not yet assigned to any account or person.

5. Click **OK**.
   The price item is removed from the price list.

Related Topics

For more information on...	See...
How to search for a price list	Searching for a Price List on page 842

Viewing a Price Item Pricing

Procedure

To view a price item pricing and assignment details:

1. Do either of the following:

If you want to view...	Then...
Price Item Pricing of a Price List from the Price List screen	**a.** Search for the price list in the **Price List** screen. **b.** In the **Search Results** section, click the **Broadcast** (((•))) icon corresponding to the price list whose price item pricing you want to view. The **Price List Price Item** zone appears. **c.** Click the link in the **Pricing Information** column corresponding to the price item whose price item pricing you want to view.
	Tip: Alternatively, you can click on the **Broadcast** (((•))) icon corresponding to the price list whose price item pricing you want to view. The **Price Item Pricing** zone appears in the **Price List** screen.
Price Item Pricing of a Price List from the Price List Price Item Pricing screen	**a.** Search for the price list in the **Price List** screen. **b.** In the **Search Results** section, click the **View** (🔗) icon corresponding to the price list whose details you want to view. The **Price List Price Item Pricing** screen appears. **c.** Price assignments effective for the price list appears in the **Price List Price Item** zone. **d.** Click the link in the **Pricing Information** column corresponding to the price list whose pricing details you want to view.

2. View the basic details of price item pricing in the **Price Item Pricing** zone.
3. View the details about the rate components and its price components for the price item along with the tiering criteria and pricing eligibility details in the **Price Assignment Tree** zone.

Related Topics

For more information on...	See...
How to search for a price list	Searching for a Price List on page 842
Price List Price Item Pricing screen	Price List Price Item Pricing on page 861
Price List Price Items zone	Price List Price Items on page 840
Price Item Pricing screen	Price Item Pricing (Used for Viewing)
Price Item Pricing zone	Price Item Pricing

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For more information on...	See...
Rate and Price Component Summary zone	Rate and Price Component Summary
Rate Components zone	Rate Components
Price Components zone	Price Component
Tiering Criteria zone	Tiering Criteria
Pricing Eligibility Criteria zone	Pricing Eligibility Criteria

Editing a Price Item Pricing of a Price List

Prerequisites

To edit a price item pricing of a price list, you should have:

- Transactions mapped to the price item defined in the application
- Rate schedules, rate versions, rate components defined in the application
- Parameters associated with the price item (in case you want to define price item pricing based on those parameters)

Procedure

To edit a price item pricing of a price list:

1. Do either of the following:

If you want to...	Then...
Edit pricing of a price item that is assigned to a price list from Price List screen	**a.** Search for the price list in the **Price List** screen. **b.** In the **Search Results** section of **Price List Price Items** zone, click the link in the **Pricing Information** column corresponding to the price item whose pricing details you want to view. The **Price Item Pricing** screen appears. **c.** Click the **Edit** button in the **Record Actions** section. The **Price Item Pricing** screen appears to edit the pricing details of a price item. **Note:** The **Edit** button appears when the price item pricing is in the **Draft** status.
Edit pricing of a price item that is assigned to a price list from Price List Price Item Pricing screen	**a.** Search for the price list in the **Price List** screen. In the **Search Results** section, click the **Price List Pricing** (🔗) icon corresponding to the price list whose *d*etails you want to view. The **Price List Price Item Pricing** screen appears. **b.** Price items assigned to the price list appears in the **Price List Price Items** zone. **c.** You can edit the pricing item pricing through the following alternatives: **1.** First alternative, • In the **Search Results** section of **Price List Price Items** zone, click the **Edit** (✎) icon in the **Edit** column corresponding to the price item pricing whose details you want to edit. The **Price Item Pricing** screen appears to edit the pricing details of a price item. **2.** Second alternative,

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If you want to...	Then...
	• Search for a price item in the **Search Price Item or Price Item Pricing** zone. In the **Search Results** section, click the **Assign** ( ) icon corresponding to the price item. • Enter the required details in the **Price Item Pricing** screen and click **Save**. The **Price Item Pricing** screen appears. • Click the **Edit** button in the **Record Actions** section. The **Price Item Pricing** screen appears to edit the pricing details of a price item. **Note:** The **Edit** button appears when the price item pricing is in the **Draft** status.

The **Price Item Pricing** screen appears. It contains the following sections:

- **Main** - Used to specify basic details about the price item pricing.
- **Deal Information** - Used to indicate the average price floor and ceil type to define the floor and ceil *l*imits for the price item or price item bundle
- **TFM Information** - Used to specify the transaction feed management information about the price item pricing.

Note: This section appears in the **Price Item Pricing** screen when the value for the **Show Default Values in Price Item Pricing** option type for **C1_FM** feature configuration is set to **Y** and **Price Item Available For** is **Pricing and Billing**.

- **Characteristics** - Used to define the characteristics for the price item pricing.
- **Price Item and Parameter Information** - Used to define the parameter details segment for the price item pricing.

Note: This section appears when **Price Assignment Type** is **Regular**.

- **Commitments** - Used to indicate the basic details about the pricing and commitments such as costs, floor and ceil limits, and negotiability specific to a division.

The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Start Date	Used to specify the date from when the price item pricing is effective. **Note:** The effective start date cannot be later than the effective end date. If you change the effective start and end dates while editing a price item pricing, you need to specify the parameters which are effective during that date range. This field will be in read-only mode when the price assignment has been used. You can either manually specify the date or select it using the **Date Picker** ( ) icon corresponding to the field.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
End Date	Used to specify the date till when the price item pricing is effective. **Note:** The effective end date cannot be earlier than the effective start date.	No
Price Assignment Type	Used to indicate the type of price assignment. The valid values are: • **Regular** - Used to indicate that the pricing must be used to generate regular bill segment. • **Post Processing** - Used to indicate that the pricing must be used to generate post processing bill segment. This type of price assignment can be done on usage accounts. The post processing bill segment is generated when you generate the bill for the usage account and not when you bill the usage account through an invoice account. **Note:** The post processing bill segment is generated when the **Post Processing Sequence (PPSEQ)** characteristic is defined for the price item and when the price item is associated with another price item using the **Price Item** relationship type. • **Post Processing - Invoice Based** - Used to indicate that the pricing must be used to generate post processing bill segment. This type of price assignment can be done on an invoice account, and, as a result, the post processing bill segment is generated on the invoice account. **Note:** This will not be applicable for price item which are defined for **Only Pricing**. • **Post Processing - Price Item Based** - Used to indicate that the pricing must be used to generate post processing bill segment. This type of price assignment can be done on both invoice and usage accounts, but the post processing bill segment is generated only on the invoice account. **Note:** This will not be applicable for price item which are defined for **Only Pricing**.	Yes
Pricing Eligibility	Used to select pricing eligibility criteria for price item pricing. **Note:** This field will be enabled for selection if the checkbox is not selected. If the checkbox appears selected then this field will be in read-only mode.	No
Pricing Status	Used to indicate the status of the price assignment. The valid values are: • **Draft** - Indicates that the price assignment is created as a draft. • **Active** - Indicates that the price assignment is used for billing.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	• **Inactive** - Indicates that the price assignment is no longer used for billing. • **Proposed** - Indicates that the price assignment is to be used for quotations. **Note:** The **Proposed** status indicates that the price assignment is defined for a deal and awaiting approval. • **Template** - Indicates that the price assignment is a template price list. • **Recommended** - Indicates that the price assignment is a recommended price assignment. **Note:** The **Recommended** status indicates that the price assignment is recommended for a deal. **Note:** If a price assignment is in **Active** status, you can change its status to **Inactive**. If a price assignment is in **Draft** status, you cannot change its status to **Proposed**.	
Pricing Currency	Used to indicate the currency in which you want to define the price item pricing.	Yes
Rate Schedule	Used to specify the rate schedule that you want to use while defining price item pricing. **Note:** Rate schedules control how the bills for the price item will be calculated. The **Search** (🔍) icon appears corresponding to this field. On clicking the **Search** icon, the **Rate Schedule Search** screen appears.	Yes
Pricing Rule Type	Used to indicate the pricing rule type. The valid value is: • Two-Dimensional	Yes (Conditional) **Note:** This field is required when you are editing a two-dimensional pricing rule.
Print Zero	Used to indicate whether zero pricing should be displayed in the bill. The valid values are: • Yes • No **Note:** By default, **Yes** is selected.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
Price Assignment Usage	Used to indicate whether the price item pricing is applicable to all customers or only to new customers. The valid values are: • All Customers • New Customers	Yes
Pricing Frequency	Used to indicate pricing frequency for the price item. **Note:** This field appears when **Price Item** is defined as **Only Pricing** and **Price Item Type** is defined as **Fees**.	Yes

2. Modify the details in the **Main** section, if required.

Note:

If you change the effective start and end dates while editing a price item pricing, you need to specify the parameters which are effective during that date range.

While editing a price item pricing, you can not only edit the existing tiering combination details, but also add additional tiering combinations until the maximum tiering combinations limit is met.

You can search for price item parameter, rate schedule and parameter code by clicking the **Search** (🔍) icon corresponding to the respective fields.

3. Edit the deal information in a price item pricing, if required.
4. Edit the TFM information in a price item pricing, if required.
5. Edit the characteristics for a price item pricing, if required.
6. Edit the parameters for a price item pricing, if required.
7. Edit the pricing commitments, if required.
8. Click **Save**.
   The changes made to the price item pricing are saved.

Related Topics

For more information on...	See...
Price List Price Item Pricing screen	Price List Price Item Pricing on page 861
Price List Price Items zone	Price List Price Items on page 840
How to search for a price list	Searching for a Price List on page 842
How to define a price item pricing.	Defining a Price Item Pricing
How to define a characteristic for a price item pricing.	Defining a Characteristic for a Price Item Pricing on page 881
How to define parameters for a price item pricing.	Defining a Parameter for a Price Item Pricing on page 882
How to define TFM Information in a price item pricing.	Defining TFM Information in a Price Item Pricing on page 884
How to define a division-specific cost of a price item in the price item pricing	Defining the Division-Specific Cost of a Price item in the Price Item Pricing
How to define a division-specific average price limit of a price item in the price item pricing	Defining the Division-Specific Average Price Limits of a Price item in the Price Item Pricing
How to define a division-specific rate negotiability limit of a price item in the price item pricing	Defining the Division-Specific Rate Negotiability Limits of a Price item in the Price Item Pricing

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Assigning a Price Item to a Price List

Prerequisites

To assign a price item to a price list, you should have:

- Transactions mapped to the price item defined in the application
- Rate schedules, rate versions, and rate components defined in the application
- Parameters associated with the price item (in case you want to define price item pricing based on multiple parameters)

Procedure

To assign a price item to a price list:

1. Do either of the following:

If you want to...	Then...
Define pricing of a price item that is assigned to a price list from Price List screen	**a.** Search for the price list in the **Price List** screen. **b.** In the **Search Results** section of **Price List Price Items** zone, click the link in the **Pricing Information** column corresponding to the price item whose pricing details you want to view. The **Price Item Pricing** screen appears. **c.** Click the **Edit** button in the **Record Actions** section. The **Price Item Pricing** screen appears to edit the pricing details of a price item. **Note:** The **Edit** button appears when the price item pricing is in the **Draft** status.
Define pricing of a price item that is assigned to a price list from Price List Price Item Pricing screen	**a.** Search for the price list in the **Price List** screen. In the **Search Results** section, click the **Price List Pricing** (🔗) icon corresponding to the price list whose *d*etails you want to view. The **Price List Price Item Pricing** screen appears. **b.** Price items assigned to the price list appears in the **Price List Price Items** zone. **c.** You can edit the pricing item pricing through the following alternatives: **1.** First alternative, • In the **Search Results** section of **Price List Price Items** zone, click the **Edit** (🔗) icon in the **Edit** column corresponding to the price item pricing whose details you want to edit. The **Price Item Pricing** screen appears to edit the pricing details of a price item. **2.** Second alternative, • Search for a price item in the **Search Price Item or Price Item Pricing** zone. In the **Search Results** section, click the **Assign** (✔) icon corresponding to the price item.

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If you want to...	Then...
	• Enter the required details in the **Price Item Pricing** screen and click **Save**. The **Price Item Pricing** screen appears. • Click the **Edit** button in the **Record Actions** section. The **Price Item Pricing** screen appears to edit the pricing details of a price item. **Note:** The **Edit** button appears when the price item pricing is in the **Draft** status.

The **Price Item Pricing** screen appears. It contains the following sections:

- **Main** - Used to specify basic details about the price item pricing.
- **Deal Information** - Used to indicate the average price floor and ceil type to define the floor and ceil *l*imits for the price item or price item bundle
- **TFM Information** - Used to specify the transaction feed management information about the price item pricing.

  Note: This section appears in the **Price Item Pricing** screen when the value for the **Show Default Values in Price Item Pricing** option type for **C1_FM** feature configuration is set to **Y** and **Price Item Available For** is **Pricing and Billing**.
- **Characteristics** - Used to define the characteristics for the price item pricing.
- **Price Item and Parameter Information** - Used to define the parameter details segment for the price item pricing.

  Note: This section appears when **Price Assignment Type** is **Regular**.
- **Commitments** - Used to indicate the basic details about the pricing and commitments such as costs, floor and ceil limits, and negotiability specific to a division.

The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Start Date	Used to specify the date from when the price item pricing is effective. **Note:** The effective start date cannot be later than the effective end date. If you change the effective start and end dates while editing a price item pricing, you need to specify the parameters which are effective during that date range. This field will be in read-only mode when the price assignment has been used.	Yes
End Date	Used to specify the date till when the price item pricing is effective. **Note:** The effective end date cannot be earlier than the effective start date.	No

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Field Name	Field Description	Mandatory (Yes or No)
Price Assignment Type	Used to indicate the type of price assignment. The valid values are: • **Regular** - Used to indicate that the pricing must be used to generate regular bill segment. • **Post Processing** - Used to indicate that the pricing must be used to generate post processing bill segment. This type of price assignment can be done on usage accounts. The post processing bill segment is generated when you generate the bill for the usage account and not when you bill the usage account through an invoice account. **Note:** The post processing bill segment is generated when the **Post Processing Sequence (PPSEQ)** characteristic is defined for the price item and when the price item is associated with another price item using the **Price Item** relationship type. • **Post Processing - Invoice Based** - Used to indicate that the pricing must be used to generate post processing bill segment. This type of price assignment can be done on an invoice account, and, as a result, the post processing bill segment is generated on the invoice account. **Note:** This will not be applicable for price item which are defined for **Only Pricing**. • **Post Processing - Price Item Based** - Used to indicate that the pricing must be used to generate post processing bill segment. This type of price assignment can be done on both invoice and usage accounts, but the post processing bill segment is generated only on the invoice account. **Note:** This will not be applicable for price item which are defined for **Only Pricing**.	Yes
Pricing Eligibility	Used to select pricing eligibility criteria for price item pricing. **Note:** This field will be enabled for selection if the checkbox is not selected. If the checkbox appears selected then this field will be in read-only mode.	No
Pricing Status	Used to indicate the status of the price assignment. The valid values are: • **Draft** - Indicates that the price assignment is created as a draft. • **Active** - Indicates that the price assignment is used for billing. • **Inactive** - Indicates that the price assignment is no longer used for billing. • **Proposed** - Indicates that the price assignment is to be used for quotations.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The **Proposed** status indicates that the price assignment is defined for a deal and awaiting approval. • **Template** - Indicates that the price assignment is a template price list. • **Recommended** - Indicates that the price assignment is a recommended price assignment. **Note:** The **Recommended** status indicates that the price assignment is recommended for a deal. **Note:** If a price assignment is in **Active** status, you can change its status to **Inactive**. If a price assignment is in **Draft** status, you cannot change its status to **Proposed**.	
Pricing Currency	Used to indicate the currency in which you want to define the price item pricing.	Yes
Rate Schedule	Used to specify the rate schedule that you want to use while defining price item pricing. **Note:** Rate schedules control how the bills for the price item will be calculated. The **Search** (🔍) icon appears corresponding to this field. On clicking the **Search** icon, the **Rate Schedule Search** screen appears.	Yes
Pricing Rule Type	Used to indicate the pricing rule type. The valid value is: • Two-Dimensional	Yes (Conditional) **Note:** This field is required when you are editing a two-dimensional pricing rule.
Print Zero	Used to indicate whether zero pricing should be displayed in the bill. The valid values are: • Yes • No **Note:** By default, **Yes** is selected.	Yes
Price Assignment Usage	Used to indicate whether the price item pricing is applicable to all customers or only to new customers. The valid values are: • All Customers • New Customers	Yes

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Field Name	Field Description	Mandatory (Yes or No)
Pricing Frequency	Used to indicate pricing frequency for the price item. **Note:** This field appears when **Price Item** is defined as **Only Pricing** and **Price Item Type** is defined as **Fees**.	Yes

2. Define the details in the **Main** section.
3. Define the deal information in a price item pricing.
4. Define the TFM information in a price item pricing.
5. Define the characteristics for a price item pricing.
6. Define the parameters for a price item pricing.
7. Select the required division from the **Commitments** section to define the commitments of a price item pricing.
8. Define the cost of the price item or price item bundle for the required divisions
9. Define the average price floor and ceil limits of the price item or price item bundle for the required divisions.
10. Define the negotiability floor and ceil values of the price item or price item bundle for the required divisions
11. Click **Save**.
    The pricing is defined for a price item.

Related Topics

For more information on...	See...
Price List Price Item Pricing screen	Price List Price Item Pricing on page 861
Search Price Item or Price Item Pricing zone	Search Price Item or Price Item Pricing on page 863
How to search for an person	Searching for a Price List on page 842
How to define a characteristic for a price item pricing.	Defining a Characteristic for a Price Item Pricing on page 881
How to define parameters for a price item pricing.	Defining a Parameter for a Price Item Pricing
How to define TFM Information in a price item pricing.	Defining TFM Information in a Price Item Pricing on page 884
How to define a division-specific cost of a price item in the price item pricing	Defining the Division-Specific Cost of a Price item in the Price Item Pricing
How to define a division-specific average price limit of a price item in the price item pricing	Defining the Division-Specific Average Price Limits of a Price item in the Price Item Pricing
How to define a division-specific rate negotiability limit of a price item in the price item pricing	Defining the Division-Specific Rate Negotiability Limits of a Price item in the Price Item Pricing

Defining a Characteristic for a Price Item Pricing

Note: This topic is not applicable for the health insurance business.

Prerequisites

To define a characteristic for a price item pricing, you should have:

- Characteristic types defined in the application (where the characteristic entity is set to **Price Assignment**)

Procedure

To define a characteristic for a price item pricing:

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1. Ensure that the **Characteristics** section is expanded when you are defining, editing, or overriding a price item pricing. The **Characteristics** section contains the following fields in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Effective Date	Used to specify the date from when the characteristic is effective for the price item pricing. **Note:** You can either manually specify the date or select it using the **Date Picker** ( ) icon corresponding to the field.	Yes (Conditional) **Note:** This field is required while defining a characteristic for the price item pricing.
Characteristic Type	Used to indicate the characteristic type. **Note:** The list includes only those characteristic types where the characteristic entity is set to **Price Item**.	Yes (Conditional) **Note:** This field is required while defining a characteristic for the price item pricing.
Characteristic Value	Used to specify the value for the characteristic type. **Note:** If you select a predefined characteristic type, the **Search** () icon appears corresponding to the **Characteristic Value** field. On clicking the **Search** icon, the **Predefined Characteristic Search** window appears. On specifying the value for a predefined characteristic type, the description of the characteristic value appears corresponding to the **Characteristic Value** field.	Yes (Conditional) **Note:** This field is required while defining a characteristic for the price item pricing.

2. Enter the required details in the **Characteristics** section.
3. If you want to define more than one characteristic for the price item pricing, click the **Add** (+) icon and then *r*epeat step 2.

> **Note:** However, if you want to remove a characteristic from the price item pricing, click the **Delete** ( ) icon corresponding to the characteristic.

4. Click **Save**.
   The characteristic is defined for the price item pricing.

Related Topics

For more information on...	See...
How to define a price item pricing	Defining a Price Item Pricing
How to edit a price item pricing	Editing a Price Item Pricing
How to override a price item pricing	Overriding a Price Item Pricing

Defining a Parameter for a Price Item Pricing

Prerequisites

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To define parameters for a price item pricing, you should have:

- Parameters associated with the price item, in case, you want to define price item pricing based on multiple parameters

Procedure

To define parameter details segment for a price item pricing that is assigned to an account:

1. Ensure that the **Price Item and Parameter Information** section is expanded when you are defining a price *i*tem pricing.
   The **Price Item and Parameter Information** section contains the following field:

Field Name	Field Description
Price Item	Indicates the price item or price item bundle whose pricing details are listed in this section.

   In addition, this section contains a grid which has the following columns:

Column Name	Column Description	Mandatory (Yes or No)
Parameter	Used to indicate the parameter that you want to associate with the price item pricing. **Note:** The **Search** (🔍) icon appears corresponding to this field. On clicking the **Search** icon, the **Price Item Parameter Search** window appears. The parameter search results displays only those parameters where the **Price Item** check box is selected.	Yes
Parameter Information	Displays a comma-separated string which contains of the following: • Parameter Description • Mandatory (Yes or No) • Priority	Not applicable
Parameter Value	Used to specify the value of the parameter.	Yes

2. Enter the required details in the **Price Item and Parameter Information** section.
3. If you want to define more than one parameter information for the price item pricing, click the **Add** (+) icon *a*nd then repeat step 2.

   Note: However, if you want to remove a parameter information from the price item pricing, click the **Delete** (🗑) icon corresponding to the parameter.

4. Click **Save**.
   The parameters are defined for the price item pricing.

Related Topics

For more information on...	See...
How to define a price item pricing	Defining a Price Item Pricing
How to edit a price item pricing	Editing a Price Item Pricing
How to override a price item pricing	Overriding a Price Item Pricing

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Defining TFM Information in a Price Item Pricing

Note: This topic is not applicable for the health insurance business.

Prerequisites

To define the TFM information in a price item pricing, you should have:

- Transactions mapped to the price item defined in the application
- Aggregation or rating criteria to be defined for the price item pricing

Procedure

To define the TFM information in a price item pricing:

1. Ensure that the **TFM Information** section is expanded when you are defining, editing, or overriding a price item pricing.
   The **TFM Information** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Ignore Transaction	Used to indicate whether the transactions mapped to the price item are considered for billing or not. The valid values are: • Yes • No **Note:** By default, the **No** option is selected.	Yes (Conditional) **Note:** This field is required while defining the TFM information in a price item pricing.
Do Not Aggregate Switch	Used to indicate whether aggregation is required while rating the transactions mapped to the price item pricing before billing. The valid values are: • **Yes** - Indicates that aggregation is not required while rating the transactions mapped to the price item pricing before billing. • **No** - Indicates that aggregation is required while rating the transactions mapped to the price item pricing before billing. **Note:** By default, the **Yes** option is selected.	Yes (Conditional) **Note:** This field is required while defining the TFM information in a price item pricing.
Aggregation Schedule	Used to indicate the transaction aggregation cycle. The valid values are: • Weekly • Monthly • Quarterly • Yearly **Note:** The list includes only those aggregation schedules where the schedule type is set to **Only Pricing**.	Yes (Conditional) **Note:** This field is required while defining the TFM information in a price item pricing.
Transaction Rating Criteria	Used to indicate how and when the transaction legs mapped to the price item are rated. The valid values are:	Yes (Conditional)

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Field Name	Field Description	Mandatory (Yes or No)
	• Aggregate Transactions and Then Rate Aggregated SQs **Note:** This field appears when the **Do Not Aggregate Switch** is set to **Yes**. • Do Not Rate Transactions • Rate Transaction and Aggregate Calc Lines **Note:** This field appears when the **Do Not Aggregate Switch** is set to **Yes**. • Rate Transactions **Note:** This option appears when the **Do Not Aggregate Switch** is set to **No**. **Note:** By default, the **Do Not Rate Transactions** option is selected.	**Note:** This field is required while defining the TFM information in a price item pricing.

2. Enter the required details in the **TFM Information** section.

Note: **TFM Information** section appears when the **Show Default Values** in Price Item Pricing option type of **C1_FM feature configuration** is set to **Y** and **Price Item Usage** for the respective price item is set to **Pricing and Billing**.

3. Click **Save**.
   The TFM information is defined in the price item pricing.

Related Topics

For more information on...	See...
How to define a price item pricing	Defining a Price Item Pricing
How to edit a price item pricing	Editing a Price Item Pricing
How to override a price item pricing	Overriding a Price Item Pricing

Price List Assignment

Once a price list is defined, you can assign it to accounts or persons to indicate the prices that will be charged for the price items or services offered to the accounts or persons. You can assign multiple price lists to an account or a person along with the priority or order in which the pricing should be considered. You can also define whether the account or person can avail the price item pricing listed on the parent or grandparent price list if it is not available on the assigned price list. In other words, you can define whether the account or person can inherit the price item pricing from the price list hierarchy.

For example, suppose you have PL1 (with priority 10) and PL2 (with priority 20) assigned to an account or a person. While determining pricing for a price item, the system will search for the price item pricing in PL1. If the system does not find the price item pricing in PL1, it will search for the price item pricing in PL2. The system will behave in this manner when the price list inheritance for PL1 is set to **No** during the price list assignment.

If the price list inheritance while assigning PL1 and PL2 to an account or a person is set to **Yes**, the system will search for the price item pricing in PL1. If the system does not find the price item pricing in PL1, it will search for the price item pricing from the price list hierarchy defined for PL1. However, if the system does not find the price item pricing from the price list hierarchy of PL1, it will then search for the price item pricing in PL2 (assigned to the account or

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person with priority 20). If the system still does not find the price item pricing in PL2, it will search for the price item pricing from the price list hierarchy defined for PL2.

The **Price List Assignment** screen allows you to search and assign a price list to an account or a person. It also allows you to view the price lists that are already assigned to an account or a person. It contains the following zones:

- Price List Assignments on page 886
- Price List Price Items on page 888
- Search Price List for Assignment on page 889

Price List Assignments

The **Price List Assignments** zone allows you to view and filter price lists that are currently assigned to the account or person. You can also search for the price lists assigned to the account or person which are either inactive or expired. You will not find any records in this zone if the account does not have any price lists assigned to it. It contains the following two sections:

- **Search Criteria** - The **Search Criteria** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Search By	Used to indicate whether you want to search for the current, inactive, or historical price list assignments. The valid values are: • Current Price List Assignments • Inactive Price List Assignments • Historical Price List Assignments **Note:** By default, the **Current Price List Assignments** option is selected.	Yes
Price List ID	Used to search a particular price list assigned to an account or a person. **Note:** The **Search** (🔍) icon appears corresponding to the **Price List ID** field. On clicking the **Search** icon, the **Price List Search** window appears.	No
Price List Description	Used to search price lists which are assigned to the account or person having a particular description.	No
Effective Start Date	Used to search price lists which are assigned to the account or person from a particular date. **Note:** You can either manually specify the date or select it using the **Date Picker** (📅) icon corresponding to the field.	No
Effective End Date	Used to search price lists which are assigned to the account or person till a particular date. **Note:** You can either manually specify the date or select it using the **Date Picker** (📅) icon corresponding to the field.	No
Assignment Status	Used to search price list assignments with a particular status. The valid values are:	No

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Field Name	Field Description	Mandatory (Yes or No)
	• Active • Proposed • Rejected • Recommended • Inactive **Note:** The **Inactive** option is not available in the **Assignment Status** list when you have selected the **Current Price List Assignments** or **Historical Price List Assignments** option from the **Search By** list. This field is disabled, and by default, the **Inactive** option is selected when you select the **Inactive Price List Assignments** option from the **Search By** list.	
Price List Inheritance	Used to search price list assignments where the account or person inherits price item pricing from the price list hierarchy. The valid values are: • Yes • No	No

Note: You must specify at least one search criterion while searching for price list assignments.

- **Search Results** - On clicking the **Search** button, the search results appear based on the specified search criteria. The **Search Results** section contains the following columns:

Column Name	Column Description
Price List Information	Displays information about the price list which is assigned to the account or person. **Note:** It has a link. On clicking the link, the **Price List** screen appears with the details of the respective price list.
Effective Start Date	Displays the date from when the price list is assigned to the account or person.
Effective End Date	Displays the date till when the price list is assigned to the account or person.
Priority	Indicates the order in which the assigned price list must be considered while determining the price item pricing for the account or person.
Assignment Status	Indicates the status of the price list assignment. The valid values are: • Active • Proposed • Rejected • Recommended • Inactive
Price List Inheritance	Indicates whether the account or person can avail the price item pricing listed on the parent or grandparent price list if it is not available on the assigned price list. In other words, it indicates whether the account or person can inherit the price item pricing from the price list hierarchy.

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Column Name	Column Description
Edit	On clicking the **Edit** (✎) icon, the **Price List Assignment** screen appears where you can edit the price list assignment details.

Note: Pagination is used to display limited number of records in the **Search Results** section. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

On clicking the **Broadcast** (📡) icon corresponding to the assigned price list, the **Price List Price Items** zone appears where you can view the price items assigned to the price list.

Related Topics

For more information on...	See...
Price List Price Items zone	Price List Price Items on page 861
How to view price items assigned to the price list	Viewing Price Items Assigned to a Price List on page 895
How to edit the price list assignment details of an account	Editing the Price List Assignment Details of an Account on page 902
How to edit the price list assignment details of a person	Editing the Price List Assignment Details of a Person on page 904
How to view price lists assigned to an account	Viewing Price Lists Assigned to an Account on page 893
How to view price lists assigned to a person	Viewing Price Lists Assigned to a Person on page 894

Price List Price Items

The **Price List Price Items** zone lists the price items that are assigned to the price list. You will not find any records in this zone if the price list does not have any price items assigned to it. It contains the following columns:

Column Name	Column Description
Pricing Information	Displays information about the price item pricing. **Note:** It has a link. On clicking the link, the **Price Item Pricing** screen appears where you can view the details of the price item pricing.
Price Item	Displays the price item or price item bundle associated with the price list.
Pricing Parameters	Displays a comma-separated list of parameter values. The order in which parameter values appear in this column is controlled by the display order (which is defined while associating a parameter with a price item). **Note:** This column appears when the **Multi Price Parameter** option type of the **Multi Parameter Based Pricing (C1_PPARM_FLG)** feature configuration is set to **True**.
Pricing Status	Indicates the status of the price item pricing. The valid values are: • Active • Inactive • Proposed • Rejected • Template
Rate Info	Displays the rate of the price item.

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Column Name	Column Description
	Note: If the price assignment has only one price component, you can view the rate defined in the pricing directly through the **Rate Info** column. However, if the price assignment has more than one price components, then the **Rate Info** column contains a string indicating the tiering type and pricing currency. It also contains "..." which indicates that for more information about the pricing you should navigate to the **Price Item Pricing** screen.
Effective Start Date	Displays the date from when the price item pricing is effective for the price list.
Effective End Date	Displays the date till when the price item pricing is effective for the price list.
Price Assignment Type	Indicates the type of the price assignment for price item pricing. The valid values are: • Regular • Post Processing • Post Processing - Invoice Based • Post Processing - Price Item Based **Note:** This column appears when the **Multi Price Parameter** option type of the **Multi Parameter Based Pricing (C1_PPARM_FLG)** feature configuration is set to **True**.
Copy	On clicking the **Copy** (⧉) icon, the **Price Item Pricing** screen appears where you can define a new price item pricing using an existing price item pricing.

By default, the **Price List Price Items** zone does not appear in the **Price List Assignment** screen. It appears when you click the **Broadcast** (📡) icon corresponding to the assigned price list in the **Price List Assignments** zone.

You can filter the list using various search criteria (such as, **Price Item** and **Effective Start Date**) available in the **Filter** area. By default, the **Filter** area is hidden. You can view the **Filter** area by clicking the **Filters** (▽) icon in the upper right corner of this zone.

On clicking the **Broadcast** (📡) icon corresponding to the pricing information, the **Price Item Pricing** and **Price Assignment Tree** zone appears where you can view the price item pricing.

You can change the layout of this zone. For more information on how to change the layout, see Changing the Layout on page 4410.

Related Topics

For more information on...	See...
How to view price items assigned to a price list	Viewing Price Items Assigned to a Price List on page 895

Search Price List for Assignment

The **Search Price List for Assignment** zone allows you to search for a price list that you want to assign to the account or person. It contains the following two sections:

- **Search Criteria** - The **Search Criteria** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Search By	Used to indicate whether you want to search against all price lists or against those price lists which are already assigned to an account or a person. The valid values are:	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	• Price List • Assigned Price List **Note:** By default, the **Price List** option is selected.	
Price List ID	Used to search a particular price list. **Note:** The **Search** (🔍) icon appears corresponding to the **Price List ID** field. On clicking the **Search** icon, the **Price List Search** window appears.	No
Price List Description	Used to search price lists with a particular description.	No
Effective Start Date	If you have selected the **Price List** option from the **Search By** list, this field is used to search price lists which are effective from a particular date onwards. However, if you have selected the **Assigned Price List** option from the **Search By** list, this field is used to search price lists which are assigned to an account or a person from a particular date onwards. **Note:** You can either manually specify the date or select it using the **Date Picker** (📅) icon corresponding to the field.	No
Effective End Date	If you have selected the **Price List** option from the **Search By** list, this field is used to search price lists which are effective till a particular date. However, if you have selected the **Assigned Price List** option from the **Search By** list, this field is used to search price lists which are assigned to an account or a person till a particular date. **Note:** You can either manually specify the date or select it using the **Date Picker** (📅) icon corresponding to the field.	No
Account ID	Used to search price lists assigned to a particular account. **Note:** The **Search** (🔍) icon appears corresponding to the **Account ID** field. On clicking the **Search** icon, the **Account Search** window appears. This field appears when the **Assigned Price List** option is selected from the **Search By** list.	No
Person ID	Used to search price lists assigned to a particular person.	No

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The **Search** (🔍) icon appears corresponding to the **Person ID** field. On clicking the **Search** icon, the **Person Search** window appears. This field appears when the **Assigned Price List** option is selected from the **Search By** list.	
Status	Used to search price lists with a particular status. The valid values are: • Active • Inactive • Proposed **Note:** This field appears when the **Price List** option is selected from the **Search By** list.	No
Price List Type	Used to search a particular type of price lists. The valid values are: • Standard • Promotional **Note:** This field appears when the **Price List** option is selected from the **Search By** list.	No
Only Eligible Price Lists	Used to search price lists which are eligible for the account or person. **Note:** This field appears when the **Price List** option is selected from the **Search By** list.	No
Eligibility Date	Used to search price lists which are eligible for the account or person from a particular date. **Note:** **Note:** This field appears when the **Price List** option is selected from the **Search By** list. By default, the current date appears in this field when the **Only Eligible Price Lists** option is selected. You can change the value, if required. You can either manually specify the date or select it using the **Date Picker** (📅) icon corresponding to the field.	No

Note: You must specify at least one search criterion while searching for a price list.

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- **Search Results** - On clicking the **Search** button, the search results appear based on the specified search criteria. The search results include only those price lists that are associated with the division to which the account belongs. It may also include price lists that are already assigned to the account in case those price lists match the search criteria.

  The **Search Results** section contains the following columns:

Column Name	Column Description
Assign	On clicking the **Assign** () icon, the **Price List Assignment** screen appears where you can assign the price list to the account or person.
Price List Information	Displays the information about the price list.
	Note: It has a link. On clicking the link, the **Price List** screen appears where you can view the details of the respective price list.
Account Information	Displays the information about the account.
	Note: It has a link. On clicking the link, the **Account** screen appears where you can view the details of the respective account. This field appears when the following conditions are met: • When you are viewing the price list assignments of an account. • When the Assigned Price List option is selected from the Search By list.
Person Information	Displays the information about the person.
	Note: It has a link. On clicking the link, the **Person** screen appears where you can view the details of the respective person. This field appears when the following conditions are met: • When you are viewing the price list assignments of a person. • When the Assigned Price List option is selected from the Search By list.
Effective Start Date	If you have selected the **Price List** option from the **Search By** list, the date from when the price list is effective appears in this column. However, if you have selected the **Assigned Price List** option from the **Search By** list, the date from when the price list is assigned to the account or person appears in this column.
Effective End Date	If you have selected the **Price List** option from the **Search By** list, the date till when the price list is effective appears in this column. However, if you have selected the **Assigned Price List** option from the **Search By** list, the date till when the price list is assigned to the account or person appears in this column.
Availability Start Date	Displays the date from when the price list is available for assignment to an account or a person.
Availability End Date	Displays the date till when the price list is available for assignment to an account or a person.

Note: Pagination is used to display limited number of records in the **Search Results** section. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

Related Topics

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For more information on...	See...
How to assign a price list to an account	Assigning a Price List to an Account on page 895
How to assign a price list to a person	Assigning a Price List to a Person on page 898

Viewing Price Lists Assigned to an Account

Procedure

To view the price lists assigned to an account:

1. Search for the account in the **Customer 360° View** screen.
2. In the **Search Results** section, click the **Show Context Menu** (⊙) icon corresponding to the account whose *d*etails you want to view.
   A menu appears.
3. Click the **Go To Price List Assignment** menu option.

   The **Price List Assignment** screen appears. It contains the following zones:

   - **Price List Assignments** - Lists the price lists that are already assigned to the account.
   - **Price List Price Items** - Lists the price items that are assigned to the price list.
   - **Search Price List for Assignment** - Enables you to search for a price list that you want to assign to the account.
   - **Price Item Pricing** - Displays the details of the price item pricing.
   - **Price Assignment Tree** - Displays the details about the rate components and its price components for the price item along with the tiering criteria and pricing eligibility details.
4. Do either of the following:

If...	Then
If you want to view the price lists which are currently assigned to an account	**a.** Ensure that the **Current Price List Assignments** option is selected from the **Search By** list. **b.** Enter the required search criteria and then click **Search**. The price lists which are currently assigned to the account appears in the search results.
If you want to view the price lists assigned to an account which are inactive	**a.** Select the **Inactive Price List Assignments** option from the **Search By** list. **b.** Enter the required search criteria and then click **Search**. The price lists assigned to an account which are inactive appears in the search results.
If you want to view the price lists assigned to an account which are expired	**a.** Select the **Historical Price List Assignments** option from the **Search By** list. **b.** Enter the required search criteria and then click **Search**. The price lists assigned to an account which are expired appears in the search results.

Related Topics

For more information on...	See...
How to search for a person	Searching for an Account

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For more information on...	See...
Price List Assignment screen	Price List Assignment on page 885
Price List Assignments zone	Price List Assignments on page 886

Viewing Price Lists Assigned to a Person

Procedure

To view the price lists assigned to a person:

1. Search for the person in the **Customer 360° View** screen.
2. In the **Search Results** section, click the **Show Context Menu** (⊙) icon corresponding to the person whose *d*etails you want to view.
   A menu appears.
3. Click the **Go To Price List Assignment** menu option.

   The **Price List Assignment** screen appears. It contains the following zones:

   - **Price List Assignments** - Lists the price lists that are already assigned to the person.
   - **Price List Price Items** - Lists the price items that are assigned to the price list.
   - **Search Price List for Assignment** - Enables you to search for a price list that you want to assign to the person.
   - **Price Item Pricing** - Displays the details of the price item pricing.
   - **Price Assignment Tree** - Displays the details about the rate components and its price components for the price item along with the tiering criteria and pricing eligibility details.
4. Do either of the following:

If...	Then
If you want to view the price lists which are currently assigned to a person	**a.** Ensure that the **Current Price List Assignments** option is selected from the **Search By** list. **b.** Enter the required search criteria and then click **Search**. The price lists which are currently assigned to the person appears in the search results.
If you want to view the price lists assigned to a person which are inactive	**a.** Select the **Inactive Price List Assignments** option from the **Search By** list. **b.** Enter the required search criteria and then click **Search**. The price lists assigned to a person which are inactive appears in the search results.
If you want to view the price lists assigned to a person which are expired	**a.** Select the **Historical Price List Assignments** option from the **Search By** list. **b.** Enter the required search criteria and then click **Search**. The price lists assigned to a person which are expired appears in the search results.

Related Topics

For more information on...	See...
How to search for a person	Searching for a Person

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For more information on...	See...
Price List Assignment screen	Price List Assignment on page 885
Price List Assignments zone	Price List Assignments on page 886

Viewing Price Items Assigned to a Price List

Procedure

To view the price items assigned to a price list:

1. Do either of the following:

If you want to view...	Then...
Price items assigned to the price list which is assigned to the account	**a.** Search for the account in the **Customer 360° View** screen. **b.** In the **Search Results** section, click the **Show Context Menu** (⊙) icon corresponding to the account whose *d*etails you want to view. A menu appears. **c.** Click the **Go To Price List Assignment** menu option. The **Price List Assignment** screen appears. **d.** In the **Price List Assignments** zone, click the **Broadcast** (⦾) icon corresponding to the assigned price list whose price items you want to view.
Price items assigned to the price list which is assigned to the person	**a.** Search for the person in the **Customer 360° View** screen. **b.** In the **Search Results** section, click the **Show Context Menu** (⊙) icon corresponding to the person whose *d*etails you want to view. A menu appears. **c.** Click the **Go To Price List Assignment** menu option. The **Price List Assignment** screen appears. **d.** In the **Price List Assignments** zone, click the **Broadcast** (⦾) icon corresponding to the assigned price list whose price items you want to view.

   The **Price List Price Items** zone appears.
2. View the price items that are assigned to the price list in the **Price List Price Items** zone.

Related Topics

For more information on...	See...
How to search for an account	Searching for an Account
How to search for a person	Searching for a Person
Price List Assignment screen	Price List Assignment on page 885
Price List Assignments zone	Price List Assignments on page 886
Price List Price Items zone	Price List Price Items on page 888

Assigning a Price List to an Account

Prerequisites

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To assign a price list to an account, you should have:

- Price list defined in the application
- Price list associated with the division to which the account belongs
- Value defined for the **Default Price List Priority** option type in the **C1_PRICING** feature configuration

Procedure

To assign a price list to an account:

1. Search for the account in the **Customer 360° View** screen.
2. In the **Search Results** section, click the **Show Context Menu** (⊙) icon corresponding to the account whose *d*etails you want to edit.
   A menu appears.
3. Click the **Go To Price List Assignment** menu option.

   The **Price List Assignment** screen appears. It contains the following zones:

   - **Price List Assignments** - Lists the price lists that are already assigned to the account.
   - **Price List Price Items** - Lists the price items that are assigned to the price list.
   - **Search Price List for Assignment** - Enables you to search for a price list that you want to assign to the account.
   - **Price Item Pricing** - Displays the details of the price item pricing.
   - **Price Assignment Tree** - Displays the details about the rate components and its price components for the price item along with the tiering criteria and pricing eligibility details.
4. In the **Search Price List for Assignment** zone, select the **Price List** or **Assigned Price List** option from the **Search By** list depending on whether you want to search against all price lists or against those price lists which *a*re already assigned to an account or a person.
5. Enter the search criteria in the **Search Price List for Assignment** zone.

   Note: ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.
6. Click **Search**.

   A list of price lists that meet the search criteria appears in the **Search Results** section.

   Note: The search results include only those price lists that are associated with the division to which the account belongs. It may also include price lists that are already assigned to the account in case those price lists match the search criteria.
7. In the **Search Results** section, click the **Assign** (✓) icon corresponding to the price list that you want to *a*ssign to the account.

   The **Price List Assignment** screen appears. It consists of the following sections:

   - **Main** - Used to specify basic information while assigning the price list to the account.
   - **Characteristics** - Used to define the characteristics for the price list assignment.

   The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Account Information	Indicates the account to which you want to assign the price list.	Not applicable
Price List Information	Displays the information about the price list.	Not applicable

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<table>
<tr><th>Field Name</th><th>Field Description</th><th>Mandatory (Yes or No)</th></tr>
<tr><td>Effective Start Date</td><td>Used to specify the date from when you want to assign the price list to the account.

Note: The price list assignment start date cannot be earlier than the price list effective start date or later than the price list effective end date.</td><td>Yes</td></tr>
<tr><td>Effective End Date</td><td>Used to specify the date till when you want to assign the price list to the account.

Note:
The effective end date cannot be earlier than the effective start date.
If the validity period is specified for the price list, the price list assignment end date should be earlier than or equal to the following whichever is earlier:
• Price list assignment validity end date (which is price list assignment start date + validity period)
• Price list effective end date
Let us understand this with the help of the following example:
<table><tr><td>Price List Effective Start Date</td><td>01-Jan-2015</td></tr><tr><td>Price List Effective End Date</td><td>31-Jan-2015</td></tr><tr><td>Validity Period</td><td>15 Days</td></tr><tr><td>Price List Assignment Start Date</td><td>15-Jan-2015</td></tr><tr><td>Price List Assignment Validity End Date</td><td>30-Jan-2015 (i.e. 15-Jan-2015 + 15 Days)</td></tr></table>In the above example, the price list assignment end date must be earlier than or equal to the price list assignment validity end date because the price list assignment validity end date is earlier than the price list effective end date.</td><td>No</td></tr>
<tr><td>Priority</td><td>Used to specify the order in which the price list should be considered while determining the price item pricing for the account.</td><td>Yes</td></tr>
<tr><td>Price List Inheritance</td><td>Used to indicate whether the account can avail the price item pricing listed on the parent or grandparent price list if it is not available on the price list. The valid values are:
• Yes - Used to indicate that the account can inherit the price item pricing from the price list hierarchy.
• No - Used to indicate that the account cannot inherit the price item pricing from the price list hierarchy.</td><td>Yes</td></tr>
<tr><td>Assignment Status</td><td>Used to indicate the status of the price list assignment. The valid values are:</td><td>Yes</td></tr>
</table>

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Field Name	Field Description	Mandatory (Yes or No)
	• **Active** - Used to indicate that you want to use the price item pricing on the price list for billing. • **Proposed** - Used to indicate that you want to use the price item pricing on the price list for quotations.	

8. Enter the required details in the **Main** section.
9. Define characteristics for the price list assignment, if required.
10. Click **Save**.
    The price list is assigned to the account.

Related Topics

For more information on...	See
How to search for an account	Searching for an Account
Price List Assignment screen	Price List Assignment on page 885
Search Price List for Assignment zone	Search Price List for Assignment on page 889
How to define a characteristic for a price list assignment	Defining a Characteristic for a Price List Assignment on page 901
How to set the **C1_PRICING** feature configuration	Setting the C1_PRICING Feature Configuration on page 4464

Assigning a Price List to a Person

Prerequisites

To assign a price list to a person, you should have:

- Price list defined in the application
- Price list associated with the division to which the person belongs
- Value defined for the **Default Price List Priority** option type in the **C1_PRICING** feature configuration

Procedure

To assign a price list to a person:

1. Search for the person in the **Customer 360° View** screen.
2. In the **Search Results** section, click the **Show Context Menu** (⊙) icon corresponding to the person whose *d*etails you want to edit.
   A menu appears.
3. Click the **Go To Price List Assignment** menu option.

   The **Price List Assignment** screen appears. It contains the following zones:

   - **Price List Assignments** - Lists the price lists that are already assigned to the person.
   - **Price List Price Items** - Lists the price items that are assigned to the price list.
   - **Search Price List for Assignment** - Enables you to search for a price list that you want to assign to the person.
   - **Price Item Pricing** - Displays the details of the price item pricing.
   - **Price Assignment Tree** - Displays the details about the rate components and its price components for the price item along with the tiering criteria and pricing eligibility details.
4. In the **Search Price List for Assignment** zone, select the **Price List** or **Assigned Price List** option from the **Search By** list depending on whether you want to search against all price lists or against those price lists which *a*re already assigned to an account or a person.
5. Enter the search criteria in the **Search Price List for Assignment** zone.

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Note: ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.

6. Click **Search**.

   A list of price lists that meet the search criteria appears in the **Search Results** section.

Note: The search results include only those price lists that are associated with the division to which the person belongs. It may also include price lists that are already assigned to the person in case those price lists match the search criteria.

7. In the **Search Results** section, click the **Assign** ( ) icon corresponding to the price list that you want to *a*ssign to the person.

   The **Price List Assignment** screen appears. It consists of the following sections:

   - **Main** - Used to specify basic information while assigning the price list to the person.
   - **Characteristics** - Used to define the characteristics for the price list assignment.

   The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Person Information	Indicates the person to whom you want to assign the price list.	Not applicable
Price List Information	Displays the information about the price list.	Not applicable
Effective Start Date	Used to specify the date from when you want to assign the price list to the person. **Note:** The price list assignment start date cannot be earlier than the price list effective start date or later than the price list effective end date.	Yes
Effective End Date	Used to specify the date till when you want to assign the price list to the person.	No

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<table>
<tr><th>Field Name</th><th>Field Description</th><th>Mandatory (Yes or No)</th></tr>
<tr><td></td><td>Note:
The effective end date cannot be earlier than the effective start date.
If the validity period is specified for the price list, the price list assignment end date should be earlier than or equal to the following whichever is earlier:
• Price list assignment validity end date (which is price list assignment start date + validity period)
• Price list effective end date
Let us understand this with the help of the following example:
<table><tr><td>Price List Effective Start Date</td><td>01-Jan-2015</td></tr><tr><td>Price List Effective End Date</td><td>31-Jan-2015</td></tr><tr><td>Validity Period</td><td>15 Days</td></tr><tr><td>Price List Assignment Start Date</td><td>15-Jan-2015</td></tr><tr><td>Price List Assignment Validity End Date</td><td>30-Jan-2015 (i.e. 15-Jan-2015 + 15 Days)</td></tr></table>In the above example, the price list assignment end date must be earlier than or equal to the price list assignment validity end date because the price list assignment validity end date is earlier than the price list effective end date.</td><td></td></tr>
<tr><td>Priority</td><td>Used to specify the order in which the price list should be considered while determining the price item pricing for the person.</td><td>Yes</td></tr>
<tr><td>Price List Inheritance</td><td>Used to indicate whether the person can avail the price item pricing listed on the parent or grandparent price list if it is not available on the price list. The valid values are:
• Yes - Used to indicate that the person can inherit the price item pricing from the price list hierarchy.
• No - Used to indicate that the person cannot inherit the price item pricing from the price list hierarchy.</td><td>Yes</td></tr>
<tr><td>Assignment Status</td><td>Used to indicate the status of the price list assignment. The valid values are:
• Active - Used to indicate that you want to use the price item pricing on the price list for billing.
• Proposed - Used to indicate that you want to use the price item pricing on the price list for quotations.</td><td>Yes</td></tr>
</table>

8. Enter the required details in the **Main** section.
9. Define characteristics for the price list assignment, if required.
10. Click **Save**.
    The price list is assigned to the person.

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Related Topics

For more information on...	See
How to search for a person	Searching for a Person
Price List Assignment screen	Price List Assignment on page 885
Search Price List for Assignment zone	Search Price List for Assignment on page 889
How to define a characteristic for a price list assignment	Defining a Characteristic for a Price List Assignment on page 901
How to set the **C1_PRICING** feature configuration	Setting the C1_PRICING Feature Configuration on page 4464

Defining a Characteristic for a Price List Assignment

Prerequisites

To define a characteristic for a price list assignment, you should have:

- Characteristic types defined in the application (where the characteristic entity is set to **Price List Assignment**)

Procedure

To define a characteristic for a price list assignment:

1. Ensure that the **Characteristics** section is expanded when you are defining or editing characteristics for a *p*rice list assignment.

   The **Characteristics** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Effective Date	Used to specify the date from when the characteristic is effective for the price list assignment.	Yes (Conditional) **Note:** This field is required when you are defining a characteristic for the price list assignment.
Characteristic Type	Used to indicate the characteristic type. **Note:** The list includes only those characteristic types where the characteristic entity is set to **Price List Assignment**.	Yes (Conditional) **Note:** This field is required when you are defining a characteristic for the price list assignment.
Characteristic Value	Used to specify the value for the characteristic type. **Note:** On specifying the value for a predefined characteristic type, the description of the characteristic value appears corresponding to the **Characteristic Value** field.	Yes (Conditional) **Note:** This field is required when you are defining a characteristic for the price list assignment.

2. Enter the required details in the **Characteristics** section.

   Note: If you select a predefined characteristic type, the **Search** (🔍) icon appears corresponding to the **Characteristic Value** field. On clicking the **Search** icon, you can search for a predefined characteristic value.

3. If you want to define more than one characteristic for the price list assignment, click the **Add** (+) icon and *t*hen repeat step *2*.

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> **Note:** However, if you want to remove a characteristic from the price list assignment, click the **Delete** (🗑) icon corresponding to the characteristic.

4. Click **Save**.
   The characteristics are defined for the price list assignment.

Related Topics

For more information on...	See...
How to assign a price list to an account	Assigning a Price List to an Account on page 895
How to assign a price list to a person	Assigning a Price List to a Person on page 898
How to edit the price list assignment details of an account	Editing the Price List Assignment Details of an Account on page 902
How to edit the price list assignment details of a person	Editing the Price List Assignment Details of a Person on page 904

Editing the Price List Assignment Details of an Account

Procedure

To edit the price list assignment details of an account:

1. Search for the account in the **Customer 360° View** screen.
2. In the **Search Results** section, click the **Show Context Menu** (⊙) icon corresponding to the account whose *d*etails you want to edit.
   A menu appears.
3. Click the **Go To Price List Assignment** menu option.

   The **Price List Assignment** screen appears. It contains the following zones:

   - **Price List Assignments** - Lists the price lists that are already assigned to the account.
   - **Price List Price Items** - Lists the price items that are assigned to the price list.
   - **Search Price List for Assignment** - Enables you to search for a price list that you want to assign to the account.
   - **Price Item Pricing** - Displays the details of the price item pricing.
   - **Price Assignment Tree** - Displays the details about the rate components and its price components for the price item along with the tiering criteria and pricing eligibility details.
4. Do either of the following:

If you want to...	Then...
Edit the details of the price list assignment which is currently effective	**a.** Select the **Current Price List Assignments** option from the **Search By** list. **b.** Enter the required search criteria and then click **Search**. The price lists which are currently assigned to the account appears in the search results. **c.** In the **Search Results** section, click the **Edit** (✎) icon in the **Edit** column corresponding to the price list whose assignment details *y*ou want to edit.
Edit the details of the price list assignment which is expired	**a.** Select the **Historical Price List Assignments** option from the **Search By** list. **b.** Enter the required search criteria and then click **Search**.

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If you want to...	Then...
	The price lists assigned to an account which are expired appears in the search results. **c.** In the **Search Results** section, click the **Edit** (✎) icon in the **Edit** column corresponding to the price list whose assignment details *y*ou want to edit.

The **Price List Assignment** screen appears. It contains the following sections:

- **Main** - Used to specify basic information while assigning the price list to the account.
- **Characteristics** - Used to define the characteristics for the price list assignment.

The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Account Information	Indicates the account whose price list assignment details you want to edit.	Not applicable
Price List Information	Displays the information about the price list.	Not applicable
Effective Start Date	Displays the date from when the price list is assigned to the account.	Not applicable
Effective End Date	Used to specify the date till when you want to assign the price list to the account. **Note:** The effective end date cannot be earlier than the effective start date. If the validity period is specified for the price list, the price list assignment end date should be earlier than or equal to the following whichever is earlier: • Price list assignment validity end date (which is price list assignment start date + validity period) • Price list effective end date Let us understand this with the help of the following example:	No

Price List Effective Start Date	01-Jan-2015
Price List Effective End Date	31-Jan-2015
Validity Period	15 Days
Price List Assignment Start Date	15-Jan-2015
Price List Assignment Validity End Date	30-Jan-2015 (i.e. 15-Jan-2015 + 15 Days)

In the above example, the price list assignment end date must be earlier than or equal to the price list assignment validity end date because the price list assignment validity end date is earlier than the price list effective end date.

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Field Name	Field Description	Mandatory (Yes or No)
Priority	Used to specify the order in which the price list should be considered while determining the price item pricing for the account.	Yes
Price List Inheritance	Used to indicate whether the account can avail the price item pricing listed on the parent or grandparent price list if it is not available on the price list. The valid values are: • **Yes** - Used to indicate that the account can inherit the price item pricing from the price list hierarchy. • **No** - Used to indicate that the account cannot inherit the price item pricing from the price list hierarchy.	Yes
Assignment Status	Used to indicate the status of the price list assignment. The valid values are: • **Active** - Used to indicate that you want to use the price item pricing on the price list for billing. This value appears when you are editing an active and proposed price list assignment. • **Inactive** - Used to indicate that you no longer want to use the price list assignment. This value appears when you are editing an active price list assignment. **Note:** You cannot change the status of a rejected price list assignment.	Yes

5. Modify the required details in the **Main** section.
6. Define, edit, or remove characteristics of the price list assignment, if required.
7. Click **Save**.
   The changes made to the price list assignment are saved.

Related Topics

For more information on...	See
How to search for an account	Searching for an Account
Price List Assignment screen	Price List Assignment on page 885
Price List Assignments zone	Price List Assignments on page 886
How to define a characteristic for a price list assignment	Defining a Characteristic for a Price List Assignment on page 901

Editing the Price List Assignment Details of a Person

Procedure

To edit the price list assignment details of a person:

1. Search for the person in the **Customer 360° View** screen.
2. In the **Search Results** section, click the **Show Context Menu** (⊙) icon corresponding to the person whose *d*etails you want to edit.
   A menu appears.
3. Click the **Go To Price List Assignment** menu option.

   The **Price List Assignment** screen appears. It contains the following zones:

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- **Price List Assignments** - Lists the price lists that are already assigned to the person.
- **Price List Price Items** - Lists the price items that are assigned to the price list.
- **Search Price List for Assignment** - Enables you to search for a price list that you want to assign to the person.
- **Price Item Pricing** - Displays the details of the price item pricing.
- **Price Assignment Tree** - Displays the details about the rate components and its price components for the price item along with the tiering criteria and pricing eligibility details.

4. Do either of the following:

If you want to...	Then...
Edit the details of the price list assignment which is currently effective	**a.** Select the **Current Price List Assignments** option from the **Search By** list. **b.** Enter the required search criteria and then click **Search**. The price lists which are currently assigned to the person appears in the search results. **c.** In the **Search Results** section, click the **Edit** (✎) icon in the **Edit** column corresponding to the price list whose assignment details you want to edit.
Edit the details of the price list assignment which is expired	**a.** Select the **Historical Price List Assignments** option from the **Search By** list. **b.** Enter the required search criteria and then click **Search**. The price lists assigned to a person which are expired appears in the search results. **c.** In the **Search Results** section, click the **Edit** (✎) icon in the **Edit** column corresponding to the price list whose assignment details you want to edit.

The **Price List Assignment** screen appears. It contains the following sections:

- **Main** - Used to specify basic information while assigning the price list to the person.
- **Characteristics** - Used to define the characteristics for the price list assignment.

The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Person Information	Indicates the person whose price list assignment details you want to edit.	Not applicable
Price List Information	Displays the information about the price list.	Not applicable
Effective Start Date	Displays the date from when the price list is assigned to the person.	Not applicable
Effective End Date	Used to specify the date till when the price list is assigned to the person.	No

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<table>
<tr><th>Field Name</th><th>Field Description</th><th>Mandatory (Yes or No)</th></tr>
<tr><td></td><td>Note:
The effective end date cannot be earlier than the effective start date.
If the validity period is specified for the price list, the price list assignment end date should be earlier than or equal to the following whichever is earlier:
• Price list assignment validity end date (which is price list assignment start date + validity period)
• Price list effective end date
Let us understand this with the help of the following example:
<table><tr><td>Price List Effective Start Date</td><td>01-Jan-2015</td></tr><tr><td>Price List Effective End Date</td><td>31-Jan-2015</td></tr><tr><td>Validity Period</td><td>15 Days</td></tr><tr><td>Price List Assignment Start Date</td><td>15-Jan-2015</td></tr><tr><td>Price List Assignment Validity End Date</td><td>30-Jan-2015 (i.e. 15-Jan-2015 + 15 Days)</td></tr></table>In the above example, the price list assignment end date must be earlier than or equal to the price list assignment validity end date because the price list assignment validity end date is earlier than the price list effective end date.</td><td></td></tr>
<tr><td>Priority</td><td>Used to specify the order in which the price list should be considered while determining the price item pricing for the person.</td><td>Yes</td></tr>
<tr><td>Price List Inheritance</td><td>Used to indicate whether the person can avail the price item pricing listed on the parent or grandparent price list if it is not available on the price list. The valid values are:
• Yes - Used to indicate that the person can inherit the price item pricing from the price list hierarchy.
• No - Used to indicate that the person cannot inherit the price item pricing from the price list hierarchy.</td><td>Yes</td></tr>
<tr><td>Assignment Status</td><td>Used to indicate the status of the price list assignment. The valid values are:
• Active - Used to indicate that you want to use the price item pricing on the price list for billing. This value appears when you are editing an active and proposed price list assignment.
• Inactive - Used to indicate that you no longer want to use the price list assignment. This value appears when you are editing an active price list assignment.</td><td>Yes</td></tr>
</table>

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Field Name	Field Description	Mandatory (Yes or No)
	Note: You cannot change the status of a rejected price list assignment.	

5. Modify the required details in the **Main** section.
6. Define, edit, or remove characteristics of the price list assignment, if required.
7. Click **Save**.
   The changes made to the price list assignment are saved.

Related Topics

For more information on...	See
How to search for a person	Searching for a Person
Price List Assignment screen	Price List Assignment on page 885
Price List Assignments zone	Price List Assignments on page 886
How to define a characteristic for a price list assignment	Defining a Characteristic for a Price List Assignment on page 901

Price List Assignments

The **Price List Assignments** screen allows you to view the persons and accounts where the price list is assigned. It contains the following zones:

- Persons to whom Price List is Assigned on page 908
- Accounts where Price List is Assigned on page 907

Accounts where Price List is Assigned

The **Accounts where Price List is Assigned** zone displays the details of the accounts where the price list is assigned. It contains the following columns:

Column Name	Column Description
Account ID	Displays the account ID.
Account Information	Displays the concatenated string of information about the account separated by a comma (,). In addition, a context menu (⊙) appears corresponding to this field which helps in navigating to other screens in the application.
	Note: It has a link. On clicking the link, the **Account** screen appears where you can view the details of the respective account.
Price List Assignment Start Date	Displays the date from when the price list assigned to the account.
Price List Assignment End Date	Displays the date till when the price list assigned to the account.
Division	Displays the division to which the account belongs.
Price List Assignment ID	Displays the price list assignment ID.

You can filter the list using various search criteria (such as, **Account ID**, **Price List Assignment Start Date**, **Price List Assignment End Date** and **Division**) available in the **Filter** area. By default, the **Filter** area is hidden. You can view the **Filter** area by clicking the **Filters** (▽) icon in the upper right corner of this zone.

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Note: Pagination is used to display limited number of records in this zone. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

Related Topics

For more information on...	See...
How to search a price list	Searching for a Price List on page 842
How to view the accounts and persons where the price list is assigned	Viewing Accounts and Persons where Price List is Assigned on page 908

Persons to whom Price List is Assigned

The **Persons to whom Price List is Assigned** zone displays the details of the persons to whom the price list is assigned. It contains the following columns:

Column Name	Column Description
Person ID	Displays the person ID.
Person Information	Displays the concatenated string of information about the person separated by a comma (,). In addition, a context menu (⊙) appears corresponding to this field which helps in navigating to other screens in the application.
	Note: It has a link. On clicking the link, the **Person** screen appears where you can view the details of the respective person.
Price List Assignment Start Date	Displays the date from when the price list is assigned to the person.
Price List Assignment End Date	Displays the date till when the price list is assigned to the person.
Division	Displays the division to which the person belongs.
Price List Assignment ID	Displays the price list assignment ID.

You can filter the list using various search criteria (such as, **Person ID**, **Price List Assignment Start Date**, **Price List Assignment End Date** and **Division**) available in the **Filter** area. By default, the **Filter** area is hidden. You can view the **Filter** area by clicking the **Filters** (▽) icon in the upper right corner of this zone.

Note: Pagination is used to display limited number of records in this zone. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

Related Topics

For more information on...	See...
How to search a price list	Searching for a Price List on page 842
How to view the accounts and persons where the price list is assigned	Viewing Accounts and Persons where Price List is Assigned on page 908

Viewing Accounts and Persons where Price List is Assigned

Procedure

To view the accounts and persons where the price list is assigned:

1. Search for the price list in the **Price List** screen.

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2. In the **Search Results** section, click the **View** (🔗) icon in the **Price List Assigned To** column corresponding to *t*he price list whose assignment details you want to view.
   The **Price List Assignments** screen appears.
3. View the persons to whom the price list is assigned in the **Persons to whom Price List is Assigned** zone and view the accounts where the price list is assigned in the **Accounts where Price List is Assigned** zone.

Related Topics

For more information on...	**See...**
How to search a price list	Searching for a Price List on page 842
Price List Assignments screen	Price List Assignments on page 907
Accounts where Price List is Assigned zone	Accounts where Price List is Assigned on page 907
Persons to whom Price List is Assigned zone	Persons to whom Price List is Assigned on page 908

Entities Eligible for Price List Assignment

The **Entities Eligible for Price List Assignment** screen allows you to view the accounts and persons that are eligible for the price list assignment. It also allows you to search for a list of eligible accounts and persons and assign them to the price list. It contains the following zones:

- Eligible Accounts on page 909
- Eligible Persons on page 911

Eligible Accounts

The **Eligible Accounts** zone allows you to search for the accounts that are eligible for the price list assignment. It also allows you to assign the price list to one or more eligible accounts. It contains the following two sections:

- **Search Criteria** - The **Search Criteria** section contains the following fields:

Field Name	**Field Description**	**Mandatory (Yes or No)**
Division	Used to indicate the division whose eligible accounts you want to search for the price list assignment. **Note:** You can view only those divisions to which you have access in the **Division** list. Also, the list shows only those divisions to which the price list is associated.	Yes
Effective Date	Used to search accounts by specifying the date from when they are eligible for price list assignment. **Note:** You can either manually specify the date or select it using the **Date Picker** (📅) icon corresponding to the field.	No
Account ID	Used to search a particular account to which you want to assign the price list.	No

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The **Search** (🔍) icon appears corresponding to the **Account ID** field. On clicking the **Search** icon, the **Account Search** window appears where you can search for the respective account. On specifying the account, the account information appears corresponding to the **Account ID** field. The account information has a link. On clicking the link, the **Account** screen appears where you can view the details of the respective account.	

- **Search Results** - On clicking the **Search** button, the search results appear based on the specified search criteria. The **Search Results** section contains the following columns:

Column Name	Column Description
Account Information	Displays the concatenated string of information about the account separated by a comma (,). In addition, a context menu (⊙) appears corresponding to this field which helps in navigating to other screens in the application.
	Note: It has a link. On clicking the link, the **Account** screen appears where you can view the details of the respective account.
Assigned	Indicates whether the price list is assigned to the account or not. The valid values are: • Yes • No

You can select one or more accounts for price list assignment by clicking the check box corresponding to the **Account Information** column.

Note: Pagination is used to display limited number of records in the **Search Results** section. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

In addition, the **Search Results** section contains the following button:

Button Name	Button Description
Assign	On clicking the **Assign** button, you can assign the price list to the selected account/ accounts.

Related Topics

For more information on...	See...
How to search for a price list	Searching for a Price List on page 842
How to view the accounts and persons eligible for price list assignment	Viewing Accounts and Persons Eligible for Price List Assignment
How to define a characteristic for a price list assignment	Defining a Characteristic for a Price List Assignment on page 916

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Eligible Persons

The **Eligible Persons** zone allows you to search for the persons that are eligible for the price list assignment. It also allows you to assign the price list to one or more eligible persons. It contains the following two sections:

- **Search Criteria** - The **Search Criteria** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Division	Used to indicate the division whose eligible persons you want to search for the price list assignment. **Note:** You can view only those divisions to which you have access in the **Division** list. Also, the list shows only those divisions to which the price list is associated.	Yes
Effective Date	Used to search persons by specifying the date from when they are eligible for price list assignment. **Note:** You can either manually specify the date or select it using the **Date Picker** ( ) icon corresponding to the field.	No
Person ID	Used to search a particular person to whom you want to assign the price list. **Note:** The **Search** () icon appears corresponding to the **Person ID** field. On clicking the **Search** icon, the **Person Search** window appears where you can search for the respective person. On specifying the person, the person information appears corresponding to the **Person ID** field. The person information has a link. On clicking the link, the **Person** screen appears where you can view the details of the respective person.	No

- **Search Results** - On clicking the **Search** button, the search results appear based on the specified search criteria. The **Search Results** section contains the following columns:

Column Name	Column Description
Person Information	Displays the concatenated string of information about the person separated by a comma (,). In addition, a context menu ( ) appears corresponding to this field which helps in navigating to other screens in the application. **Note:** It has a link. On clicking the link, the **Person** screen appears where you can view the details of the respective person.

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Column Name	Column Description
Assigned	Indicates whether the price list is assigned to the person or not. The valid values are: • Yes • No

You can select one or more persons for price list assignment by clicking the check box corresponding to the **Person Information** column.

Note: Pagination is used to display limited number of records in the **Search Results** section. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

In addition, the **Search Results** section contains the following button:

Button Name	Button Description
Assign	On clicking the **Assign** button, you can assign the price list to the selected person/ persons.

Related Topics

For more information on...	See...
How to search for a price list	Searching for a Price List on page 842
How to view the accounts and persons eligible for price list assignment	Viewing Accounts and Persons Eligible for Price List Assignment
How to define a characteristic for a Price List Assignment	Defining a Characteristic for a Price List Assignment on page 916

Assigning a Price List to One or More Eligible Accounts

Prerequisites

To assign a price list to one or more eligible accounts, you should have:

- Price list defined in the application
- Accounts created in the application
- Price list associated with the division to which the account/accounts belong.
- Value defined for the **Default Price List Priority** option type in the **C1_PRICING** feature configuration

Procedure

To assign a price list to one or more eligible accounts:

1. Search for the eligible accounts in the **Eligible Accounts** zone of the **Entities Eligible for Price List Assignment** screen.
2. In the **Search Results** section, click the check box corresponding to the account/accounts to which you want to assign the price list.
3. Click the **Assign** button available in the upper left corner of the **Search Results** section.
   The **Price List Assignment** screen appears. It contains the following two sections:
   - **Main** - Used to specify basic details about the price list assignment.
   - **Characteristics** - Used to define a list of characteristics for the price list assignment.

   The **Main** section contains the following fields:

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Field Name	Field Description	Mandatory (Yes or No)
Price List Information	Displays the concatenated string of information about the price list separated by a comma (,).	Not applicable
Effective Start Date	Used to specify the date from when the price list assignment is effective for the account/ accounts. **Note:** You can either manually specify the date or select it using the **Date Picker** ( ) icon corresponding to the field.	Yes
Effective End Date	Used to specify the date till when the price list assignment is effective for the account/ accounts. **Note:** You can either manually specify the date or select it using the **Date Picker** ( ) icon corresponding to the field.	No
Priority	Used to specify the order in which the price list is considered while determining the price item pricing for the account.	No
Price List Inheritance	Used to indicate whether the account can avail the price item pricing listed on the parent or grandparent price list if it is not available on the price list. The valid values are: • Yes • No	No
Assignment Status	Used to indicate the status of the price list assignment. The valid values are: • Active • Proposed	No
Priority Indicator	Used to set the priority of the price list assignment. The valid values are: • **Highest** - Used when you want the price list assignment to have the highest priority. It checks whether there are any other price list assignments for the account, derives the priority of each such price list assignment, and then sets the priority of the new price list assignment to the existing price list assignment with highest priority minus one. • **Lowest** - Used when you want the price list assignment to have the lowest priority. It checks whether there are any other price list assignments for the account, derives the priority of each such price list assignment, and then sets the priority of the new price	No

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Field Name	Field Description	Mandatory (Yes or No)
	list assignment to the existing price list assignment with lowest priority plus one.	

4. Enter the required details in the **Main** section.
5. Define a list of characteristics for the price list assignment in the **Characteristics** section, if required/
6. Click **Save**.
   The price list is assigned to the selected account/accounts.

Related Topics

For more information on...	See...
How to search for a price list	Searching for a Price List on page 842
Eligible Accounts zone	Eligible Accounts on page 909
Entities Eligible for Price List Assignment screen.	Entities Eligible for Price List Assignment on page 909
How to define a characteristic for a Price List Assignment	Defining a Characteristic for a Price List Assignment on page 916
How to set the **C1_PRICING** feature configuration	Setting the C1_PRICING Feature Configuration on page 4464

Assigning a Price List to One or More Eligible Persons

Prerequisites

To assign a price list to one or more eligible persons, you should have:

- Price list defined in the application
- Persons created in the application
- Price list associated with the division to which the person/persons belong.
- Value defined for the **Default Price List Priority** option type in the **C1_PRICING** feature configuration

Procedure

To assign a price list to one or more eligible persons:

1. Search for the eligible persons in the **Eligible Persons** zone of the **Entities Eligible for Price List Assignment** screen.
2. In the **Search Results** section, click the check box corresponding to the person/persons to whom you want to assign the price list.
3. Click the **Assign** button available in the upper left corner of the **Search Results** section.
   The **Price List Assignment** screen appears. It contains the following two sections:
   - **Main** - Used to specify basic details about the price list assignment.
   - **Characteristics** - Used to define a list of characteristics for the price list assignment.

   The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Price List Information	Displays the concatenated string of information about the price list separated by a comma (,).	Not applicable
Effective Start Date	Used to specify the date from when the price list assignment is effective for the person/persons.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	Note: You can either manually specify the date or select it using the **Date Picker** ( ) icon corresponding to the field.	
Effective End Date	Used to specify the date till when the price list assignment is effective for the person/persons. **Note:** You can either manually specify the date or select it using the **Date Picker** ( ) icon corresponding to the field.	No
Priority	Used to specify the order in which the price list is considered while determining the price item pricing for the person.	No
Price List Inheritance	Used to indicate whether the person can avail the price item pricing listed on the parent or grandparent price list if it is not available on the price list. The valid values are: • Yes • No	No
Assignment Status	Used to indicate the status of the price list assignment. The valid values are: • Active • Proposed	No
Priority Indicator	Used to set the priority of the price list assignment. The valid values are: • **Highest** - Used when you want the price list assignment to have the highest priority. It checks whether there are any other price list assignments for the person, derives the priority of each such price list assignment, and then sets the priority of the new price list assignment to the existing price list assignment with highest priority minus one. • **Lowest** - Used when you want the price list assignment to have the lowest priority. It checks whether there are any other price list assignments for the person, derives the priority of each such price list assignment, and then sets the priority of the new price list assignment to the existing price list assignment with lowest priority plus one.	No

4. Enter the required details in the **Main** section.
5. Define a list of characteristics for the price list assignment in the **Characteristics** section, if required/
6. Click **Save**.
   The price list is assigned to the selected person/persons.

Related Topics

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For more information on...	See...
How to search for a price list	Searching for a Price List on page 842
Eligible Persons zone	Eligible Persons on page 911
Entities Eligible for Price List Assignment screen.	Entities Eligible for Price List Assignment on page 909
How to define a characteristic for a Price List Assignment	Defining a Characteristic for a Price List Assignment on page 916
How to set the **C1_PRICING** feature configuration	Setting the C1_PRICING Feature Configuration on page 4464

Defining a Characteristic for a Price List Assignment

Prerequisites

To define a characteristic for a price list assignment, you should have:

- Characteristic types defined in the application (where the characteristic entity is set to **Price List Assignment**)

Procedure

To define a characteristic for a price list assignment:

1. Ensure that the **Characteristics** section is expanded when you are assigning a price list to *m*ultiple persons or accounts or when you are editing the price list assignment details of multiple persons or accounts.

   The **Characteristics** section contains the following fields in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Effective Date	Used to specify the date from when the characteristic is effective for the price list assignment. **Note:** You can either manually specify the date or select it using the **Date Picker** ( ) icon corresponding to the field.	Yes (Conditional) **Note:** This field is required while defining a characteristic for the price list assignment.
Characteristic Type	Used to indicate the characteristic type. **Note:** The list includes only those characteristic types where the characteristic entity is set to **Price List Assignment**.	Yes (Conditional) **Note:** This field is required while defining a characteristic for the price list assignment.
Characteristic Value	Used to specify the value for the characteristic type. **Note:** If you select a predefined characteristic type, the **Search** ( ) icon appears corresponding to the **Characteristic Value** field. On clicking the **Search** icon, the **Predefined Characteristic Search** window appears. On specifying the value for a predefined characteristic type, the description of the characteristic value appears corresponding to the **Characteristic Value** field.	Yes (Conditional) **Note:** This field is required while defining a characteristic for the price list assignment.

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2. Enter the required details in the **Characteristics** section.
3. If you want to define more than one characteristic for the price list assignment, click the **Add** (+) icon and *t*hen repeat step *2*.

> **Note:** However, if you want to remove a characteristic from the price list assignment, click the **Delete** (🗑) icon corresponding to the characteristic.

4. Click **Save**.
   The characteristic is defined for the price list assignment.

Related Topics

For more information on...	See...
How to assign a price list to a person	Assigning a Price List to a Person on page 898
How to edit the price list assignment details of a person	Editing the Price List Assignment Details of a Person on page 904

Rate Definition

Rate schedules, rate versions, and rate components are used to define the formulas to calculate the total amount charged to a customer for a product. Some examples of formulas are: price times the number of transactions used and a flat monthly charge plus a percentage of the average daily balance.

The rate is a formula with variables whose values are supplied by a user by setting up a price list or override price. For example, a rate might add a flat monthly charge and a percentage of the average daily balance to arrive at the amount charged to the customer. This rate might be used to calculate the charge for multiple products, each product with its own flat amount and percentage. So, these two factors are defined as variables whose values must be entered by users when they setup price list or override price. In Oracle Revenue Management and Billing (ORMB), these variables are defined as rate components.

The system provides you with the ability to create tiered pricing in case standard flat pricing is not sufficient to meet the business needs. The **Rate Definition** screen allows you to indicate whether the rate component supports standard flat pricing or tiered pricing. It allows you to define, edit, and delete the tiering setup of a rate component. This screen consists of the following zones:

- Rate Schedule Components on page 917
- Create/Edit Rate Definition on page 918

Rate Schedule Components

The **Rate Schedule Components** zone allows you to select the rate schedule whose rate components' tiering setup you want to define or edit. This zone contains the following two sections:

- **Search Criteria** - The **Search Criteria** section contains the following field:

Field Name	Field Description	Mandatory (Yes or No)
Rate Schedule	Used to select the rate schedule.	Yes

- **Search Results** - On clicking the **Search** button, the rate components of the rate schedule appear in the search results. The **Search Results** section contains the following columns:

Column Name	Column Description
Rate Schedule	Displays the rate schedule.

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Column Name	Column Description
Rate Component Sequence	Displays the sequence number of the rate component.
Rate Component Description	Displays the description of the rate component.
Effective Start Date	Displays the date from when the rate version to which the rate component belongs is effective.
Tiering Type	Displays the tiering type. The valid values are: • FLAT • STEP • THRESHOLD
Rate Component Map Description	Displays the description of the tiering setup of the rate component.
Rate Component Map ID	Displays the rate component map ID. **Note:** This ID is generated automatically when you define the tiering setup of the rate component.

Note: Pagination is used to display limited number of records in the **Search Results** section. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

On clicking the **Broadcast** (📡) icon corresponding to the rate schedule, the **Create/Edit Rate Definition** zone appears with the details of the respective rate component.

Related Topics

For more information on...	See...
Rate Definition screen	Rate Definition on page 917
Create/Edit Rate Definition zone	Create/Edit Rate Definition on page 918
How to define tiering setup of a rate component	Defining Tiering Setup of a Rate Component on page 920
How to edit tiering setup of a rate component	Editing Tiering Setup of a Rate Component on page 921
How to delete tiering setup of a rate component	Deleting Tiering Setup of a Rate Component on page 922

Create/Edit Rate Definition

The **Create/Edit Rate Definition** zone allows you to define and edit the tiering setup of a rate component. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Rate Schedule	Displays the rate schedule.	Not applicable
Rate Component Description	Displays the description of the rate component.	Not applicable

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Field Name	Field Description	Mandatory (Yes or No)
Effective Start Date	Displays the date from when the rate version to which the rate component belongs is effective.	Not applicable
Rate Component Sequence	Displays the sequence number of the rate component in the rate schedule.	Not applicable
Tiering Type	Used to specify the tiering type. The valid values are: • FLAT • STEP • THRESHOLD **Note:** This field is non-editable when you edit the tiering setup of the rate component.	Yes
Rate Component Map Description	Used to specify the description for the tiering setup of the rate component. For example, if you want the user to enter price per transaction for a tiering range, enter `Price Per Transaction` in the **Rate Component Map Description** field.	Yes

In addition, the **Create/Edit Rate Definition** zone contains the following buttons:

Button Name	Button Description (When the Action is Add)
Save	Used to create the tiering setup for the rate component.
Delete	Used to delete the tiering setup of the rate component. **Note:** You can delete a tiering setup only when the rate component is not yet used for any product pricing. This button is disabled when you are define the tiering setup of the rate component.
Cancel	Used to clear the fields in this zone.

By default, the **Create/Edit Rate Definition** zone does not appear in the **Rate Definition** screen. It appears when you click the **Broadcast** (📡) icon corresponding to a **Rate Schedule** in the **Search Results** section of **Rate Schedule Components** zone.

Related Topics

For more information on...	See...
Rate Definition screen	Rate Definition on page 917
Rate Schedule Components zone	Rate Schedule Components on page 917
How to define tiering setup of a rate component	Defining Tiering Setup of a Rate Component on page 920
How to edit tiering setup of a rate component	Editing Tiering Setup of a Rate Component on page 921
How to delete tiering setup of a rate component	Deleting Tiering Setup of a Rate Component on page 922

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Defining Tiering Setup of a Rate Component

Prerequisites

To define tiering setup of a rate component, you should have:

- Rate schedules defined in the application
- Rate components of the rate schedule defined in the application

Procedure

To define tiering setup of a rate component:

1. Click the **Menu** (☰) icon in the **Application** toolbar.
   A drawer appears.
2. From the **Main** menu, select **Rates** and then click **Rate Definition**.
   The **Rate Definition** screen appears.
3. Select the rate schedule in the **Rate Schedule Components** zone.
4. Click **Search**.
   The rate components of the rate schedule appear in the **Search Results** section.
5. Click the **Broadcast** (📡) icon corresponding to the rate component whose tiering setup you want to define.

   The **Create/Edit Rate Definition** zone appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Rate Schedule	Displays the rate schedule.	Not applicable
Rate Component Description	Displays the description of the rate component.	Not applicable
Effective Start Date	Displays the date from when the rate version to which the rate component belongs is effective.	Not applicable
Rate Component Sequence	Displays the sequence number of the rate component in the rate schedule.	Not applicable
Tiering Type	Used to specify the tiering type. The valid values are: • FLAT • STEP • THRESHOLD **Note:** This field is non-editable when you edit the tiering setup of the rate component.	Yes
Rate Component Map Description	Used to specify the description for the tiering setup of the rate component. For example, if you want the user to enter price per transaction for a tiering range, enter `Price Per Transaction` in the **Rate Component Map Description** field.	Yes

6. Select the tiering type from the **Tiering Type** list.
7. Enter the description for the tiering setup of the rate component in the **Rate Component Map Description** field.

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For example, if you want the user to enter price per transaction for a tiering range, enter `Price Per Transaction` in the **Rate Component Map Description** field.

8. Click **Save**.
   The tiering setup of a rate component is defined.

> **Note:** The rate component map ID is generated automatically when you define the tiering setup of the rate component.

Related Topics

For more information on...	See...
Rate Definition screen	Rate Definition on page 917
Rate Schedule Components zone	Rate Schedule Components on page 917
Create/Edit Rate Definition zone	Create/Edit Rate Definition on page 918

Editing Tiering Setup of a Rate Component

Procedure

To edit tiering setup of a rate component:

1. Click the **Menu** (☰) icon in the **Application** toolbar.
   A drawer appears.
2. From the **Main** menu, select **Rates** and then click **Rate Definition**.
   The **Rate Definition** screen appears.
3. Select the rate schedule in the **Rate Schedule Components** zone.
4. Click **Search**.
   The rate components of the rate schedule appear in the **Search Results** section.
5. Click the **Broadcast** (📡) icon corresponding to the rate schedule whose tiering setup you want to edit.

   The **Create/Edit Rate Definition** zone appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Rate Schedule	Displays the rate schedule.	Not applicable
Rate Component Description	Displays the description of the rate component.	Not applicable
Effective Start Date	Displays the date from when the rate version to which the rate component belongs is effective.	Not applicable
Rate Component Sequence	Displays the sequence number of the rate component in the rate schedule.	Not applicable
Tiering Type	Indicates the tiering type. The valid values are: • FLAT • STEP • THRESHOLD	Not applicable

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Field Name	Field Description	Mandatory (Yes or No)
Rate Component Map Description	Used to specify the description for the tiering setup of the rate component. For example, if you want the user to enter price per transaction for a tiering range, enter `Price Per Transaction` in the **Rate Component Map Description** field.	Yes

6. Modify the description for the tiering setup of the rate component in the **Rate Component Map Description** field.
7. Click **Save**.
   The change made to the tiering setup is saved.

Related Topics

For more information on...	See...
Rate Definition screen	Rate Definition on page 917
Rate Schedule Components zone	Rate Schedule Components on page 917
Create/Edit Rate Definition zone	Create/Edit Rate Definition on page 918

Deleting Tiering Setup of a Rate Component

Procedure

To delete tiering setup of a rate component:

1. Click the **Menu** (☰) icon in the **Application** toolbar.
   A drawer appears.
2. From the **Main** menu, select **Rates** and then click **Rate Definition**.
   The **Rate Definition** screen appears.
3. Select the rate schedule in the **Rate Schedule Components** zone.
4. Click **Search**.
   The rate components of the rate schedule appear in the **Search Results** section.
5. Click the **Broadcast** (📡) icon corresponding to the rate schedule whose tiering setup you want to delete.
   The **Create/Edit Rate Definition** zone appears.
6. Click **Delete**.

   The tiering setup of the rate component is deleted, and the action that can be performed on the rate component changes from **Edit** to **Add** in the **Rate Schedule Components** zone.

> **Note:**
>
> The **Delete** button is disabled when you are defining the tiering setup of the rate component.
>
> You can delete the tiering setup only when the rate component is not yet used for any product pricing.

Related Topics

For more information on...	See...
Rate Definition screen	Rate Definition on page 917

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For more information on...	See...
Rate Schedule Components zone	Rate Schedule Components on page 917
Create/Edit Rate Definition zone	Create/Edit Rate Definition on page 918

Tiering Criterion

Oracle Revenue Management and Billing (ORMB) provides you with the ability to create tiered pricing in case standard flat pricing is not sufficient to meet the business needs. Through tiered pricing, you can offer more favorable pricing to the customers based on service quantity utilization.

Let us understand this with the help of an example. ABC company uses wire transfer services provided by a large bank. If ABC company initiates up to 1,000 wire transfers, the fee charged by the bank will be $5 per transfer. If ABC company initiates more than 1,000 wire transfers, the fee will be $3 per transfer. To introduce this flexibility in the pricing model, you will have to define tiered pricing with the following tiering ranges:

- If the number of wire transfers is greater than 0 and less than or equal to 1000, then charge $5 per transfer to ABC company.
- If the number of wire transfers is greater than 1000, then charge $3 per transfer to ABC company.

In the above example, number of wire transfers is the tiering criterion, 0 - 1000 and 1000 - BLANK are tiering ranges, and $5 and $3 are rates per transfer.

The **Tiering Criterion** screen allows you to create and edit a tiering criteria. It contains the following zones:

- Create Tiering Criterion on page 924
- Tiering Criterion List on page 923
- Edit Tiering Criterion on page 924

Tiering Criterion List

The **Tiering Criterion List** zone lists the tiering criterion that are already defined in the system. It contains the following columns:

Column Name	Column Description
Tiering Criterion	Displays the tiering criterion.
Description	Displays the description of the tiering criterion.
Service Quantity Identifier	Displays the Service Quantity Identifier (SQI) associated with the tiering criterion.

On clicking the **Broadcast** (ᯤ) icon corresponding to the tiering criterion, the **Edit Tiering Criterion** zone appears with the details of the respective tiering criterion.

Note: Pagination is used to display limited number of records in the **Search Results** section. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

You can change the layout of this zone. For more information on how to change the layout, see Changing the Layout on page 4410.

Related Topics

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For more information on...	See...
Edit Tiering Criterion zone	Edit Tiering Criterion on page 924

Edit Tiering Criterion

The **Edit Tiering Criterion** zone allows you to edit the details of the tiering criterion. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Tiering Criteria	Displays the tiering criterion.	Not applicable
Tiering Criterion Description	Used to modify the description of the tiering criterion.	Yes
Service Quantity Identifier	Indicates the Service Quantity Identifier (SQI) associated with the tiering criterion.	Not applicable

In addition, the **Edit Tiering Criterion** zone contains the following buttons:

Button Name	Button Description
Save	Used to save the changes made to the tiering criterion.
Cancel	Used to clear the changes made to the tiering criterion.

By default, the **Edit Tiering Criterion** zone does not appear in the **Tiering Criterion** screen. It appears when you click the **Broadcast** (ᯤ) icon corresponding to the tiering criterion in the **Tiering Criterion List** zone.

Related Topics

For more information on...	See...
Tiering Criterion screen	Tiering Criterion on page 923
Tiering Criterion List zone	Tiering Criterion List on page 923
How to edit a tiering criterion	Editing a Tiering Criterion on page 925

Create Tiering Criterion

The **Create Tiering Criterion** zone allows you to create a tiering criterion. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Tiering Criterion	Used to specify the tiering criterion.	Yes
Description	Used to specify the description for the tiering criterion.	Yes
Service Quantity Identifier	Used to indicate the Service Quantity Identifier (SQI) that you want to associate with the tiering criterion. **Note:** During billing, the rating engine uses the SQI to determine which service quantities are applied to tiers.	Yes

In addition, the **Create Tiering Criterion** zone contains the following buttons:

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Button Name	Button Description
Save	Used to create the tiering criterion.
Cancel	Used to clear the fields in this zone.

Related Topics

For more information on...	See...
How to create a tiering criterion	Creating a Tiering Criterion on page 925

Creating a Tiering Criterion

Prerequisites

To create a tiering criterion, you should have:

- Service Quantity Identifiers (SQIs) defined in the application

Procedure

To create a tiering criterion:

1. Click the **Menu** (≡) icon in the **Application** toolbar.
   A drawer appears.
2. From the **Main** menu, select **Pricing Management** and then click **Tiering Criteria**.
   The **Tiering Criterion** screen appears.
3. Ensure that the **Create Tiering Criterion** zone is expanded in the **Tiering Criterion** screen

   The **Create Tiering Criterion** zone contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Tiering Criterion	Used to specify the tiering criterion.	Yes
Description	Used to specify the description for the tiering criterion.	Yes
Service Quantity Identifier	Used to indicate the Service Quantity Identifier (SQI) that you want to associate with the tiering criterion.	Yes

4. Enter the required details in the **Create Tiering Criterion** zone.
5. Click **Save**.
   The tiering criterion is created.

Related Topics

For more information on...	See...
Tiering Criterion screen	Tiering Criterion on page 923
Create Tiering Criterion zone	Create Tiering Criterion on page 924

Editing a Tiering Criterion

Procedure

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To edit a tiering criterion:

1. Ensure that the **Tiering Criterion List** zone is expanded in the **Tiering Criterion** screen.
2. Click the **Broadcast** (📡) icon corresponding to the tiering criterion whose *d*etails you want to edit.
   The **Edit Tiering Criterion** zone appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Tiering Criterion	Displays the tiering criterion.	Not applicable
Description	Used to specify the description of the tiering criterion.	Yes
Service Quantity Identifier	Displays the Service Quantity Identifier (SQI) associated with the tiering criterion.	Not applicable

3. Modify the details of the tiering criterion, if required.
4. Click **Save**.
   The changes made to the tiering criterion are saved.

Related Topics

For more information on...	See...
Tiering Criterion screen	Tiering Criterion on page 923
Edit Tiering Criterion zone	Edit Tiering Criterion on page 924

Chapter 12

Division

Topics:

- Division
- Division Group

The following two types of divisions are used while defining a contract type:

- **General Ledger (GL) Division** - GL divisions typically comprise of individual entities (for example, companies) in the general ledger. You must set up a GL division for each such entity. The GL division is used to define the accounting period for financial transactions linked to contracts. Contracts are associated with GL divisions through their contract type. The system uses accounting periods to prevent a user from creating financial transactions in the closed periods. It also uses accounting periods when it generates the flat file that contains the consolidated journal entry that is interfaced to the general ledger.
- **Division** - A division is associated with a jurisdiction. A jurisdiction is a geographic-oriented entity with unique business rules. For example, if you conduct business in California and Japan, each jurisdiction has different set of rules, and therefore you need to have a separate jurisdiction for each division. You must set up a division for each jurisdiction in which you conduct the business. For the Pricing Management functionality, setting up a division is mandatory, and the system must contain information about at least one division.

A division is associated with the following:

- **Person** - You may or may not associate person to a division. It is optional. But, when you are using division specific functionality, you have to associate person to a division while creating a local person.
- **Contract** - Contract is associated to a division through its contract type. The contract type controls multiple business rules which are defined for a given jurisdiction and contract type combination. In addition to controlling the business rules defined on the contract's contract type, the contract's division also controls the type of collection criteria used to determine if and how to collect overdue debt.
- **Account** - The division on account when combined with the account's customer class defines the jurisdiction that governs financial business rules (for example, the bill's due date, when and how late payment charges are calculated, etc.). It also allows you to assign To Do entries associated with the account to a given To Do role based on the account's division.

The system also enables you to group one or more divisions into a geographic region or segment. For more information, see Division Group on page 962.

Division

The **Division** screen allows you to define, edit, and delete a division. It consists of the following tabs:

Tab Name	Tab Description	Mandatory (Yes or No)
Main	Used to define basic details of a division.	Yes
Access Groups	Used to define the users who have right to associate objects (such as persons, accounts, price items, price lists, etc.) with this division. The users can only view those divisions to which they have access in the **Division** list used across the application.	No
Price Items	Used to define which price items are available to persons or accounts in a division. **Note:** Once the price item is created, you need to associate it with a division.	No
Price Lists	Used to define which price lists are available to persons or accounts in a division. **Note:** Once the price list is created, you need to associate it with a division. You can associate a price list with a division when all price items in the price list are already associated with the division.	No
Languages	Used to limit the languages that you can select for a person's bills and correspondence in a division.	No
Invoice Currencies	Used to limit the invoice currencies that you can select for accounts in a division. **Note:** Invoice currency is a currency in which the accounts in the division can be billed.	No
Person Identifier Types	Used to limit the person identifier types that you can select for persons in a division.	No
Algorithms	Used to associate algorithms with the division. Once a division is created, you must associate the **Price Assignment Search** algorithm to it. For the Banking functionality, this is required to ensure that the price item pricing is displayed in the correct order as defined by the algorithm. Each division can have unique hierarchy order or more than one division can have the same hierarchy order. The hierarchy order is also used in billing when the price determination is controlled by the sort order definition of the algorithm.	No

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Tab Name	Tab Description	Mandatory (Yes or No)
	You can define algorithms in the **Algorithm** screen. The search order is governed by the second parameter of the algorithm, and the valid values for the same are: • **AGREED_PRICELIST** - If you use this search order, the price item pricing is searched in the following order: Account Agreed, Account Price List, Account Inherited Price List, Customer Agreed, Customer Price List, Customer Inherited Price List, Parent Customer Agreed, Parent Customer Price List, and Parent Customer Inherited Price List. **Note:** In this search order, the account agreed level has highest precedence and parent customer inherited price list level has lowest precedence. • **AGREED_FIRST** - If you use this search order, the price item pricing is searched in the following order: Account Agreed, Customer Agreed, Parent Customer Agreed, Account Price List, Account Inherited Price List, Customer Price List, Customer Inherited Price List, Parent Customer Price List, and Parent Customer Inherited Price List. **Note:** In this search order, the account agreed level has highest precedence and parent customer inherited price list level has lowest precedence.	
Characteristics	Used to define the characteristics for a division.	No
Bill Messages	Used to specify the bill messages that are valid for accounts in a division.	No
Party Char Types	Used to limit the characteristic types that you can select for persons and accounts in a division.	No
Bill Cycles	Used to limit the bill cycles that you can select for accounts in a division.	No
Account Identifier Types	Used to limit the account identifier types that you can select for accounts in a division.	No
Price Item Characteristics	Used to define division-specific characteristics for price items associated with the division.	No

Division - Main

The **Main** tab displays the basic information about the division. It contains the following fields:

Field Name	Field Description
Division	Indicates the division.

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Field Name	Field Description
	Note: The **Search** (🔍) icon appears corresponding to the **Division** field. On clicking the **Search** icon, the **Division Search** window appears where you can search for a division.
Description	Displays the description of the division.
Work Calendar	Indicates the work calendar which is associated with the division.
Status	Indicates the status of the division. The valid values are: • Active • Pending • Retired
Bill Format	Indicates the format in which the bills should be printed for the accounts which belong to the division. The valid values are: • Detailed • Summary
Bill Route Type	Indicates how the bills must be sent to the main customer of the accounts which belong to the division.
Base Currency	Indicates the currency in which the GL entries should be created for the accounts which belong to the division.
Time Zone	Indicates the time zones in which the division is operational.
Eligible for Accrual	Indicates whether accrual should be calculated for the accounts which belong to the division.
Accrual Cycle	Indicates the accrual cycle of the accounts which belong to the division.
Direct Credit Refund	Indicates whether you want to initiate immediate refund for the accounts through the direct credit refund mode.
A/P Request Fund	Indicates whether you want to initiate immediate refund for the accounts through the A/P request mode.
Immediate Refund	Indicates whether you want to initiate immediate refund for the accounts belonging to the division.
Local Currency	Indicates the currency that you want to use as local currency for the division.
Comments	Displays additional details about the division.
Business Object	Indicates the business object using which the division is created in the system.

In addition, the **Main** tab contains the following fields in a grid:

Field Name	Field Description
To Do Type	Indicates the To Do type for which division-specific To Do role is defined.
To Do Role	Indicates the To Do role whose users must receive the To Do entries of the specified To Do type for the accounts which belong to the division.

Related Topics

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For more information on...	See...
How to define a division	Defining a Division on page 937

Division - Access Groups

The **Access Groups** tab lists the access groups which are associated with the division. It contains the following field:

Field Name	Field Description
Division	Indicates the division.

In addition, the following fields appear in a grid:

Field Name	Field Description
Access Group	Indicates the access group which is associated with the division.
Description	Displays the description of the access group.

Related Topics

For more information on...	See...
How to associate an access group with a division	Associating an Access Group with a Division on page 941

Division - Price Items

The **Price Items** tab lists the price items which are associated with the division. It contains the following field:

Field Name	Field Description
Division	Indicates the division.

In addition, the following fields appear in a grid:

Field Name	Field Description
Price Item	Indicates the price item which is associated with the division.
Description	Displays the description of the price item.
Accrual Type Criteria	Indicates whether the billable charges of the price item should be considered for accrual depending on the accrual criteria specified in the accrual type. The valid values are: • Actual • Historical • Not Applicable

Related Topics

For more information on...	See...
How to associate a price item with a division	Associating a Price Item or Price Item Bundle with a Division on page 942

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Division - Price Lists

The **Price Lists** tab lists the price lists which are associated with the division. It contains the following field:

Field Name	Field Description
Division	Indicates the division.

In addition, the following fields appear in a grid:

Field Name	Field Description
Price List ID	Indicates the price list.
Description	Displays the description of the price list.

Related Topics

For more information on...	See...
How to associate a price list with a division	Associating a Price List with a Division on page 944

Division - Languages

The **Languages** tab lists the languages which you can select for generating invoice and correspondence for the accounts in the division. It contains the following field:

Field Name	Field Description
Division	Indicates the division.

In addition, the following field appears in a grid:

Field Name	Field Description
Language	Indicates the language associated with the division.

Related Topics

For more information on...	See...
How to associate a language with a division	Associating a Language with a Division on page 945

Division - Invoice Currencies

The **Invoice Currencies** tab lists the currencies which you can use for generating the invoice of the accounts in the division. It contains the following field:

Field Name	Field Description
Division	Indicates the division.

In addition, the following fields appear in a grid:

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Field Name	Field Description
Currency	Indicates the currency.
Rounding Type	Indicates the rounding type for the currency. The valid values are: • Down • Nearest • Up

Related Topics

For more information on...	See...
How to associate an invoice currency with a division	Associating an Invoice Currency with a Division on page 946

Division - Person Identifier Types

The **Person Identifier Types** tab lists the identifier types which are valid for the persons associated with the division. It contains the following field:

Field Name	Field Description
Division	Indicates the division.

In addition, the following field appears in a grid:

Field Name	Field Description
Person Identifier Type	Indicates the person identifier type.

Related Topics

For more information on...	See...
How to associate a person identifier type with a division	Associating a Person Identifier Type with a Division on page 947

Division - Algorithms

The **Algorithms** tab lists the algorithms which are associated with the division. It contains the following field:

Field Name	Field Description
Division	Indicates the division.

In addition, the following fields appear in a grid:

Field Name	Field Description
Division Algorithm Entity	Indicates the algorithm entity to which you want to attach the algorithm.
Sequence Number	Displays the order in which the algorithms with the same entity should be executed.

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Field Name	Field Description
Algorithm	Indicates the algorithm.
Description	Displays the description of the algorithm.

Related Topics

For more information on...	See...
How to associate an algorithm with a division	Associating an Algorithm with a Division on page 948

Division - Characteristics

The **Characteristics** tab lists the characteristics which are defined for the division. It contains the following field:

Field Name	Field Description
Division	Indicates the division.

In addition, the following fields appear in a grid:

Field Name	Field Description
Effective Date	Indicates the date from when the characteristic is effective for the division.
Characteristic Type	Indicates the characteristic type.
Characteristic Value	Indicates the value for the characteristic type.

Related Topics

For more information on...	See...
How to define a characteristic for a division	Defining a Characteristic for a Division on page 954

Division - Bill Messages

The **Bill Messages** tab lists the bill messages which are valid for the accounts in the division for a specified duration. It contains the following field:

Field Name	Field Description
Division	Indicates the division.

In addition, the following fields appear in a grid:

Field Name	Field Description
Start Date	Indicates the date from when you want the bill message to appear on the bill.
End Date	Indicates the date till when you want the bill message to appear on the bill.
Bill Message	Indicates the bill message that is valid for the accounts in the division.
Description	Displays the description of the bill message.

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Related Topics

For more information on...	See...
How to associate a bill message with a division	Associating a Bill Message with a Division on page 956

Division - Party Char Types

The **Party Char Types** tab lists the characteristic types which are valid for the persons and accounts associated with the division. It contains the following field:

Field Name	Field Description
Division	Indicates the division.

In addition, the following fields appear in a grid:

Field Name	Field Description
Characteristic Entity	Indicates whether the characteristic type is valid for a person or an account in this division.
Characteristic Type	Indicates the characteristic type.

Related Topics

For more information on...	See...
How to associate a party char type with a division	Associating a Party Characteristic Type with a Division on page 957

Division - Bill Cycles

The **Bill Cycles** tab lists the bill cycles which are valid for the accounts associated with the division. It contains the following field:

Field Name	Field Description
Division	Indicates the division.

In addition, the following field appears in a grid:

Field Name	Field Description
Bill Cycle	Indicates the bill cycle.

Related Topics

For more information on...	See...
How to associate a bill cycle with a division	Associating a Bill Cycle with a Division on page 958

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Division - Account Identifier Types

The **Account Identifier Types** tab lists the identifier types which are valid for the accounts associated with the division. It contains the following field:

Field Name	Field Description
Division	Indicates the division.

In addition, the following field appears in a grid:

Field Name	Field Description
Account Identifier Type	Indicates the account identifier type.

Related Topics

For more information on...	See...
How to associate an account identifier type with a division	Associating an Account Identifier Type with a Division on page 959

Division - Price Item Characteristics

The **Price Item Characteristics** tab lists division-specific characteristics of price items which are associated with the division. It contains the following field:

Field Name	Field Description
Division	Indicates the division.

In addition, the following fields appear in a grid:

Field Name	Field Description
Price Item	Displays the price item count associated with the selected division to which the user belongs.
Price Item	Displays the price item associated with the division to which the user belongs.
Effective Date	Indicates the date from when the price item characteristic is effective for the division.
Characteristic Type	Indicates the characteristic type.
Characteristic Value	Displays the value for the characteristic type.

Related Topics

For more information on...	See...
How to define a division-specific characteristic for a price item	Defining a Division-Specific Characteristic for a Price Item on page 960

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Searching for a Division

Procedure

To search for a division:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **D** and then click **Division**.
   A sub-menu appears.
3. Click the **Search** option from the **Division** sub-menu.
   The **Division Search** window appears. It contains the following two sections:
   - **Search Criteria** - The **Search Criteria** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Division	Used to search for a particular division.	No
Description	Used to search division with a particular name.	No

Note: You must specify at least one search criterion while searching for a division.

   - **Search Results** - On clicking the **Search** button corresponding to the respective field, the search results appear based on the specified search criteria. The **Search Results** section contains the following columns:

Column Name	Column Description
Division	Displays the division.
Description	Displays the description of the division.

Note: ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.

4. In the **Search Results** section, click the division whose details you want to view or edit.
   The **Division** screen appears.

Related Topics

For more information on...	See...
Division screen	Division on page 928

Defining a Division

Prerequisites

To define a division, you should have:

- Required division business object defined in the application
- Work calendars, bill route types, currencies, time zones, accrual cycles, To Do types, and To Do roles defined in the application
- Values defined for the **BILL_FORMAT_FLG** lookup field

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Procedure

To define a division:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **D** and then click **Division**.
   A sub-menu appears.
3. Click the **Add** option from the **Division** sub-menu.
   The **Division** screen appears.
4. Ensure that the **Main** tab is selected.

   The **Main** tab contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Division	Used to specify the division.	Yes
Description	Used to specify the description for the division.	Yes
Work Calendar	Used to indicate the work calendar that you want to associate with the division. The work calendar indicates the days when the division is operational. It is used to ensure that the system calculated dates (for example, bill due date, credit and collection event dates, etc.) fall on a working day. **Note:** The list includes only those work calendars which are already defined in the system.	Yes
Status	Used to indicate the status of the division. The valid values are: • **Active** - Indicates that you can use the division in the system. • **Pending** - Indicates that the division is not yet available for use. • **Retired** - Indicates that the division is no longer available for use. **Note:** The list includes only those statuses which are defined in the **DIVISION_STATUS_FLG** lookup field.	No
Bill Format	Used to specify the format in which the bills should be printed for the accounts which belong to the division. The valid values are: • Detailed • Summary **Note:** The list includes only those bill formats which are defined in the **BILL_FORMAT_FLG** lookup field.	No
Bill Route Type	Used to indicate how the bills must be sent to the main customer of the accounts which belong to the division.	No

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The list includes only those bill route types which are already defined in the system.	
Base Currency	Used to specify the currency in which the GL entries should be created for the accounts which belong to the division. If the account's invoice currency and division's base currency are different, the system converts the GL amount from the account's invoice currency to the division's base currency. In such cases, the system creates the financial transactions for the accounts in both the currencies (i.e. account's invoice currency and division's base currency). **Note:** The list includes only those currencies which are already defined in the system.	Yes
Time Zone	Used to indicate the time zone in which the division is operational. **Note:** The list includes only those time zones which are already defined in the system.	No
Eligible for Accrual	Used to indicate whether you can calculate accrual for the accounts which belong to the division.	No
Accrual Cycle	Used to indicate the accrual cycle for the accounts which belong to the division. **Note:** This field is enabled when the **Eligible for Accrual** option is selected. The **Search** (🔍) icon appears corresponding to the **Accrual Cycle** field. On clicking the **Search** icon, the **Accrual Cycle Search** window appears.	Yes (Conditional) **Note:** The field is required when the **Eligible for Accrual** option is selected.
Direct Credit Refund	Used to indicate whether you want to initiate immediate refund for the accounts through the direct credit refund mode.	No
A/P Request Fund	Used to indicate whether you want to initiate immediate refund for the accounts through the A/P request mode.	No
Immediate Refund	Used to indicate whether you want to initiate immediate refund for the accounts belonging to the division. **Note:** This field is enabled when the **Direct Credit Refund** or **A/P Request Fund** option is selected.	No
Local Currency	Used to indicate the currency that you want to use as local currency for the division. The system will then consider the division’s local currency	No

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Field Name	Field Description	Mandatory (Yes or No)
	as the GL's reporting currency and accordingly create an additional FT GL entry (i.e., FT GL extension record) in the division's local currency. You must specify the local currency only when it is different from the division's base currency. For more information, see FT GL in GL's Reporting Currency (i.e., Division's Local Currency). **Note:** You must specify a currency which is already defined in the system. You can add the division's local currency in the **Invoice Currencies** tab and define its rounding method for accurate calculations.	
Comments	Used to specify additional details about the division.	No
Business Object	Used to indicate the business object using which you want to create the division. **Note:** The **Search** (🔍) icon appears corresponding to the **Business Object** field. On clicking the **Search** icon, the **Business Object Search** window appears.	Yes

In addition, the **Main** tab contains the following fields in a grid:

Field Name	Field Description	Mandatory (Yes or No)
To Do Type	Used to indicate the To Do type for which you want to define division-specific To Do role. **Note:** The **Search** (🔍) icon appears corresponding to the **To Do Type** field. On clicking the **Search** icon, the **To Do Type Search** window appears.	Yes (Conditional) **Note:** This field is required when you are defining the division-specific To Do role for a To Do type.
To Do Role	Used to indicate the To Do role whose users must receive the To Do entries of the specified To Do type for the accounts which belong to the division. **Note:** The **Search** (🔍) icon appears corresponding to the **To Do Role** field. On clicking the **Search** icon, the **Role for To Do Type** window appears.	Yes (Conditional) **Note:** This field is required when you are defining the division-specific To Do role for a To Do type.

5. Enter the required details in the **Main** tab.
6. Associate access groups, price items, price lists, languages, invoice currencies, person identifier types, *a*lgorithms, bill messages, party characteristic types, bill cycles, and account identifier types with the division, if *r*equired.
7. Define characteristics for the division, if required.
8. Define division-specific characteristics for the price items, if required.
9. Click the **Save** button in the **Page Title** area.
   The division is defined. The status of the division is set to **Pending**.

Related Topics

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For more information on...	See...
Division screen	Division on page 928
Main tab	Division - Main on page 929
How to associate an access group with a division	Associating an Access Group with a Division on page 941
How to associate a price item with a division	Associating a Price Item or Price Item Bundle with a Division on page 942
How to associate a price list with a division	Associating a Price List with a Division on page 944
How to associate a language with a division	Associating a Language with a Division on page 945
How to associate an invoice currency with a division	Associating an Invoice Currency with a Division on page 946
How to associate a person identifier type with a division	Associating a Person Identifier Type with a Division on page 947
How to associate an algorithm with a division	Associating an Algorithm with a Division on page 948
How to define a characteristic for a division	Defining a Characteristic for a Division on page 954
How to associate a bill message with a division	Associating a Bill Message with a Division on page 956
How to associate a party characteristic type with a division	Associating a Party Characteristic Type with a Division on page 957
How to associate a bill cycle with a division	Associating a Bill Cycle with a Division on page 958
How to associate an account identifier type with a division	Associating an Account Identifier Type with a Division on page 959
How to define a division-specific characteristic for a price item	Defining a Division-Specific Characteristic for a Price Item on page 960

Associating an Access Group with a Division

On associating an access group with a division, the users which belong to the access group can view the division in the respective list across the system. These users can then create and edit the accounts of the division.

Prerequisites

To associate an access group with a division, you should have:

- Access groups defined in the application

Procedure

To associate an access group with a division:

1. Search for the division to which you want to associate an access group.
2. Click the **Access Groups** tab in the **Division** screen.

   The **Access Groups** tab appears. It contains the following field:

Field Name	Field Description
Division	Indicates the division.

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Field Name	Field Description
	Note: The **Search** (🔍) icon appears corresponding to the **Division** field. On clicking the **Search** icon, the **Division Search** window appears where you can search for a division.

In addition, it contains the following fields in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Access Group	Used to indicate the access group which you want to associate with the division.	Yes (Conditional)
	Note: The **Search** (🔍) icon appears corresponding to the **Access Group** field. On clicking the **Search** icon, the **Access Group Search** window appears. On specifying an access group, the description of the access group appears in the **Description** field.	**Note:** This field is required when you are associating an access group with the division.
Description	Displays the description of the access group.	Not applicable

3. Enter the required details in the **Access Groups** tab.
4. If you want to associate more than one access group with the division, click the **Add** (+) icon and then repeat *s*tep 3.

Note: However, if you want to remove an access group from the division, click the **Delete** (🗑) icon corresponding to the access group.

5. Click the **Save** button in the **Page Title** area.
   The access group is associated with the division.

Related Topics

For more information on...	See...
How to search for a division	Searching for a Division on page 937
Division screen	Division on page 928
Access Groups tab	Division - Access Groups on page 931
How to define a division	Defining a Division on page 937

Associating a Price Item or Price Item Bundle with a Division

On associating a price item with a division, you can assign the price item to the persons and accounts which belong to the division. While associating a price item with a division, you can specify the accrual type criteria for the price item. The accrual type criteria is referred when the accrual is calculated for an account using an accrual type where the **Price Item Accrual Criteria Required** option is selected. The system behaves in the following manner when the **Price Item Accrual Criteria Required** option is selected in the accrual type:

If the accrual type criteria is set to...	Then...
Actual	The system considers the billable charges of the price item when the accrual is calculated for an account using the accrual type where the accrual criteria is set to **Actual**.

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If the accrual type criteria is set to...	Then...
Historical	The system considers the billable charges of the price item when the accrual is calculated for an account using the accrual type where the accrual criteria is set to **Historical**.

Prerequisites

To associate a price item with a division, you should have:

- Price items defined in the application

Procedure

To associate a price item with a division:

1. Search for the division to which you want to associate a price item.
2. Click the **Price Items** tab in the **Division** screen.

   The **Price Items** tab appears. It contains the following field:

Field Name	Field Description
Division	Indicates the division.
	Note: The **Search** (🔍) icon appears corresponding to the **Division** field. On clicking the **Search** icon, the **Division Search** window appears where you can search for a division.

   In addition, it contains the following fields in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Price Item	Used to indicate the price item which you want to associate with the division.	Yes (Conditional)
	Note: The **Search** (🔍) icon appears corresponding to the **Price Item** field. On clicking the **Search** icon, the **Price Item Search** window appears. On specifying a price item, the description of the price item appears in the **Description** field.	**Note:** This field is required when you are associating a price item with the division.
Description	Displays the description of the price item.	Not applicable
Accrual Type Criteria	Used to indicate whether the billable charges of the price item should be considered for accrual depending on the accrual criteria specified in the accrual type. The valid values are: • **Actual** - Used to indicate that the billable charges of the price item should be considered for accrual when the accrual criteria in the accrual type is set to **Actual**. • **Historical** - Used to indicate that the billable charges of the price item should be considered for accrual when	No

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Field Name	Field Description	Mandatory (Yes or No)
	the accrual criteria in the accrual type is set to **Historical**. • **Not Applicable** - Used to indicate that the billable charges of the price item should be considered for accrual irrespective of the accrual criteria specified in the accrual type	

3. Enter the required details in the **Price Items** tab.
4. If you want to associate more than one price item with the division, click the **Add** (+) icon and then repeat step *3*.

Note: However, if you want to remove a price item from the division, click the **Delete** (🗑) icon corresponding to the price item.

5. Click the **Save** button in the **Page Title** area.
   The price item is associated with the division.

Related Topics

For more information on...	See...
How to search for a division	Searching for a Division on page 937
Division screen	Division on page 928
Price Items tab	Division - Price Items on page 931
How to define a division	Defining a Division on page 937

Associating a Price List with a Division

Prerequisites

To associate a price list with a division, you should have:

- Price lists defined in the application

Procedure

To associate a price list with a division:

1. Search for the division to which you want to associate a price list.
2. Click the **Price Lists** tab in the **Division** screen.

   The **Price Lists** tab appears. It contains the following field:

Field Name	Field Description
Division	Indicates the division.
	Note: The **Search** (🔍) icon appears corresponding to the **Division** field. On clicking the **Search** icon, the **Division Search** window appears where you can search for a division.

   In addition, it contains the following fields in a grid:

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Field Name	Field Description	Mandatory (Yes or No)
Price List ID	Used to specify the price list which you want to associate with the division. **Note:** The **Search** (🔍) icon appears corresponding to this field. On clicking the **Search** icon, the **Price List Search** window appears. On specifying a price list, the description of the price list appears in the **Description** field.	Yes (Conditional) **Note:** This field is required when you are associating a price list with a division.
Description	Displays the description of the price list.	Not applicable

3. Enter the required details in the **Price Lists** tab.
4. If you want to associate more than one price list with the division, click the **Add** (+) icon and then repeat step *3*.

Note: However, if you want to remove a price list from the division, click the **Delete** (🗑) icon corresponding to the price list.

5. Click the **Save** button in the **Page Title** area.
   The price list is associated with the division.

Related Topics

For more information on...	See...
How to search for a division	Searching for a Division on page 937
Price Lists tab	Division - Price Lists on page 932
Division screen	Division on page 928
How to define a division	Defining a Division on page 937

Associating a Language with a Division

Prerequisites

To associate a language with a division, you should have:

- Languages defined in the application

Procedure

To associate a language with a division:

1. Search for the division to which you want to associate a language.
2. Click the **Languages** tab in the **Division** screen.

   The **Languages** tab appears. It contains the following field:

Field Name	Field Description
Division	Indicates the division. **Note:** The **Search** (🔍) icon appears corresponding to the **Division** field. On clicking the **Search** icon, the **Division Search** window appears where you can search for a division.

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In addition, it contains the following field in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Language	Used to specify the language which you want to select for generating invoice and correspondence for the accounts in the division.	No

3. Select the language from the list.
4. If you want to associate more than one language with the division, click the **Add** (+) icon and then repeat step *3*.

> **Note:** However, if you want to remove a language from the division, click the **Delete** (🗑) icon corresponding to the language.

5. Click the **Save** button in the **Page Title** area.
   The language is associated with the division.

Related Topics

For more information on...	See...
How to search for a division	Searching for a Division on page 937
Languages tab	Division - Languages on page 932
Division screen	Division on page 928
How to define a division	Defining a Division on page 937

Associating an Invoice Currency with a Division

Prerequisites

To associate an invoice currency with a division, you should have:

- Currencies defined in the application

Procedure

To associate an invoice currency with a division:

1. Search for the division to which you want to associate an invoice currency.
2. Click the **Invoice Currencies** tab in the **Divisions** screen.

   The **Invoice Currencies** tab appears. It contains the following field:

Field Name	Field Description
Division	Indicates the division.
	Note: The **Search** (🔍) icon appears corresponding to the **Division** field. On clicking the **Search** icon, the **Division Search** window appears where you can search for a division.

   In addition, it contains the following fields in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Currency	Used to indicate the currency which you want to use for generating the invoice of the accounts in the division.	Yes (Conditional)

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Field Name	Field Description	Mandatory (Yes or No)
		Note: This field is required when you are associating an invoice currency with the division.
Rounding Type	Used to indicate the rounding type for the currency. The valid values are: • Down • Nearest • Up	Yes (Conditional) **Note:** This field is required when you are associating an invoice currency with the division.

3. Select the currency and its rounding type from the respective list.
4. If you want to associate more than one invoice currency with the division, click the **Add** (+) icon and then *r*epeat step 3.

Note: However, if you want to remove an invoice currency from the division, click the **Delete** (🗑) icon corresponding to the currency.

5. Click the **Save** button in the **Page Title** area.
   The invoice currency is associated with the division.

Related Topics

For more information on...	See...
How to search for a division	Searching for a Division on page 937
Invoice Currencies tab	Division - Invoice Currencies on page 932
Division screen	Division on page 928
How to define a division	Defining a Division on page 937

Associating a Person Identifier Type with a Division

Prerequisites

To associate a person identifier type with a division, you should have:

- Person identifier types defined in the application

Procedure

To associate a person identifier type with a division:

1. Search for the division to which you want to associate a person identifier type.
2. Click the **Person Identifier Types** tab in the **Division** screen.

   The **Person Identifier Types** tab appears. It contains the following field:

Field Name	Field Description
Division	Indicates the division.

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Field Name	Field Description
	Note: The **Search** (🔍) icon appears corresponding to the **Division** field. On clicking the **Search** icon, the **Division Search** window appears where you can search for a division.

In addition, it contains the following field in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Person Identifier Type	Used to indicate the person identifier type.	Yes (Conditional) **Note:** This field is required when you are associating a person identifier type with a division.

3. Select the person identifier type from the list.
4. If you want to associate more than one person identifier type with the division, click the **Add** (+) icon and *t*hen repeat step 3.

Note: However, if you want to remove a person identifier type from the division, click the **Delete** (🗑) icon corresponding to the person identifier type.

5. Click the **Save** button in the **Page Title** area.
   The person identifier type is associated with the division.

Related Topics

For more information on...	See...
How to search for a division	Searching for a Division on page 937
Person Identifier Types tab	Division - Person Identifier Types on page 933
Division screen	Division on page 928
How to define a division	Defining a Division on page 937

Associating an Algorithm with a Division

Prerequisites

To associate an algorithm with a division, you should have:

- Required algorithms defined in the application

Procedure

To associate an algorithm with a division:

1. Search for the division to which you want to associate the algorithm.
   The **Division** screen appears.
2. Click the **Algorithms** tab.

   The **Algorithms** tab appears. It contains the following field:

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Field Name	Field Description
Division	Indicates the division.
	Note: The **Search** (🔍) icon appears corresponding to the **Division** field. On clicking the **Search** icon, the **Division Search** window appears where you can search for a division.

In addition, it contains the following fields in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Division Algorithm Entity	Used to indicate the algorithm entity to which you want to attach the algorithm. The valid values are: • **ASL Accumulation Post-Processing** - Used to attach an algorithm which must be triggered for undertaking some post-processing activities on the aggregate stop-loss accumulation amount. This algorithm is invoked when you execute the **C1-ACASL** batch. **Note:** No algorithm types for this algorithm entity are shipped with the product. The implementation team can create custom algorithm type for this algorithm entity based on the customer requirements. • **ASL Accumulation Pre-Processing** - Used to attach an algorithm which must be triggered for undertaking some pre-processing activities on the aggregate stop-loss accumulation records. This algorithm is invoked when you execute the **C1-ACASL** batch. **Note:** No algorithm types for this algorithm entity are shipped with the product. The implementation team can create custom algorithm type for this algorithm entity based on the customer requirements. • **Account - Post Processing** - Used to attach an algorithm which must be triggered when you create or edit an account. **Note:** The **C1-CLSACCT** and **C1-UACM-IC** algorithm types are shipped with the product. For more information, see the algorithm type description. • **Accrual** - Used to attach an algorithm which must be triggered to create the accruals for the account. • **Contract Derivation** - Used to attach an algorithm which must be triggered to derive active contract for the account. This algorithm is invoked when you execute the **C1-TXNVP** batch. Note that this algorithm is invoked only when the account has multiple active contracts	Yes (Conditional) **Note:** This field is required when you are associating an algorithm with the division.

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Field Name	Field Description	Mandatory (Yes or No)
	of the contract type which is associated with the price item. **Note:** The **SA_DERV_POPC** algorithm type is shipped with the product. For more information, see the algorithm type description.	
	• **Currency Conversion For Adjustments** - Used to attach a date or date and time based currency conversion algorithm that must be triggered while creating adjustments and FT GL entries for adjustments. **Note:** The **C1_CURALGAD** and **C1_EXCRTAD** algorithm types are shipped with the product. For more information, see C1_CURALGAD on page 1595 and C1_EXCRTAD on page 1596. • **Currency Conversion For Bill Segments** - Used to attach a date or date and time based currency conversion algorithm that must be triggered while creating bill segments and FT GL entires for bill segments. **Note:** The **C1_CURALGBS** and **C1_EXCRTBS** algorithm types are shipped with the product. For more information, see C1_CURALGBS on page 1591 and C1_EXCRTBS on page 1593. • **Currency Conversion For Payments** - Used to attach a date or date and time based currency conversion algorithm that must be triggered while creating payments, payment tenders, and FT GL entries for payments. **Note:** The **C1_CURALGPY** and **C1_EXCRTPY** algorithm types are shipped with the product. For more information, see C1_CURALGPY and C1_EXCRTPY. • **GL Account Validation** - Used to attach an algorithm which must be triggered during dynamic GL account validation. **Note:** The **C1-GLVAL** and **C1-GLVAL-COB** algorithm types are shipped with the product. For more information, see the algorithm type description. • **Immediate Refund Creation** - Used to attach an algorithm that must be triggered to initiate automatic refund when you complete a credit bill or freeze a credit adjustment or overpayment of an account.	

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The **C1-IMREFCRET** algorithm type is shipped with the product. For more information, see C1-IMREFCRET. • **Price Assignment Eligibility** - Used to attach an algorithm which must be triggered to determine whether the post-processing pricing is eligible for the account. This algorithm is invoked when you execute the **C1-BLPPR** and **POSTPROC** batches. **Note:** This algorithm is invoked while executing these batches when an algorithm created using the **C1-GENBSICPA** algorithm type is attached to the **Post-Processing (Billing)** algorithm spot of the respective contract type. The **C1-ELIGPROR** algorithm type is shipped with the product. For more information, see the algorithm type description.	
	• **Price Assignment Search** - Used to attach an algorithm which indicates the order in which the price item pricing must be determined while billing. It also indicates the order in which the price item pricing must be listed in the **Pricing (Account)** and **Pricing (Person)** screens. **Note:** The **C1_PRASN_PP** algorithm type is shipped with the product. For more information, see the algorithm type description. • **Sequential Bill Number Generation** - Used to attach an algorithm which indicates how to sequence alternate bill numbers which are unique within the division. **Note:** The **C1_ALTBLLDIV** and **C1_ALTBLDIV1** algorithm types are shipped with the product. For more information, see the algorithm type description. • **SSL Accumulation Pre-Processing** - Used to attach an algorithm which must be triggered for undertaking some pre-processing activities on the aggregate stop-loss accumulation records. This algorithm is invoked when you execute the **C1-ACSSL** batch. **Note:** No algorithm types for this algorithm entity are shipped with the product. The implementation team can create custom algorithm type for this algorithm entity based on the customer requirements.	

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Field Name	Field Description	Mandatory (Yes or No)
	• **TFM - Billable Charge Post-Processing** - Used to attach an algorithm which must be triggered for undertaking some post-processing activities on the billable charges which are generated through the transaction aggregation process. This algorithm is invoked when you execute the **C1-TXNSQ** and **C1-TXNCU** batches. **Note:** The **C1_BCHG_POPC** algorithm type is shipped with the product. For more information, see the algorithm type description. • **TFM - Cancellation Pre-Processing** - Used to attach an algorithm which must be triggered for undertaking some pre-processing activities while canceling the transactions. This algorithm is invoked when you execute the **C1-TXCNC** batch. **Note:** The **C1_CNCL_PRPC** algorithm type is shipped with the product. For more information, see the algorithm type description.	
	• **TFM - Currency Conversion** - Used to attach a date or date and time based currency conversion algorithm that must be triggered while aggregating transactions. **Note:** The **C1_CURALGTFM** and **C1_EXCRTTFM** algorithm types are shipped with the product. For more information, see C1_CURALGTFM and C1_EXCRTTFM. • **TFM - Disaggregation Pre-Processing** - Used to attach an algorithm which must be triggered for undertaking some pre-processing activities while disaggregating the transactions. This algorithm is invoked when you execute the **C1-PDTXN** batch. **Note:** The **C1_DSAG_PRPC** algorithm type is shipped with the product. For more information, see the algorithm type description. • **TFM - Price Item Derivation Post-Processing** - Used to attach an algorithm which must be triggered for undertaking some post-processing activities on the transaction legs. This algorithm is invoked when you execute the **C1-TXNIP** batch. **Note:** The **C1_PRDR_POPC** and **C1-VALECRTRN** algorithm types are shipped with the product. For more information, see the algorithm type description.	

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Field Name	Field Description	Mandatory (Yes or No)
	• **TFM - Rate Post-Processing** - Used to attach an algorithm which must be triggered for undertaking some post-processing activities while determining rate for transaction legs. This algorithm is invoked when you execute the **C1-TXNEX** and **C1-TXNSQ** batches. **Note:** The **C1-ASOEXPOS** and **C1_RTCL_POPC** algorithm types are shipped with the product. For more information, see the algorithm type description. • **TFM - Rate Pre-Processing** - Used to attach an algorithm which must be triggered for undertaking some pre-processing activities while determining rate for transaction legs. This algorithm is invoked when you execute the **C1-TXNEX** and **C1-TXNSQ** batches. **Note:** The **C1-RETFLAT** and **C1_RTCL_PRPC** algorithm types are shipped with the product. For more information, see the algorithm type description.	
	• **TFM - Rollback Pre-Processing** - Used to attach an algorithm which must be triggered for undertaking some pre-processing activities while rolling back the transactions. This algorithm is invoked when you execute the **C1-TXNRB** batch. **Note:** The **C1_ROBK_PRPC** algorithm type is shipped with the product. For more information, see the algorithm type description. • **TFM - SSL Accumulation Post-Processing** - Used to attach an algorithm which must be triggered for undertaking some post-processing activities on the specific stop-loss accumulation amount. This algorithm is invoked when you execute the **C1-ACSSL** batch. **Note:** No algorithm types for this algorithm entity are shipped with the product. The implementation team can create custom algorithm type for this algorithm entity based on the customer requirements. • **TFM - Verify Pricing Post-Processing** - Used to attach an algorithm which must be triggered for undertaking some post-processing activities on a summary record in the **CI_TXN_DTL_PRITM_SUMMARY** table. This algorithm is invoked when you execute the **C1-TXNVP** batch.	

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The **C1-VRPR_POPC** algorithm type is shipped with the product. For more information, see the algorithm type description.	
Sequence Number	Used to specify the order in which the algorithms with the same entity should be executed.	Yes (Conditional) **Note:** This field is required when you are associating an algorithm with the division.
Algorithm	Used to specify the algorithm code. **Note:** The **Search** (🔍) icon appears corresponding to the **Algorithm** field. On clicking the **Search** icon, the **Algorithm Search** window appears.	Yes (Conditional) **Note:** This field is required when you are associating an algorithm with the division.
Description	Displays the description of the algorithm. **Note:** The description appears automatically when you specify the algorithm code in the **Algorithm** field.	Not applicable

3. Enter the required details in the **Algorithms** tab.
4. If you want to associate more than one algorithm with the division, click the **Add** (+) icon and then repeat *s*tep 3.

Note: However, if you want to remove an algorithm from the division, click the **Delete** (🗑) icon corresponding to the algorithm.

5. Click the **Save** button in the **Page Title** area.
   The algorithm is associated with the division.

Related Topics

For more information on...	See...
How to search for a division	Searching for a Division on page 937
Algorithms tab	Division - Algorithms on page 933
Division screen	Division on page 928
How to define a division	Defining a Division on page 937

Defining a Characteristic for a Division

Prerequisites

To define a characteristic for a division, you should have:

- Characteristic types defined in the application (where the characteristic entity is set to Division)

Procedure

To define a characteristic for a division:

1. Search for the division for which you want to define a characteristic.
2. Click the **Characteristics** tab in the **Division** screen.

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The **Characteristics** tab appears. It contains the following field:

Field Name	Field Description
Division	Indicates the division.
	Note: The **Search** (🔍) icon appears corresponding to the **Division** field. On clicking the **Search** icon, the **Division Search** window appears where you can search for a division.

In addition, it contains the following fields in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Effective Date	Used to specify the date from when the characteristic is effective for the division.	Yes (Conditional)
		Note: This field is required when you are defining a characteristic for the division.
Characteristic Type	Used to indicate the characteristic type.	Yes (Conditional)
	Note: The list includes only those characteristic types where the characteristic entity is set to Division.	**Note:** This field is required when you are defining a characteristic for the division.
Characteristic Value	Used to specify the value for the characteristic type.	Yes (Conditional)
	Note: The **Search** (🔍) icon appears corresponding to the **Characteristic Value** field. On clicking the **Search** icon, the **Characteristic Value Search** window appears. On specifying the value for a predefined characteristic type, the description of the characteristic value appears corresponding to the **Characteristic Value** field.	**Note:** This field is required when you are defining a characteristic for the division.

3. Enter the required details in the **Characteristics** tab.
4. If you want to define more than one characteristic for the division, click the **Add** (+) icon and then repeat step *3*.

Note: However, if you want to remove a characteristic from the division, click the **Delete** (🗑) icon corresponding to the characteristic.

5. Click the **Save** button in the **Page Title** area.
   The characteristic is defined for the division.

Related Topics

For more information on...	See...
How to search for a division	Searching for a Division on page 937
Characteristics tab	Division - Characteristics on page 934
Division screen	Division on page 928
How to define a division	Defining a Division on page 937

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Associating a Bill Message with a Division

Prerequisites

To associate a bill message with a division, you should have:

- Bill messages defined in the application

Procedure

To associate a bill message with a division:

1. Search for the division to which you want to associate a bill message.
2. Click the **Bill Messages** tab in the **Division** screen.

   The **Bill Messages** tab appears. It contains the following field:

Field Name	Field Description
Division	Indicates the division.
	Note: The **Search** (🔍) icon appears corresponding to the **Division** field. On clicking the **Search** icon, the **Division Search** window appears where you can search for a division.

   In addition, it contains the following fields in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Start Date	Used to specify the date from when you want the bill message to appear on the bill for the accounts in the division.	Yes (Conditional) **Note:** This field is required when you are associating a bill message with the division.
End Date	Used to specify the date till when you want the bill message to appear on the bill for the accounts in the division.	No
Bill Message	Used to specify the bill message which is valid for the accounts in the division. **Note:** The **Search** (🔍) icon appears corresponding to this field. On clicking the **Search** icon, the **Bill Message Search** window appears. On specifying a bill message, the description of the bill message appears in the **Description** field.	Yes (Conditional) **Note:** This field is required when you are associating a bill message with the division.
Description	Displays the description of the bill message.	Not applicable

3. Enter the required details in the **Bill Messages** tab.
4. If you want to associate more than one bill message with the division, click the **Add** (+) icon and then repeat *s*tep 3.

   Note: However, if you want to remove a bill message from the division, click the **Delete** (🗑) icon corresponding to the bill message.

5. Click the **Save** button in the **Page Title** area.
   The bill message is associated with the division.

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Related Topics

For more information on...	See...
How to search for a division	Searching for a Division on page 937
Bill Messages tab	Division - Bill Messages on page 934
Division screen	Division on page 928
How to define a division	Defining a Division on page 937

Associating a Party Characteristic Type with a Division

Prerequisites

To associate a party char type with a division, you should have:

- Characteristic types defined in the application (where the characteristic entity is set to Division)

Procedure

To associate a party char type with a division:

1. Search for the division to which you want to associate a party char type.
2. Click the **Party Char Types** tab in the **Division** screen.

   The **Party Char Types** tab appears. It contains the following field:

Field Name	Field Description
Division	Indicates the division.
	Note: The **Search** (🔍) icon appears corresponding to the **Division** field. On clicking the **Search** icon, the **Division Search** window appears where you can search for a division.

   In addition, it contains the following fields in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Characteristic Entity	Used to indicate whether the characteristic type is valid for a person or an account in the division.	Yes (Conditional)
		Note: This field is required when you are associating a party char type with the division.
Characteristic Type	Used to indicate the characteristic type.	Yes (Conditional)
	Note: The list includes only those characteristic types where the characteristic entity is set to Division.	**Note:** This field is required when you are associating a party char type with the division.

3. Enter the required details in the **Party Char Types** tab.
4. If you want to associate more than one party char type with the division, click the **Add** (+) icon and then *r*epeat step 3.

Note: However, if you want to remove a party char type from the division, click the **Delete** (🗑) icon corresponding to the characteristic type.

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5. Click the **Save** button in the **Page Title** area.
   The party char type is associated with the division.

Related Topics

For more information on...	See...
How to search for a division	Searching for a Division on page 937
Party Char Types tab	Division - Party Char Types on page 935
Division screen	Division on page 928
How to define a division	Defining a Division on page 937

Associating a Bill Cycle with a Division

Prerequisites

To associate a bill cycle with a division, you should have:

- Bill cycles defined in the application

Procedure

To associate a bill cycle with a division:

1. Search for the division to which you want to associate a bill cycle.
2. Click the **Bill Cycles** tab in the **Division** screen.

   The **Bill Cycles** tab appears. It contains the following field:

Field Name	Field Description
Division	Indicates the division.
	Note: The **Search** (🔍) icon appears corresponding to the **Division** field. On clicking the **Search** icon, the **Division Search** window appears where you can search for a division.

   In addition, it contains the following field in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Bill Cycle	Used to specify the bill cycle that is valid for the accounts associated with the division.	Yes (Conditional)
		Note: This field is required when you are associating a bill cycle with the division.

3. Select the bill cycle from the list.
4. If you want to associate more than one bill cycle with the division, click the **Add** (+) icon and then repeat step *3*.

   Note: However, if you want to remove a bill cycle from the division, click the **Delete** (🗑) icon corresponding to the bill cycle.

5. Click the **Save** button in the **Page Title** area.
   The bill cycle is associated with the division.

Related Topics

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For more information on...	See...
How to search for a division	Searching for a Division on page 937
Bill Cycles tab	Division - Bill Cycles on page 935
Division screen	Division on page 928
How to define a division	Defining a Division on page 937

Associating an Account Identifier Type with a Division

Prerequisites

To associate an account identifier type with a division, you should have:

- Account identifier types defined in the application

Procedure

To associate an account identifier type with a division:

1. Search for the division to which you want to associate an account identifier type.
2. Click the **Account Identifier Types** tab in the **Division** screen.

   The **Account Identifier Types** tab appears. It contains the following field:

Field Name	Field Description
Division	Indicates the division.
	Note: The **Search** (🔍) icon appears corresponding to the **Division** field. On clicking the **Search** icon, the **Division Search** window appears where you can search for a division.

   In addition, it contains the following field in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Account Identifier Type	Used to specify the account identifier type valid for the accounts associated with the division.	Yes (Conditional)
		Note: This field is required when you are associating an account identifier type with the division.

3. Select the account identifier type from the list.
4. If you want to associate more than one account identifier type with the division, click the **Add** (+) icon and *t*hen repeat step 3.

   Note: However, if you want to remove an account identifier type from the division, click the **Delete** (🗑) icon corresponding to the account identifier type.

5. Click the **Save** button in the **Page Title** area.
   The account identifier type is associated with the division.

Related Topics

For more information on...	See...
How to search for a division	Searching for a Division on page 937

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For more information on...	See...
Account Identifier Types tab	Division - Account Identifier Types on page 936
Division screen	Division on page 928
How to define a division	Defining a Division on page 937

Defining a Division-Specific Characteristic for a Price Item

Prerequisites

To define a division-specific characteristics for a price item, you should have:

- Characteristic types defined in the application (where the characteristic entity is set to Division/Price Item Combination)
- Price item associated with the division to which the user belongs

Procedure

To define a division-specific characteristic for a price item:

1. Search for the division for which you want to define a price item characteristic.
2. Click the **Price Item Characteristics** tab in the **Division** screen.

   The **Price Item Characteristics** tab appears. It contains the following field:

Field Name	Field Description
Division	Indicates the division.
	Note: The **Search** (🔍) icon appears corresponding to the **Division** field. On clicking the **Search** icon, the **Division Search** window appears where you can search for a division.

   In addition, it contains the following fields in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Price Item	Indicates the price item count associated with the selected division.	No
Price Item	Indicates the price item code associated with the division to which the user belongs.	Not applicable
Effective Date	Used to specify the date from when the price item characteristic is effective for the division.	Yes (Conditional) **Note:** This field is required when you are defining a division-specific characteristic for the price item.
Characteristic Type	Used to indicate the characteristic type. **Note:** The list includes only those characteristic types where the characteristic entity is set to Division/Price Item Combination.	Yes (Conditional) **Note:** This field is required when you are defining a division-specific characteristic for the price item.

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Field Name	Field Description	Mandatory (Yes or No)
Characteristic Value	Used to specify the value for the characteristic type.	Yes (Conditional)
	Note: If you select a predefined characteristic type, the **Search** (🔍) icon appears corresponding to the **Characteristic Value** field. On clicking the **Search** icon, the **Characteristic Value Search** window appears. On specifying the value for a predefined characteristic type, the description of the characteristic value appears corresponding to the **Characteristic Value** field.	**Note:** This field is required when you are defining a division-specific characteristic for the price item.

3. If the division has multiple price items associated with it, navigate to define a characteristic for the required price item.

> **Note:** You can use the **Previous** (⇦) and **Next** (⇨) buttons to navigate through the price items while defining their characteristics.

4. Enter the required details in the **Price Item Characteristics** tab.
5. If you want to define more than one division-specific characteristic for the price item, click the **Add** (+) icon *a*nd then repeat step 4.

> **Note:** However, if you want to remove a division-specific characteristic from the price item, click the **Delete** (🗑) icon corresponding to the characteristic.

6. Click the **Save** button in the **Page Title** area.
   The division-specific characteristic is defined for the price item.

Related Topics

For more information on...	See...
How to search for a division	Searching for a Division on page 937
Price Item Characteristics tab	Division - Price Item Characteristics on page 936
Division screen	Division on page 928
How to define a division	Defining a Division on page 937

Associating a To Do Type and To Do Role with a Division

Prerequisites

To associate a To Do type and To Do role with a division, you should have:

- To Do types and to do roles defined in the application
- To Do roles associated to the respective to do types

Procedure

To associate a To Do type and To Do role with a division:

1. Search for the division to which you want to associate a To Do type and To Do role.
2. Click the **Main** tab in the **Divisions** screen.

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The **Main** tab appears.

3. The **To Do** section contains the following fields in a grid:

Field Name	Field Description	Mandatory (Yes or No)
To Do Type	Used to indicate the To Do type for which you want to define division-specific To Do role.	Yes (Conditional)
	Note: The **Search** (🔍) icon appears corresponding to the **To Do Type** field. On clicking the **Search** icon, the **To Do Type Search** window appears.	**Note:** This field is required when you are defining a To Do type for the division
To Do Role	Used to indicate the To Do role whose users must receive the To Do entries of the specified To Do type for the accounts which belong to the division.	Yes (Conditional)
	Note: The **Search** (🔍) icon appears corresponding to the **To Do Role** field. On clicking the **Search** icon, the **Role for To Do Type** window appears.	**Note:** This field is required when you are defining a division-specific To Do role for a To Do type

4. If you want to associate more than one To Do type and To Do role with the division, click the **Add** (+) icon and then *r*epeat step 3.

Note: However, if you want to remove a To Do type and To Do role from the division, click the **Delete** (🗑) icon corresponding to the To Do type.

5. Click the **Save** button in the **Page Title** area.
The To Do type and To Do role is associated with the division.

Related Topics

For more information on...	See...
How to search for a division	Searching for a Division on page 937
Main tab	Division - Main on page 929
Division screen	Division on page 928
How to define a division	Defining a Division on page 937

Division Group

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

The **Division Group** screen enables you to define a division group where you can include one or more divisions that are already defined in the system. It also enables you edit and copy a division group. It contains the following zones:

- Division Group List on page 963
- Division Group on page 963

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Note:

You can set the status of a division group to **Active** or **Inactive**. The system will then allow you to use an active division group while executing batches in the system.

At present, the division group is supported in the following batches — **C1-TXNIP**, **C1-TXNPS**, **C1-TXNVP**, **C1-TXNEX**, **C1-TXNSQ**, **C1-TXNCM**, **C1-TXNCU**, **BILLOPEN**, **BSGENREG**, **POSTPROC**, **C1-DISTG**, **C1-BSEGD**, **C1-PNBD**, **C1-IDENT**, **C1-PDTXN**, **C1-DRSUA**, **APAYCRET**, **ACTVTAPY**, **APAYACH**, **APAYDSFR**, **BALAPY**, **APYSDSFR**, **AREFRA**, **APAYRA**, **C1-GLASN**, **C1-GLS**, and **C1-GLDL**. Note that the division group functionality in all the supported batches is tested and certified for both the financial services and health insurance domains.

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

Division Group List

The **Division Group List** zone lists the division groups that are already defined in the system. It contains the following columns:

Column Name	Column Description
Division Group	Displays the division group.
Description	Displays the description of the division group.
Edit	On clicking the **Edit** (✎) icon, the **Division Group** screen appears where you can edit the details of the division group.
Duplicate	On clicking the **Duplicate** (⧉) icon, the **Division Group** screen appears where you can define a new division group using an existing division group.

You can filter the list using various search criteria (such as, **Division Group**, **Description**, **Division**, and **Status**) available in the **Filter** area. By default, the **Filter** area is hidden. You can view the **Filter** area by clicking the **Filters** (▽) icon in the upper right corner of this zone.

On clicking the **Broadcast** (📡) icon corresponding to a division group, the **Division Group** zone appears with the details of the respective division group.

Related Topics

For more information on...	See...
How to edit a division group	Editing a Division Group on page 966
How to copy a division group	Copying a Division Group on page 967
How to view the details of a division group	Viewing the Division Group Details on page 968

Division Group

The **Division Group** zone displays the details of the division group. It contains the following sections:

- **Main** - Displays the basic information about the division group. It contains the following fields:

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Field Name	Field Description
Division Group	Displays the division group.
Status	Indicates the status of the division group. The valid values are: • Active • Inactive
Description	Displays the description of the division group.

- **Divisions** - Lists the divisions that are included in the division group. It contains the following column:

Column Name	Column Description
Division	Displays the description of the division. **Note:** It has a link. On clicking the link, the **Division** screen appears where you can view the details of the respective division.

- **Record Actions** - Enables you to perform various actions on the division group. It contains the following buttons:

Button Name	Button Description
Edit	Used to edit the details of the division group.
Duplicate	Used to create a new division group using an existing division group.

- **Record Information** - This section contains the following field:

Field Name	Field Description
Business Object	Indicates the business object using which the division group is created. In addition, a context menu ( ) icon appears corresponding to this field which helps in navigating to other screens in the application. **Note:** It has a link. On clicking the link, the **Business Object** screen appears where you can view the details of the respective business object.

By default, the **Division Group** zone does not appear in the **Division Group** screen. It appears when you click the **Broadcast** ( ) icon corresponding to the division group in the **Division Group List** zone.

Related Topics

For more information on...	See...
How to edit a division group	Editing a Division Group on page 966
How to copy a division group	Copying a Division Group on page 967
How to view the details of a division group	Viewing the Division Group Details on page 968
Division Group screen	Division Group on page 962
Division Group List zone	Division Group List on page 963

Defining a Division Group

Procedure

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To define a division group:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **D** and then click **Division Group**.
   A sub-menu appears.
3. Click the **Add** option from the **Division Group** sub-menu.

   The **Division Group** screen appears. It contains the following sections:

   - **Main** - Used to specify the basic details for the division group.
   - **Divisions** - Used to specify the divisions that you want to add in the division group.

   The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Division Group	Used to specify the division group.	Yes
Status	Used to indicate the status of the division group. The valid values are: • Active • Inactive **Note:** You can only use an active division group while executing batches in the system.	Yes
Description	Used to specify the description for the division group.	Yes

   Tip: Alternatively, you can access the **Division Group** screen by clicking the **Add** button in the **Page Title** area of the **Division Group** screen.
4. Enter the required details in the **Main** section.
5. Add divisions that you want to group based on various factors (such as business cut-off time, source data file availability and volume, etc.) in the **Divisions** section.
6. Click **Save**.
   The division group is defined.

Related Topics

For more information on...	See...
Division Group screen	Division Group on page 962
How to add a division in a division group	Adding a Division in a Division Group on page 965

Adding a Division in a Division Group

Prerequisites

To add a division in a division group, you should have:

- Divisions defined in the application.

Procedure

To add a division in a division group:

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1. Ensure that the **Divisions** section is expanded when you are defining, editing, or copying a division group.

   The **Divisions** section contains the following field:

Field Name	Field Description	Mandatory (Yes or No)
Division	Used to indicate the division that you want to add in the division group. **Note:** The list includes only those divisions which are already defined in the system.	Yes

2. Enter the required details in the **Divisions** section.

Note: You must specify at least one division while defining, editing, or copying a division group.

3. If you want to add more than one division in the division group, click the **Add** (+) icon and then *r*epeat step *2*.

Note: However, if you want to remove a division from the division group, click the **Delete** (🗑) icon corresponding to the division.

Related Topics

For more information on...	See...
How to define a division group	Defining a Division Group on page 964
How to edit a division group	Editing a Division Group on page 966
How to copy a division group	Copying a Division Group on page 967

Editing a Division Group

Procedure

To edit a division group:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **D** and then click **Division Group**.
   A sub-menu appears.
3. Click the **Search** option from the **Division Group** sub-menu.
   The **Division Group** screen appears.
4. In the **Division Group List** zone, click the **Edit** (✎) icon in the **Edit** column corresponding to the division group whose details you want to edit.

   The **Division Group** screen appears. It contains the following sections:

   - **Main** - Used to specify the basic details for the division group.
   - **Divisions** - Used to specify the divisions that you want to add in the division group.

   The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Division Group	Displays the division group.	Not applicable
Status	Used to indicate the status of the division group. The valid values are:	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	• Active • Inactive **Note:** You can only use an active division group while executing batches in the system.	
Description	Used to specify the description for the division group.	Yes

Tip: Alternatively, you can click the **Edit** button in the **Division Group** zone to edit the details of the division group.

5. Modify the required details in the **Main** section.
6. Add or remove the division from the division group, if required.
7. Click **Save**.
   The changes made to the division group are saved.

Related Topics

For more information on...	See...
Division Group screen	Division Group on page 962
Division Group List zone	Division Group List on page 963
Division Group zone	Division Group on page 963
How to add a division in a division group	Adding a Division in a Division Group on page 965

Copying a Division Group

Instead of creating a division group from scratch, you can create a new division group using an existing division group. This is possible through copying a division group. On copying a division group, the details including the divisions are copied to the new division group. You can then edit the details, if required.

Prerequisites

To copy a division group, you should have:

- Division group (whose copy you want to create) defined in the application

Procedure

To copy a division group:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **D** and then click **Division Group**.
   A sub-menu appears.
3. Click the **Search** option from the **Division Group** sub-menu.
   The **Division Group** screen appears.
4. In the **Division Group List** zone, click the **Duplicate** (⧉) icon in the **Duplicate** column *c*orresponding to the division group whose copy you want to create.

   The **Division Group** screen appears. It contains the following sections:

   - **Main** - Used to specify the basic details for the division group.

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- **Divisions** - Used to specify the divisions that you want to add in the division group.

The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Division Group	Used to specify the division group.	Yes
Status	Used to indicate the status of the division group. The valid values are: • Active • Inactive **Note:** You can only use an active division group while executing batches in the system.	Yes
Description	Used to specify the description for the division group.	Yes

Tip: Alternatively, you can click the **Duplicate** button in the **Division Group** zone to create a copy of the division group.

5. Enter the required details in the **Main** section.
6. Add or remove the division from the division group, if required.
7. Click **Save**.
   The new division group is defined.

Related Topics

For more information on...	See...
Division Group screen	Division Group on page 962
Division Group List zone	Division Group List on page 963
Division Group zone	Division Group on page 963
How to add a division in a division group	Adding a Division in a Division Group on page 965

Viewing the Division Group Details

Procedure

To view the details of a division group:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **D** and then click **Division Group**.
   A sub-menu appears.
3. Click the **Search** option from the **Division Group** sub-menu.
   The **Division Group** screen appears.
4. In the **Division Group List** zone, click the **Broadcast** (📡) icon corresponding to the division group whose details you want to view.
   The **Division Group** zone appears.
5. View the details of the division group in the **Division Group** zone.

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Related Topics

For more information on...	See...
Division Group screen	Division Group on page 962
Division Group List zone	Division Group List on page 963
Division Group zone	Division Group on page 963

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Chapter 13

Approval Workflow

Topics:

- Most Commonly Used Terms
- Approval Workflow Process
- Prerequisites
- Approval Transaction
- Comparison: New versus Existing
- Approve Price Assignment
- Modify Price Assignment
- Resolve Price Assignment
- Approval Workflow Group (Used for Searching)
- Approval Workflow Group (Used for Viewing)
- Approval Workflow Chain (Used for Searching)
- Approval Workflow Chain (Used for Viewing)
- Approval Workflow Criterion Type (Used for Searching)
- Approval Workflow Criterion Type (Used for Viewing)
- Approval Workflow Group Chain Linkage (Used for Searching)
- Approval Workflow Group Chain Linkage (Used for Viewing)
- Approval Workflow Setting (Used for Searching)
- Approval Workflow Setting (Used for Viewing)
- Approval Workflow Reason
- Approval Workflow Reason (Used for Viewing)

Oracle Revenue Management and Billing may optionally be configured to use the approval workflow process whenever any addition, modification, or deletion is done manually by a user. The approval workflow process routes any changes made to the business objects (such as person, account, contract, division, and so on) to a group of people for approval. The approval workflow process allows you to manage and track all tasks involved in the approval process.

Approval workflow allows you to define the rules for requiring an approval step before the data changes are committed to the database. Once you establish the approval workflow rules, the application manages the business process flow for having data changes approved before they are reflected in the database.

The system provides you with a flexible set of options used to determine when approvals are required, and how the approval process is to be managed including:

- Turning approval on or off for individual business objects within the application
- Grouping business objects so that approval is required for the group rather than the individual business objects within the group
- Who should approve
- How many levels of approvals are required
- Different approval workflow chains based on different criteria

Once you have turned approval workflow on for an object, or a group of objects, the system will use the approval workflow configuration to manage the entire approval process including:

- Determining whether approval is required based on data changes submitted by a user
- Routing approval workflow requests to one or more qualified approvers
- Managing rejected data changes and sending these back to the submitter for resolution
- Committing the changes once all required approvals are received

Most Commonly Used Terms

Before you understand the approval workflow process, you must familiarize yourself with the following terms:

Term	Description
Submitter	A person who adds, modifies or deletes a business object, such as person, account, contract, and division is called a submitter.
Approver	A person who approves any changes made to a business object is called an approver.
Approval Workflow Group	A group of one or more business objects for which approval is required, under some or all conditions, when data changes are made.
Approval Workflow Chain	The approval workflow chain indicates how many levels of approvals are required to approve the changes made by the submitter.

Approval Workflow Process

When a submitter adds, edits or deletes a business object (for example, an account) that belongs to an approval workflow group, the system checks whether approval workflow is activated for the approval workflow group. If the approval workflow is activated for the group, the system creates an approval workflow request. Every approval workflow request is uniquely identified in the system through the Approval Transaction ID.

The system identifies the approval workflow chain that must be used for approval depending on the pre-configured conditions or criteria. Based on the number of levels defined in the approval workflow chain, the request is sent to the approver at each level in the chain or hierarchy for approval. When the approver at the first level approves the request, a notification is sent to the approver at the second level for approval. This process continues till the approval is received from all levels in the hierarchy. Once the approvers at all levels approve the request, the changes are committed to the database.

However, if an approver at any level in the hierarchy rejects the request, a notification is sent to the submitter who has made the changes. The submitter then makes the required corrections based on the approver's comments and resubmits the changes for approval. In this case, the approval process starts once again from the beginning and not from the level at which the request was rejected.

The submitter also has the facility to modify the request before the approver at the first level in the hierarchy approves or rejects the request. Once the changes are made, the submitter submits the request for approval. The submitter also has the facility to cancel the request.

The following figure indicates the flow of the approval workflow process:

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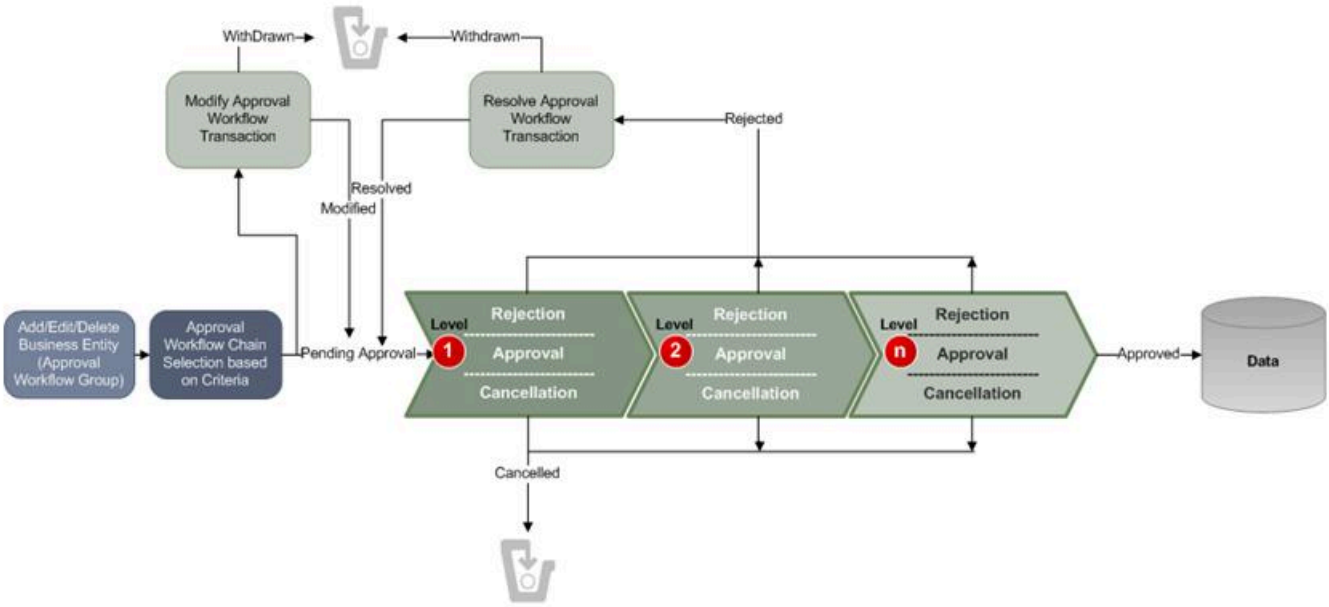

To implement the approval workflow process, you need to define the following:

- Approval Workflow Group (Used for Searching) on page 1023
- Approval Workflow Chain (Used for Searching) on page 1039
- Approval Workflow Criterion Type (Used for Searching) on page 1046
- Approval Workflow Group Chain Linkage (Used for Searching) on page 1052
- Approval Workflow Reason on page 1069
- Approval Workflow Setting (Used for Searching) on page 1062

For price list, price item and price assignment, the approval workflow configuration is shipped with ORMB. The following groups are available in the system:

- **C1PRODUCT** - Contains the C1_PRICEITEM_BO business object
- **C1PRICELST** - Contains the C1_F_ADDPLBO business object
- **C1PRICEASG** - Contains the C1_PRICECOMP and C1_PRICEASGN_BO business objects

After creating the approval workflow chains, you need to link these groups to the corresponding approval workflow chains. To setup the approval workflow process for price assignment, you need to do the following:

For Price Item	1. If a **Determine BO** algorithm is not specified for the **C1_PRICEITEM** maintenance object, create a **Determine BO** algorithm using the **F1-MOBO** algorithm type and specify **C1_PRICEITEM_BO** as the business object on this algorithm. 2. Attach this algorithm on the **Determine BO** algorithm spot of the **C1_PRICEITEM** MO. 3. Link the **C1PRODUCT** group to the appropriate approval workflow chain. 4. Activate the approval workflow for the **C1PRODUCT** group by setting the **Active** flag corresponding to the group in the **Approval Workflow Settings** screen to **Y**.

For Price List	1. If a **Determine BO** algorithm is not specified for the **C1_PRICELIST** maintenance object, create a **Determine BO** algorithm using the **F1-MOBO** algorithm type and specify **C1_F_ADDPLBO** as the business object on this algorithm. 2. Attach this algorithm on the **Determine BO** algorithm spot of the **C1_PRICELIST** MO. 3. Link the **C1PRICELST** group to the appropriate approval workflow chain.

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	4. Activate the approval workflow for the **C1PRICELST** group by setting the **Active** flag corresponding to the group in the **Approval Workflow Settings** screen to **Y**.
For Price Assignments	**1.** If a **Determine BO** algorithm is not specified for the **C1_PRICECOMP** maintenance object, create a **Determine BO** algorithm using the **F1-MOBO** algorithm type and specify **C1_PRICECOMP** as the business object on this algorithm. **2.** Attach this algorithm on the **Determine BO** algorithm spot of the **C1_PRICECOMP** MO. **3.** If a **Determine BO** algorithm is not specified for the **C1_PRICEASGN** maintenance object, create a **Determine BO** algorithm using the **F1-MOBO** algorithm type and specify **C1_PRICEASGN_BO** as the business object on this algorithm. **4.** Attach this algorithm on the **Determine BO** algorithm spot of the **C1_PRICEASGN** MO. **5.** Link the **C1PRICEASG** group to the appropriate approval workflow chain. **6.** Activate the approval workflow for the **C1PRICEASG** group by setting the **Active** flag corresponding to the group in the **Approval Workflow Settings** screen to **Y**.

Similarly, for invoicing group, the approval workflow configuration is shipped with ORMB. The following groups are available in the system:

- **C1IGADD**
- **C1IGUPD**

After creating the approval workflow chains, you need to link these groups to the corresponding approval workflow chains, and activate the approval workflow for these groups by setting the following in the **Approval Workflow Settings** screen:

- Set **Active** flag to **Yes**
- Set **Prevalidation** flag to **Yes**

Note: You must set the **Active** flag to **No** for both the groups in case you do not want to activate the approval workflow for invoicing group. If you set the **Active** flag to **Yes** for either of the groups, approval workflow is triggered when you add and/or edit an invoicing group.

Prerequisites

You need to setup the following prerequisites to implement the approval workflow process:

- **Setup Feature Configuration for Approval Workflow** - If you create new Maintenance Objects (MOs) and want the access control for these MOs in the approval workflow transactions to be based on the access group and division, then you have to create a custom algorithm and attach it to the **Approval Transaction Entity Access Algorithms** option type of the **C1_AXENTITY** feature configuration. Note that you will then have two access algorithms; one default algorithm (that is, **C1-APPTXN**) and another custom algorithm. For more information about the **C1_AXENTITY** feature configuration, see Setting the C1_AXENTITY Feature Configuration on page 4436.
- **Create and Attach Determine BO Algorithm** - To use approval workflow for a business object, check the corresponding maintenance object to see if a **Determine BO** algorithm is already attached to it. If not, create a **Determine BO** algorithm using the **F1-MOBO** algorithm type, and specify the appropriate business object name on the newly created algorithm. Attach this algorithm on the **Determine BO** algorithm spot of the maintenance object.
- **Attach Audit Algorithm to Business Objects** - To use the approval workflow process for a business object, you need to attach the **C1-APPTXNBAS** algorithm on the **Audit** algorithm spot of the business object. Unless you attach the audit algorithm to a business object, the approval workflow process will not be triggered for the respective business object. This step is only required when you are using the base panels. If you have created custom UI maps to enter or modify data for a specific business object, this step is not needed.
- **Attach Validation Algorithms to Business Objects** - The following algorithms are shipped with ORMB:

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Business Object	Basic Validation Algorithm	Pending Transaction Validation Algorithm
C1-AppBOChain	C1-GRPCHNALG	C1-APPGRPCHL
C1-AppGrp	C1-GRPALG	C1-APPGROUPV
C1-ApprovalChainEligible	C1-ADMALG	C1-APGBYPORT
C1-ApprovalTransactionChain	C1-APCHALGO	C1-APCHNPEND

The basic validation algorithms are attached to the respective business objects, and then shipped with ORMB. However, the pending transaction validation algorithms are not attached to the respective business objects. If you want to restrict the users from either editing or deleting the approval workflow group, approval workflow settings, approval workflow chain, or approval workflow group chain linkage when the respective approval workflow requests are in the **Pending**, **Work-in-Progress**, or **Rejected** state, then you must attach the pending transaction validation algorithm on the **Validation** algorithm spot of the respective business object.

- **Set Colors for Highlighting during Comparison** - While approving, rejecting, or cancelling approval workflow requests where the submitter action is Update (UPD), you will be able to compare the existing and new data. By default, any modifications are highlighted in the Yellow (9933FF) color and new additions are highlighted in the Purple (FFFF66) color. You can easily change these default colors. For more information on how to set the colors used for highlighting, see .Setting the C1_AXENTITY Feature Configuration on page 4436.
- **Create To Do Types** - You need to create the To Do types that you want to use in the approval workflow process. Once the To Do type is created, you need to link it to the required To Do roles so that users belonging to the To Do role can view and work on the To Do type.
- **Create To Do Roles** - You need to create the To Do roles that you want to use in the approval workflow process. Once the To Do role is created, you need to add the users whom you want to assign this role.

Note: User who is withdrawing the approval workflow request must be assigned to the To Do role to which the approver at the first level in the hierarchy is assigned. Otherwise, the user will not be able to withdraw the approval workflow request.

- **Create Input UI Map for an Approval Workflow Group** - The system provides you with the ability to automatically generate an Input UI map, and associate it with the approval workflow group. Alternatively, you can create an Input UI map manually, and attach it to the approval workflow group. For more information on how to create an Input UI map manually, see Creating Input UI Map for an Approval Workflow Group on page 4415.
- **Create Display UI Map for an Approval Workflow Group** - The system provides you with the ability to automatically generate a Display UI map, and associate it with the approval workflow group. Alternatively, you can create a Display UI map manually, and attach it to the approval workflow group. For more information on how to create a Display UI map manually, see Creating Display UI Map for an Approval Workflow Group on page 4414.

Approval Transaction

If an approver at any level in the hierarchy rejects a request, a notification is sent to the submitters having the To Do role to resolve. The submitter then makes the required corrections based on the approver's comments, and resubmits the changes for approval. In this case, the approval process starts once again from the beginning, and not from the level at which the request was rejected.

The **Approval Transaction** screen allows you to resolve or withdraw a request. It consists of the following zones:

- Search Approval Transaction on page 976
- Approval Transaction Log on page 979

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Search Approval Transaction

The **Search Approval Transaction** zone allows you to search for an approval transaction using various search criteria. It contains the following two sections:

- **Search Criteria** - The **Search Criteria** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Search By	Used to indicate whether you want to search for an approval transaction using the task or approval transaction details. The valid values are: • Task Details • Approval Transaction Details **Note:** By default, the **Task Details** option is selected.	Yes
Status	Used to search approval transactions with a particular status. The valid values are: • Approved • Cancelled • Rejected • Inprocess • Pending • Deleted **Note:** This field appears when you select the **Approval Transaction Details** option from the **Search By** list.	No
Task	Used to search approval transactions with a particular task. The valid values are: • Approve • Modify • Resolve **Note:** This field appears when you select the **Task Details** option from the **Search By** list.	Yes (Conditional) **Note:** This field is required when you want to search approval transactions using the task details.
Approval Workflow Group	Used to search approval transactions created for the business objects that belong to a particular approval workflow group.	No
Division	Used to search approval transactions which belong to a particular division. **Note:** You can only view those divisions to which you have access in the **Division** list.	No
Reference ID	Used to search approval transactions created for the business object with a particular reference ID.	No
Approval Transaction ID	Used to search for a particular approval transaction.	No

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Field Name	Field Description	Mandatory (Yes or No)
Created From	Used to search approval transactions which are created from a particular date onwards.	No
Created Until	Used to search approval transactions which are created till a particular date.	No
Action	Used to search approval transactions which are created while adding, updating, or deleting a business object.	No
Submitter ID	Used to search approval transactions which are created by a particular submitter. **Note:** This field appears either when you select the **Task Details** from the **Search By** list and **Approve** option from the **Task** list or when you select the **Approval Transaction Details** from the **Search By** list and **Processing**, **Pending**, or **Deleted** option from the **Approval Transaction Status** list. The **Search** (🔍) icon appears corresponding to this field. On clicking the **Search** icon, the **Submitter Id for Status** window appears.	No
Approver ID	Used to search approval transactions which are rejected by a particular approver. **Note:** The **Approver ID** is displayed when the approval transaction is searched by **Task Details** and **Task** is **Resolve**. It is also displayed when the approval transaction is searched by **Approval Transaction Details** and Status is **Approved**, **Canceled**, or **Rejected**. The **Search** (🔍) icon appears corresponding to this field. On clicking the **Search** icon, the **Approver ID Search** window appears.	No

Note: You must specify at least one search criterion while searching for an approval transaction. One more search criterion is required when you are searching for an approval transaction using the **Task** field.

- **Search Results** - On clicking the **Search** button, the search results appear based on the specified search criteria. The **Search Results** section contains the following columns:

Column Name	Column Description
Approval Transaction ID	Displays the approval transaction ID.

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Column Name	Column Description
	Note: It has a link. The link appears when you select **Task Details** option from the **Search By** list. If the **Approve** option is selected from the **Task** list then on clicking the link, **Comparison: New versus Existing** window appears with the compared details of the new and existing approval transactions. If the **Modify** option is selected from the **Task** list then on clicking the link, **Modify/Resolve Price List Assignment** window appears to modify or resolve the details of price list assignment. If the **Resolve** option is selected from the **Task** list then on clicking the link, **Modify/ Resolve Price List Assignment** window appears to modify or resolve the details of price list assignment.
Approval Workflow Group	Displays the code of the approval workflow group.
Submitter Name	Displays the name of submitter who submits the approval transaction details list. **Note:** This column appears either when you select the **Approve** or **Modify** option from the **Task** list or when you select the **Processing**, **Pending**, or **Deleted** option from the **Approval Transaction Status** list.
Approver Name	Displays the name of an approver who approves an approval transaction details list. **Note:** This column appears either when you select the **Resolve** option from the **Task** list or when you select the **Approved**, **Canceled**, or **Rejected** option from the **Approval Transaction Status** list.
Submitted On	Displays the date and time on which approval transaction is submitted for approval. **Note:** This column appears either when you select the **Approve** or **Modify** option from the **Task** list or when you select the **Approved**, **Pending**, or **Deleted** option from the **Approval Transaction Details** list.
Action	Indicates the various types of action. The valid values are: • Add • Delete (DEL) • Update (UPD)
Division	Displays the division to which the approval transaction belongs.
Status	Displays the status of approval transaction. The valid values are: • Approved • Cancelled • Rejected • Processing • Pending • Deleted **Note:** This column appears either when you select **Approval Transaction Details** option from the **Search By** list of the search criteria.
To Do Type	Displays the type of **To Do** (notification) received for the approval transaction.
Approval Transaction Information	Displays additional information about the approval transaction.

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Column Name	Column Description
Rejected On	Displays the date and time on which the transaction is rejected. **Note:** This column appears either when you select the **Resolve** option from the **Task** list or when you select the **Rejected**, option from the **Approval Transaction Details** list.
Reject Reason	Displays the reason for which the approval transaction is rejected by the approver. **Note:** This column appears either when you select the **Resolve** option from the **Task** list or when you select the **Rejected** option from the **Approval Transaction Details** list.
Canceled On	Displays the date and time on which the approval transaction is canceled by the user. **Note:** This column appears when you select the **Cancelled** option from the **Approval Transaction Details** list.
Cancel Reason	Displays the reason for which the approval transaction is canceled by the user. **Note:** This column appears either when you select the **Canceled** option from the **Approval Transaction Details** list.
Withdraw	Displays a link to withdraw an approval transaction. **Note:** This column appears either when you select the **Modify** or **Resolve** option from the **Task** list. It has a link and on clicking the link, a message appears to confirm the withdrawal of the respective approval transaction.

On clicking the **Broadcast** (ᯤ) icon corresponding to the approval transaction the **Approval Transaction Log** zone appears with the approval transaction log details.

Related Topics

For more information on...	See...
Approval Transaction Log zone	Approval Transaction Log on page 979
How to search for an approval transaction	Searching for an Approval Transaction on page 980
How to view the log of an approval transaction	Viewing the Log of an Approval Transaction on page 981

Approval Transaction Log

The **Approval Transaction Log** zone displays the complete trail of submitter and approver actions performed on the approval transaction. It contains the following columns:

Column Name	Column Description
Date Time	Displays the date and time when the action was performed on the approval transaction.
User Name	Indicates the user who has performed the action on the approval transaction.
Status	Displays the status of the approval transaction. The valid values are: • Approved

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Column Name	Column Description
	• Cancelled • Rejected • InProcess • Pending • Deleted
View	It has a link. On clicking the **View** link, the **Comparison: New versus Existing** window appears where you can view the existing and new compared transactions".
Status Reason	Displays the status reason of the approval transaction.
Comments	Displays additional information about the approval transaction.

By default, the **Banking Approval Transaction Log** zone does not appear. It appears when you click the **Broadcast** (📡) icon corresponding to the approval transaction in the **Approval Transaction** zone.

You can change the layout of this zone. For more information on how to change the layout, see Changing the Layout on page 4410.

Related Topics

For more information on...	See...
How to view the log of an approval transaction	Viewing the Log of an Approval Transaction on page 981

Searching for an Approval Transaction

Procedure

To search for an approval transaction:

1. Click the **Menu** link in the **Application** toolbar.
   A list appears.
2. From the **Main** menu, select **Approval Workflow** and then click **Approval Transaction**.
   The **Approval Transaction** screen appears.
3. Click the **Search** option from the **Approval Transaction** sub-menu.
   The **Approval Transaction** screen appears.
4. Enter the search criteria in the **Search Approval Transaction** zone depending on whether you want to search for a task or approval transaction details.

   Note: ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.
5. Click **Search**.
   A list of task or approval transactions that meet the search criteria appears in the **Search Results** section.

Related Topics

For more information on...	See...
Approval Transaction screen	Approval Transaction on page 975
Search Approval Transaction zone	Search Approval Transaction on page 976

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Viewing the Log of an Approval Transaction

Procedure

To view the log of an approval transaction:

1. Search for the task or approval transaction details in the **Approval Transaction** screen.
2. In the Search Results section, click the **Broadcast** (⦾) icon corresponding to the approval transaction whose log details you want to view.
   The **Approval Transaction Log** zone appears.
3. View the log details of the approval transactions in the **Approval Transaction Log** zone.

Related Topics

For more information on...	See...
Search Approval Transaction zone	Search Approval Transaction on page 976
Approval Transaction Log zone	Approval Transaction Log on page 979

Comparison: New versus Existing

You have to define the reason codes which are used when the approval workflow request is either rejected or cancelled. The reason code helps to indicate the reason why a particular request was rejected or cancelled.

The **Comparison: New versus Existing** screen allows you to view the changes in the new approval transaction compared to the existing one. It contains the following sections:

- New
- Existing

Through this screen you can do the following:

- Approve an approval transaction
- Reject an Approval Transaction
- Cancel an approval transaction
- Modify an approval transaction
- Withdraw an Approval Transaction
- Resolve an approval transaction

Approving an Approval Transaction

You can view the number of approval transactions which are pending for approval in the **Approval Transaction** screen. The approver can review, and accordingly approve, return to the submitter, revert to the original, or cancel the approval transaction based on the observations.

Note: The system will not allow you to approve, return to the submitter, revert to the original or cancel an approval transaction submitted by you.

Procedure

To approve an approval transaction:

1. Search for approval transactions with task details and status as Approve in the **Approval Transaction** screen.

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2. In the **Search Results** section, click the link in the **Approval Transaction ID** column corresponding *t*o the approval transaction which you want to review.
   The **Comparison: New versus Existing** screen appears.
3. Review the compared existing and new approval transactions.
4. Click **Approve**.
   A message appears with confirmation on transaction approved successfully.

> **Note:** ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.

5. Click **OK**.
   The approval transaction is removed from the search results.

> **Note:**
>
> By default, any modifications will be highlighted in the Yellow (9933FF) color and new additions will be highlighted in the Purple (FFFF66) color. You can easily change these default colors. For more information on how to set the colors used for highlighting, see Setting the C1_AXENTITY Feature Configuration on page 4436.

6. Review the changes and click **Approve** to accept the changes.
   The changes in the approval transaction are approved.

Related Topics

For more information on...	See...
Search Approval Transaction zone	Search Approval Transaction on page 976
Comparison: New versus Existing screen	Comparison: New versus Existing on page 981
How to search for an approval transaction	Searching for an Approval Transaction on page 980

Rejecting an Approval Transaction

Prerequisites

To return an approval transaction to its submitter, you should have:

- Rejection reasons defined in the application

> **Note:**
>
> While returning an approval transaction, you need to specify the reason why you want to return the approval transaction. You can select the appropriate rejection reason when you have defined the reasons for the **Rejected** status of the business object in the **Status Reason** screen.
>
> The system will not allow you to approve, return or revert an approval transaction submitted by you.

Procedure

To reject an approval transaction:

1. Click the **Menu** link in the **Application** toolbar.
   A list appears.
2. In the **Search Results** section, click the link in the **Approval Transaction ID** column corresponding *t*o the approval transaction which you want to review.

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The **Comparison: New versus Existing** screen appears.

3. Review the compared existing and new approval transactions.
4. Click Return to Submitter." With stepresult, "The Rejection/Cancelation Reason window appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Approval Workflow Reason	Used to search a particular approval workflow reason.	Yes
Comments	Used to specify additional information while rejecting the usage record.	Yes

5. Enter the required details.
6. Click **OK**.
   The approval transaction is removed from the search results.

Related Topics

For more information on...	See...
Search Approval Transaction zone	Search Approval Transaction on page 976
Comparison: New versus Existing screen	Comparison: New versus Existing on page 981
How to approve an approval transaction	Approving an Approval Transaction on page 981
How to search for an approval transaction	Searching for an Approval Transaction on page 980

Canceling an Approval Transaction

Prerequisites

To revert an approval transaction to its initial status, you should have:

- Cancelation reasons defined in the application

Note:

While reverting an approval transaction, you need to specify the reason why you want to revert the approval transaction. You can select the appropriate cancelation reason when you have defined the reasons for the **Canceled** status of the business object in the **Status Reason** screen.

The system will not allow you to approve, return or revert an approval transaction submitted by you.

Procedure

To cancel an approval transaction:

1. Search for approval transactions with task details and status as Approve in the **Approval Transaction** screen.
2. In the **Search Results** section, click the link in the **Approval Transaction ID** column corresponding *t*o the approval transaction which you want to review.
   The **Comparison: New versus Existing** screen appears.
3. Review the compared existing and new approval transactions.
4. Click **Revert to Original**.
   The **Rejection/Cancelation Reason** window appears. It contains the following fields:

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Field Name	Field Description	Mandatory (Yes or No)
Approval Workflow Reason	Used to search a particular approval workflow reason.	Yes
Comments	Used to specify additional information while rejecting the usage record.	Yes

5. Enter the required details.
   A **Comparison: New versus Existing** screen appears where you can view the changes in the new transaction as compared to the existing ones.

   Note:

   By default, any modifications will be highlighted in the Yellow (9933FF) color and new additions will be highlighted in the Purple (FFFF66) color. You can easily change these default colors. For more information on how to set the colors used for highlighting, see Setting the C1_AXENTITY Feature Configuration on page 4436.

6. Click **OK**.
   The approval transaction is removed from the search results.

Related Topics

For more information on...	See...
Search Approval Transaction zone	Search Approval Transaction on page 976
Comparison: New versus Existing screen	Comparison: New versus Existing on page 981
How to approve an approval transaction	Approving an Approval Transaction on page 981
How to search for an approval transaction	Searching for an Approval Transaction on page 980

Modifying an Approval Transaction

Prerequisites

To modify an approval transaction, you should have:

- Characteristic Types defined in the application.

Procedure

To Modify an approval transaction:

1. Search for approval transactions with task details and status as Modify in the **Approval Transaction** screen.

   Note: ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.

2. From the **Main** menu, select **Approval Workflow** and then click **Approval Transaction**.
   A screen appears where you can review the changes, and accordingly modify or resolve the request based on your observations. In case where the submitter action is **Update (UPD)**, you will be able to compare the existing and new data, and accordingly take an action.
3. Modify the required details.
4. Click **Save**.
   The modifications made to the approval transaction are saved.

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Related Topics

For more information on...	See...
Approval Transaction screen	Approval Transaction on page 975
Search Approval Transaction zone	Search Approval Transaction on page 976
How to search for an approval transaction	Searching for an Approval Transaction on page 980

Withdrawing an Approval Transaction

Procedure

To withdraw an approval transaction:

1. Click the **Menu** link in the **Application** toolbar.
   A list appears.
2. In the **Search Results** section, click the link in the **Withdraw** column corresponding *t*o the approval transaction which you want to withdraw.
   A message appears confirming whether you want to withdraw the approval transaction.
3. Click **OK**.
   A message appears confirming whether you want to delete the approval transaction.
4. Click **OK**.
   The approval transaction is deleted.

Related Topics

For more information on...	See...
Approval Transaction screen	Approval Transaction on page 975
Search Approval Transaction zone	Search Approval Transaction on page 976
How to search for an approval transaction	Searching for an Approval Transaction on page 980

Resolving an Approval Transaction

Prerequisites

To resolve an approval transaction, you should have:

- Characteristic Types defined in the application.

Procedure

To resolve an approval transaction:

1. Search for approval transactions with task details and status as Resolve in the **Approval Transaction** screen.
   A list appears.
2. In the **Search Results** section, click the link in the **Approval Transaction ID** column corresponding *t*o the approval transaction which you want to resolve.
   A screen appears where you can review the changes, and accordingly modify or resolve the request based on your observations. In case where the submitter action is Update (UPD), you will be able to compare the existing and new data, and accordingly take an action.
3. Make the required changes.
4. Click **Save**.

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The changes resolve for the approval transaction are saved.

Related Topics

For more information on...	See...
Approval Transaction screen	Approval Transaction on page 975
Search Approval Transaction zone	Search Approval Transaction on page 976
How to search for an approval transaction	Searching for an Approval Transaction on page 980

Approve Price Assignment

The **Approve Price Assignment** screen allows you to search for the price assignment requests that are pending in your workflow for approval. You can review the changes, and accordingly approve, reject or cancel the request based on your observations. It contains the following zones:

- Search on page 986
- List of Price Assignments on page 989
- Approve Price Assignment - Comparison: New versus Existing on page 990
- Approval Transaction Log on page 979

Search

The **Search** zone allows you to search for the price assignment requests that are pending in your workflow for approval. It contains the following two sections:

- **Search Criteria** - The **Search Criteria** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Search By	Used to indicate whether you want to search for price assignments using the account, person, price list, submitter ID or transaction ID. The valid values are: • Person • Account • Price List • Submitter ID • Approval Transaction ID **Note:** By default, the **Person** option is selected.	Yes
Division	Used to search price assignments which are associated with a particular division. **Note:** You can only view those divisions to which you have access in the **Division** list. This field appears when you select the **Person** or **Account** option from the **Search By** list.	No

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Field Name	Field Description	Mandatory (Yes or No)
Person Identifier Type	Used to specify the value for the person identifier type. **Note:** This field appears when you select the **Person** option from the **Search By** list.	Yes (Conditional) **Note:** If you enter the person identifier as a search criteria, you have to select the person identifier type.
Person Identifier	Used to specify the ID linked to the person. **Note:** This field appears when you select the **Person** option from the **Search By** list.	Yes (Conditional) **Note:** If you specify the person identifier type as a search criteria, you have to enter the person identifier.
Account ID	Used to search price assignments which are created for a particular account. **Note:** This field appears when you select the **Account** option from the **Search By** list.	No
Account Identifier Type	Used to select the identifier type based on which you want to search price assignments of an account. **Note:** This field appears when you select the **Account** option from the **Search By** list.	Yes (Conditional) **Note:** If you enter the account identifier as a search criteria, you have to select the account identifier type.
Account Identifier	Used to specify the account whose price assignments you want to view. **Note:** This field appears when you select the **Account** option from the **Search By** list.	Yes (Conditional) **Note:** If you specify the account identifier type as a search criteria, you have to enter the account identifier.
Price List Description	Used to search price lists with a particular description. **Note:** This field appears when you select the **Price List** option from the **Search By** list.	No
Submitter ID	Used to search for price assignment requests that are created by a particular submitter. **Note:** This field appears when you select the **Submitter ID** option from the **Search By** list.	No
Approval Transaction ID	This field appears when you select the **Approval Transaction ID** option from the **Search By** list.	No

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The approval transaction ID is generated automatically when the price assignment request is created. This field appears when you select the **Transaction ID** option from the **Search By** list.	

Note: You must specify at least one search criterion while searching for a price assignment.

- **Search Results** - On clicking the **Search** button, the search results appear based on the specified search criteria. It contains the following columns:

Column Name	Column Description
Account ID	Displays the account ID. **Note:** This column appears only when you select the **Account** option from the **Search By** list.
Account Identifier Type	Indicates the account identifier type of the account for the price assignments. **Note:** This column appears when you select the **Account** option from the **Search By** list.
Account Identifier	Displays the value of the account identifier type. **Note:** This column appears when you select the **Account** option from the **Search By** list.
Price List ID	**Note:** This column appears when you select the **Price List** option from the **Search By** list.
Price List Description	Displays the description for the price list. **Note:** This column appears when you select the **Price List** option from the **Search By** list.
Person Identifier	**Note:** This column appears when you select the **Person** option from the **Search By** list.
Person Name	Displays the name of the person. **Note:** This column appears when you select the **Person** option from the **Search By** list.
Division	Displays the division to which the account, person, or price list belongs.
Submitter ID	Displays the ID of the submitter. **Note:** This column appears when you select the **Submitter ID** option from the **Search By** list.
Approval Transaction ID	Displays the approval transaction ID.

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Column Name	Column Description
	Note: This column appears when you select the **Approval Transaction ID** option from the **Search By** list.

On clicking the **Broadcast** (📡) icon corresponding to the account, person, price list, or submitter ID the **List of Price Assignments** zone appears with the list of price assignments.

Related Topics

For more information on...	See...
List of Price Assignments zone	List of Price Assignments on page 1006
How to approve a price assignment for an account	Approving a Price Assignment for an Account on page 992
How to approve a price assignment for a person	Approving a Price Assignment for a Person on page 993
How to approve a price assignment for a price list	Approving a Price Assignment for a Price List on page 994
How to reject a price assignment for an account	Rejecting a Price Assignment for an Account on page 995
How to reject a price assignment for a person	Rejecting a Price Assignment for a Person on page 996
How to reject a price assignment for a price list	Rejecting a Price Assignment for a Price List on page 998
How to cancel a price assignment for an account	Canceling a Price Assignment for an Account on page 999
How to cancel a price assignment for a person	Canceling a Price Assignment for a Person on page 1000
How to cancel a price assignment for a price list	Canceling a Price Assignment for a Price List on page 1002

List of Price Assignments

The **List of Price Assignments** zone lists price assignment requests specific to an account, a person, or a price list. It contains the following columns:

Column Name	Column Description
Approval Transaction ID	Displays the approval transaction id.
	Note: The approval transaction id is generated automatically when the price assignment request is created.
Submitter Name	Displays the name of the submitter.
Action	Indicates the type of action, such as **Add**, **Update (UPD)**, or **Delete (DEL)** performed by the submitter during price assignment.
Submitted On	Indicates the submitter who has created the price assignment request.
To Do Type	Displays the type of To Do (notification) received for the price assignment request.
Price Item	Displays the price item or price item code.
Description	Displays the description of the price item or price item code.
Pricing Currency	Indicates the currency in which the price item pricing is defined.
Start Date	Displays the date from when the price item pricing is effective.

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Column Name	Column Description
End Date	Displays the date till when the price item pricing is effective.
Approval Transaction Information	Displays the additional information of an approval transaction.

Note:

By default, the **List of Price Assignments** zone does not appear in the **Approve Price Assignment** screen. It appears when you click the **Broadcast** (📡) icon corresponding to the account, person, or price list in the **Search** zone.

Related Topics

For more information on...	See...
Search Approve Price Assignment zone	Search on page 986
Comparison: New versus Existing zone	Approve Price Assignment - Comparison: New versus Existing on page 990
How to approve a price assignment for an account	Approving a Price Assignment for an Account on page 992
How to approve a price assignment for a person	Approving a Price Assignment for a Person on page 993
How to approve a price assignment for a price list	Approving a Price Assignment for a Price List on page 994
How to reject a price assignment for an account	Rejecting a Price Assignment for an Account on page 995
How to reject a price assignment for a person	Rejecting a Price Assignment for a Person on page 996
How to reject a price assignment for a price list	Rejecting a Price Assignment for a Price List on page 998
How to cancel a price assignment for an account	Canceling a Price Assignment for an Account on page 999
How to cancel a price assignment for a person	Canceling a Price Assignment for a Person on page 1000
How to cancel a price assignment for a price list	Canceling a Price Assignment for a Price List on page 1002

Approve Price Assignment - Comparison: New versus Existing

The **Comparison: New versus Existing** zone lists the existing and the new price assignments defined in the system. You can approve, cancel, reject a price assignment through this zone. It contains the following fields:

Field Name	Field Description
Approval Transaction ID	Displays the approval transaction id.
Submitter ID	Displays the submitter id who has created the price assignment request.
Approval Transaction Information	Displays information about the approval transaction
Action	Indicates the action that can be performed on the price assignment. The valid values are: • Add - Allows you to define the tiering setup of the price assignment • DEL - Allows you to delete the tiering setup of the price assignment. • UPD - Allows you to upload the tiering setup of the price assignment.

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In addition to the above fields, this zone also contains the following two sections:

- **New** - It consists of the new approved price assignments.
- **Existing** - It consists of the existing or old price assignments.

In addition, this zone also contains the following buttons:

Button Name	Button Description
Approve	Used to approve the price assignment.
Return to Submitter	Used to reject the price assignment.
Revert to Original	Used to cancel the price assignment.

Note:

By default, the **Comparison: New versus Existing** zone does not appear in the **Approve Price Assignment** screen. It appears when you click the **Broadcast** (📡) icon corresponding to the approval transaction ID in the **List Of Price Assignments** zone.

The changes made are highlighted in both the sections for the respective fields. The fields change according to the price assignments.

You can click on **Approve** button, **Return to Submitter** button, or **Revert to Original** button to **Approve**, **Reject** or **Cancel** the price assignments, respectively.

Related Topics

For more information on...	See...
Search Approve Price Assignment zone	Search on page 986
List of Price Assignments zone	List of Price Assignments on page 1006
How to approve a price assignment for an account	Approving a Price Assignment for an Account on page 992
How to approve a price assignment for a person	Approving a Price Assignment for a Person on page 993
How to approve a price assignment for a price list	Approving a Price Assignment for a Price List on page 994
How to reject a price assignment for an account	Rejecting a Price Assignment for an Account on page 995
How to reject a price assignment for a person	Rejecting a Price Assignment for a Person on page 996
How to reject a price assignment for a price list	Rejecting a Price Assignment for a Price List on page 998
How to cancel a price assignment for an account	Canceling a Price Assignment for an Account on page 999
How to cancel a price assignment for a person	Canceling a Price Assignment for a Person on page 1000
How to cancel a price assignment for a price list	Canceling a Price Assignment for a Price List on page 1002

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Approval Transaction Log

The **Approval Transaction Log** zone displays the complete trail of submitter and approver actions performed on the approval transaction. It contains the following columns:

Column Name	Column Description
Date Time	Displays the date and time when the action was performed on the approval transaction.
User Name	Indicates the user who has performed the action on the approval transaction.
Status	Indicates the status of the approval transaction. The valid values are: • Approved • Cancelled • Rejected • Inprocess • Pending • Initial • Deleted
Status Reason	Indicates the reason why the approval transaction was rejected or cancelled.
Comments	Displays the additional details entered by the approver on rejecting or cancelling the approval transaction.

Note:

By default, the **Approval Transaction Log** zone does not appear in the **Approve Price Assignment** screen. It appears when you click the **Broadcast** ( ) icon corresponding to the approval transaction ID in the **List Of Price Assignments** zone.

You can change the layout of this zone. For more information on how to change the layout, see Changing the Layout on page 4410.

Related Topics

For more information on...	See...
List Of Price Assignments zone	List of Price Assignments on page 1006

Approving a Price Assignment for an Account

You can view the number of price assignments which are pending for approval in the **Approve Price Assignment** screen. The approver can review, and accordingly approve, reject or cancel the price assignment based on the observations.

Note: The system will not allow you to approve, reject or cancel a price assignment submitted by you.

Procedure

To approve a price assignment for an account:

1. Click the **Menu** link in the **Application** toolbar.
   A list appears.
2. From the **Main** menu, select **Approval Workflow** and then click **Approve Price Assignment**.
   The **Approve Price Assignment** screen appears.

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3. Enter the search criteria in the **Search** zone.

> **Note:** ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.

4. Click **Search**.
   A list of accounts that meet the search criteria appears in the **Search Results** section.
5. Click the **Broadcast** (ᯤ) icon corresponding to the account whose price assignments you want to review *f*or approval.
   The **List of Price Assignments** zone appears.
6. In the **List of Price Assignments** zone, click the **Broadcast** (ᯤ) icon corresponding to the price assignment whose details you want to review and approve.
   The **Comparison: New Versus Existing** zone appears.

> **Note:**
>
> By default, any modifications will be highlighted in the Yellow (9933FF) color and new additions will be highlighted in the Purple (FFFF66) color. You can easily change these default colors. For more information on how to set the colors used for highlighting, see Setting the C1_AXENTITY Feature Configuration on page 4436.
>
> Only those users who have access to the application services for each business object within the approval workflow group will be able to view the details of the price assignment request.

7. Review the compared existing and new approval transactions.
   A message appears indicating that the price assignment request is sent to the approver at the next level in the hierarchy for approval. However, if you are the last approver in the hierarchy, a message appears indicating that the price assignment request is approved successfully.
8. Click **Approve**.
   A message appears with confirmation on transaction approved successfully.

> **Tip:** Alternatively, in the **List of Price Assignments** zone, you can select the check box corresponding to the price assignment request that you want to approve and then click **Approve**.

9. Click **OK**.
   The approval transaction is removed from the **List of Price Assignments** zone.

Related Topics

For more information on...	See...
Approve Price Assignment screen	Approve Price Assignment on page 986
Search zone	Search on page 986
List of Price Assignments zone	List of Price Assignments on page 989
Comparison: New versus Existing zone	Comparison: New versus Existing on page 981

Approving a Price Assignment for a Person

Procedure

To approve a price assignment for a person:

1. Click the **Menu** link in the **Actions/Navigation** area.
   A list appears.

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2. From the **Main** menu, select **Approval Workflow** and then click **Approve Price Assignment**.
   The **Approve Price Assignment** screen appears.
3. In the **Search** zone, enter the search criteria by selecting **Person** in the **Search By** field.

> **Note:**
>
> ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.
>
> The **Search Results** appear when**Person Identifier Type** and **Person Identifier** fields are entered.

4. Click **Search**.
   A list of persons that meet the search criteria appears in the **Search Results** section.
5. Click the **Broadcast** (📡) icon corresponding to the person whose price assignments you want to review *f*or approval.
   The **List of Price Assignments** zone appears.
6. Click the **Broadcast** (📡) icon corresponding to the **Transaction Id** in the **List of Price Assignments** zone, *w*hose details you want to view and approve.
   The **Comparison: New Versus Existing** zone appears.

> **Note:**
>
> By default, any modifications will be highlighted in the Yellow (9933FF) color and new additions will be highlighted in the Purple (FFFF66) color. You can easily change these default colors. For more information on how to set the colors used for highlighting, see Setting the C1_AXENTITY Feature Configuration on page 4436.
>
> Only those users who have access to the application services for each business object within the approval workflow group will be able to view the details of the price assignment request.

7. Review the pricing details, tiering ranges, and price assignment characteristics, and if they are accurate, then click **Approve**.
   A message appears indicating that the price assignment request is sent to the approver at the next level in the hierarchy for approval. However, if you are the last approver in the hierarchy, a message appears indicating that the price assignment request is approved successfully.
8. Click **OK**.
   A To Do (notification) is sent to the approver at the next level in the hierarchy. You will no longer be able to view this request in your workflow for approval. In case you are the last approver in the hierarchy, the changes are committed to the database.

> **Tip:** Alternatively, in the **List of Price Assignments** zone, you can select the check box corresponding to the price assignment request that you want to approve, and then click **Approve**.

Related Topics

For more information on...	See...
Approve Price Assignment screen	Approve Price Assignment on page 986
Search zone	Search on page 986
List of Price Assignments zone	List of Price Assignments on page 989

Approving a Price Assignment for a Price List

Procedure

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To approve a price assignment for a price list:

1. Click the **Menu** link in the **Application** toolbar.
   A list appears.
2. From the **Main** menu, select **Approval Workflow** and then click **Approve Price Assignment**.
   The **Approve Price Assignment** screen appears.
3. In the **Search** zone, enter the search criteria by selecting either **Price List** in the **Search By** field.

> **Note:** ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.

4. Click **Search**.
   A list of price lists that meet the search criteria appears in the **Search Results** section.
5. Click the **Broadcast** (ᯤ) icon corresponding to the price list whose price assignments you want to review *f*or approval.
   The **List of Price Assignments** zone appears.
6. Click the **Broadcast** (ᯤ) icon corresponding to the **Transaction Id** in the **List of Price Assignments** zone, *w*hose details you want to view and approve.
   The **Comparison: New Versus Existing** zone appears.
7. Review the pricing details, tiering ranges, and price assignment characteristics, and if they are accurate, then click **Approve**.
   A message appears indicating that the price assignment request is sent to the approver at the next level in the hierarchy for approval. However, if you are the last approver in the hierarchy, a message appears indicating that the price assignment request is approved successfully.
8. Click **OK**.
   A To Do (notification) is sent to the approver at the next level in the hierarchy. You will no longer be able to view this request in your workflow for approval. In case you are the last approver in the hierarchy, the changes are committed to the database.

> **Tip:** Alternatively, in the **List of Price Assignments** zone, you can select the check box corresponding to the price assignment request that you want to approve, and then click **Approve**.

Related Topics

For more information on...	See...
Approve Price Assignment screen	Approve Price Assignment on page 986
Search zone	Search on page 986
List of Price Assignments zone	List of Price Assignments on page 989

Rejecting a Price Assignment for an Account

Procedure

To reject a price assignment for an account:

1. Click the **Menu** link in the **Application** toolbar.
   A list appears.
2. From the **Main** menu, select **Approval Workflow** and then click **Approve Price Assignment**.
   The **Approve Price Assignment** screen appears.
3. In the **Search** zone, enter the search criteria by selecting either **Account** in the **Search By** field.

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> **Note:** ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.

4. Click **Search**.
   A list of accounts that meet the search criteria appears in the **Search Results** section.
5. Click the **Broadcast** (📡) icon corresponding to the account whose price assignments you want to review *f*or approval.
   The **List of Price Assignments** zone appears.
6. Click the **Broadcast** (📡) icon corresponding to the **Transaction Id** in the **List of Price Assignments** zone, *w*hose details you want to view and approve.
   The **Comparison: New Versus Existing** zone appears.

> **Note:**
>
> By default, any modifications will be highlighted in the Yellow (9933FF) color and new additions will be highlighted in the Purple (FFFF66) color. You can easily change these default colors. For more information on how to set the colors used for highlighting, see Setting the C1_AXENTITY Feature Configuration on page 4436.
>
> Only those users who have access to the application services for each business object within the approval workflow group will be able to view the details of the price assignment request.

7. Review the pricing details, tiering ranges, and price assignment characteristics, and if they are not appropriate, *t*hen click **Return to Submitter**.
   The **Rejection/Cancellation Reason** screen appears.

> **Tip:** Alternatively, in the **List of Price Assignments** zone, you can select the check box corresponding to the price assignment request that you want to reject, and then click **Return to Submitter**.

8. Select the reason for rejecting the price assignment request and enter the comments in the respective field.
9. Click **OK**.
   The **Approve** and **Revert to Original** buttons are disabled. You will no longer be able to view this request in your workflow for approval.

Related Topics

For more information on...	See...
Approve Price Assignment screen	Approve Price Assignment on page 986
Search zone	Search on page 986
List of Price Assignments zone	List of Price Assignments on page 989

Rejecting a Price Assignment for a Person

You can view the number of price assignments which are pending for approval in the **Approve Price Assignment** screen. You can review, and accordingly approve, reject or cancel the price assignment based on the observations.

> **Note:** The system will not allow you to approve, reject or cancel a price assignment submitted by you.

Procedure

To reject a price assignment for a person:

1. Click the **Menu** link in the **Application** toolbar.
   A list appears.

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2. From the **Main** menu, select **Approval Workflow** and then click **Approve Price Assignment**.
   The **Approve Price Assignment** screen appears.
3. Enter the search criteria in the **Search** zone.

> **Note:** ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.

4. Click **Search**.
   A list of persons that meet the search criteria appears in the **Search Results** section.
5. Click the **Broadcast** (ᯤ) icon corresponding to the person whose price assignments you want to review.
   The **List of Price Assignments** zone appears.
6. In the **List of Price Assignments** zone, click the **Broadcast** (ᯤ) icon corresponding to the price assignment whose details you want to review.
   The **Comparison: New Versus Existing** zone appears.

> **Note:**
>
> By default, any modifications will be highlighted in the Yellow (9933FF) color and new additions will be highlighted in the Purple (FFFF66) color. You can easily change these default colors. For more information on how to set the colors used for highlighting, see Setting the C1_AXENTITY Feature Configuration on page 4436.
>
> Only those users who have access to the application services for each business object within the approval workflow group will be able to view the details of the price assignment request.

7. Review the compared existing and new approval transactions.
   The **Rejection/Cancellation Reason** screen appears. It contains following fields:

Field Name	Field Description	Mandatory (Yes or No)
Reason Code	Used to specify the reason why the approval workflow request is rejected.	Yes
Rejection/Cancellation Comment	Used to specify additional information while rejecting/ cancelling the approval workflow request.	Yes

> **Tip:** Alternatively, in the **List of Price Assignments** zone, you can select the check box corresponding to the price assignment request that you want to reject, and then click **Return to Submitter**.

8. Click **Return to Submitter**.
   The **Rejection/Cancelation Reason** screen appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Approval Workflow Reason	Used to search a particular approval workflow reason.	Yes
Comments	Used to add additional comments.	No

9. Enter the required details.
10. Click **OK**.
    The approval transaction is removed from the **List of Price Assignments** zone.

> **Note:** Alternatively, you can cancel the price assignment by selecting the check box corresponding to the price assignment which you want to cancel and then click the **Revert to Original** button in the **List of Price Assignments** zone.

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Related Topics

For more information on...	See...
Approve Price Assignment screen	Approve Price Assignment on page 986
Search zone	Search on page 986
List of Price Assignments zone	List of Price Assignments on page 989
Comparison: New versus Existing zone	Comparison: New versus Existing on page 981

Rejecting a Price Assignment for a Price List

You can view the number of price assignments which are pending for approval in the **Approve Price Assignment** screen. You can review, and accordingly approve, reject or cancel the price assignment based on the observations.

Note: The system will not allow you to approve, reject or cancel a price assignment submitted by you.

Procedure

To reject a price assignment for a price list:

1. Click the **Menu** link in the **Actions/Navigation** area.
   A list appears.
2. From the **Main** menu, select **Approval Workflow** and then click **Approve Price Assignment**.
   The **Approve Price Assignment** screen appears.
3. Enter the search criteria in the **Search** zone.

   Note: ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.
4. Click **Search**.
   A list of price lists that meet the search criteria appears in the **Search Results** section.
5. Click the **Broadcast** (ᯤ) icon corresponding to the price list whose price assignments you want to review.
   The **List of Price Assignments** zone appears.
6. In the **List of Price Assignments** zone, click the **Broadcast** (ᯤ) icon corresponding to the price assignment whose details you want to review.
   The **Comparison: New Versus Existing** zone appears.

   Note:

   By default, any modifications will be highlighted in the Yellow (9933FF) color and new additions will be highlighted in the Purple (FFFF66) color. You can easily change these default colors. For more information on how to set the colors used for highlighting, see Setting the C1_AXENTITY Feature Configuration on page 4436.

   Only those users who have access to the application services for each business object within the approval workflow group will be able to view the details of the price assignment request.
7. Review the compared existing and new approval transactions.
   The **Rejection/Cancellation Reason** screen appears.

   Tip: Alternatively, in the **List of Price Assignments** zone, you can select the check box corresponding to the price assignment request that you want to reject, and then click **Return to Submitter**.
8. Click **Return to Submitter**.

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The **Rejection/Cancelation Reason** screen appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Approval Workflow Reason	Used to search a particular approval workflow reason.	Yes
Comments	Used to add additional comments.	No

9. Enter the required details.
   The **Approve** and **Revert to Original** buttons are disabled.
10. Click **OK**.
    The approval transaction is removed from the **List of Price Assignments** zone.

Tip: Alternatively, you can reject the price assignment by selecting the check box corresponding to the price assignment which you want to reject and then click the **Return to Submitter** button in the **List of Price Assignments** zone.

Related Topics

For more information on...	See...
Approve Price Assignment screen	Approve Price Assignment on page 986
Search zone	Search on page 986
List of Price Assignments zone	List of Price Assignments on page 989
Comparison: New versus Existing zone	Comparison: New versus Existing on page 981

Canceling a Price Assignment for an Account

You can view the number of price assignments which are pending for approval in the **Approve Price Assignment** screen. You can review, and accordingly approve, reject or cancel the price assignment based on the observations.

Note: The system will not allow you to approve, reject or cancel a price assignment submitted by you.

Procedure

To cancel a price assignment for an account:

1. Click the **Menu** link in the **Application** toolbar.
   A list appears.
2. From the **Main** menu, select **Approval Workflow** and then click **Approve Price Assignment**.
   The **Approve Price Assignment** screen appears.
3. Enter the search criteria in the **Search** zone.

Note: ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.

4. Click **Search**.
   A list of accounts that meet the search criteria appears in the **Search Results** section.
5. Click the **Broadcast** (📡) icon corresponding to the account whose price assignments you want to review.
   The **List of Price Assignments** zone appears.

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6. In the **List of Price Assignments** zone, click the **Broadcast** (📡) icon corresponding to the price assignment whose details you want to review.
   The **Comparison: New Versus Existing** zone appears.

   Note:

   By default, any modifications will be highlighted in the Yellow (9933FF) color and new additions will be highlighted in the Purple (FFFF66) color. You can easily change these default colors. For more information on how to set the colors used for highlighting, see Setting the C1_AXENTITY Feature Configuration on page 4436.

   Only those users who have access to the application services for each business object within the approval workflow group will be able to view the details of the price assignment request.

7. Review the compared existing and new approval transactions.
   The **Rejection/Cancelation Reason** screen appears.

   Tip: Alternatively, in the **List of Price Assignments** zone, you can select the check box corresponding to the price assignment request that you want to reject, and then click **Revert to Original**.

8. Click **Revert to Original**.
   The **Rejection/Cancelation Reason** screen appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Approval Workflow Reason	Used to search a particular approval workflow reason.	Yes
Comments	Used to add additional comments.	No

9. Enter the required details.
10. Click **OK**.
    The approval transaction is removed from the **List of Price Assignments** zone.

    Tip: Alternatively, you can cancel the price assignment by selecting the check box corresponding to the price assignment which you want to cancel and then click the **Revert to Original** button in the **List of Price Assignments** zone.

Related Topics

For more information on...	See...
Approve Price Assignment screen	Approve Price Assignment on page 986
Search zone	Search on page 986
List of Price Assignments zone	List of Price Assignments on page 989
Comparison: New versus Existing zone	Comparison: New versus Existing on page 981

Canceling a Price Assignment for a Person

You can view the number of price assignments which are pending for approval in the **Approve Price Assignment** screen. You can review, and accordingly approve, reject or cancel the price assignment based on the observations.

Note: The system will not allow you to approve, reject or cancel a price assignment submitted by you.

Procedure

To cancel a price assignment for a person:

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1. Click the **Menu** link in the **Application** toolbar.
   A list appears.
2. From the **Main** menu, select **Approval Workflow** and then click **Approve Price Assignment**.
   The **Approve Price Assignment** screen appears.
3. Enter the search criteria in the **Search** zone.

> **Note:** ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.

4. Click **Search**.
   A list of accounts that meet the search criteria appears in the **Search Results** section.
5. Click the **Broadcast** (ᯤ) icon corresponding to the account whose price assignments you want to review.
   The **List of Price Assignments** zone appears.
6. In the **List of Price Assignments** zone, click the **Broadcast** (ᯤ) icon corresponding to the price assignment whose details you want to review.
   The **Comparison: New Versus Existing** zone appears.

> **Note:**
>
> By default, any modifications will be highlighted in the Yellow (9933FF) color and new additions will be highlighted in the Purple (FFFF66) color. You can easily change these default colors. For more information on how to set the colors used for highlighting, see Setting the C1_AXENTITY Feature Configuration on page 4436.
>
> Only those users who have access to the application services for each business object within the approval workflow group will be able to view the details of the price assignment request.

7. Review the compared existing and new approval transactions.
   The **Rejection/Cancelation Reason** screen appears.

> **Tip:** Alternatively, in the **List of Price Assignments** zone, you can select the check box corresponding to the price assignment request that you want to reject, and then click **Revert to Original**.

8. Click **Revert to Original**.
   The **Rejection/Cancelation Reason** screen appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Approval Workflow Reason	Used to search a particular approval workflow reason.	Yes
Comments	Used to add additional comments.	No

9. Enter the required details.
10. Click **OK**.
    The approval transaction is removed from the **List of Price Assignments** zone.

> **Tip:** Alternatively, you can cancel the price assignment by selecting the check box corresponding to the price assignment which you want to cancel and then click the **Revert to Original** button in the **List of Price Assignments** zone.

Related Topics

For more information on...	See...
Approve Price Assignment screen	Approve Price Assignment on page 986

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For more information on...	See...
Search zone	Search on page 986
List of Price Assignments zone	List of Price Assignments on page 989
Comparison: New versus Existing zone	Comparison: New versus Existing on page 981

Canceling a Price Assignment for a Price List

You can view the number of price assignments which are pending for approval in the **Approve Price Assignment** screen. You can review, and accordingly approve, reject or cancel the price assignment based on the observations.

Note: The system will not allow you to approve, reject or cancel a price assignment submitted by you.

Procedure

To cancel a price assignment for a price list:

1. Click the **Menu** link in the **Application** toolbar.
   A list appears.
2. From the **Main** menu, select **Approval Workflow** and then click **Approve Price Assignment**.
   The **Approve Price Assignment** screen appears.
3. Enter the search criteria in the **Search** zone.

   Note: ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.
4. Click **Search**.
   A list of price lists that meet the search criteria appears in the **Search Results** section.
5. Click the **Broadcast** (📡) icon corresponding to the price list whose price assignments you want to review.
   The **List of Price Assignments** zone appears.
6. In the **List of Price Assignments** zone, click the **Broadcast** (📡) icon corresponding to the price assignment whose details you want to review.
   The **Comparison: New Versus Existing** zone appears.
7. Review the compared existing and new approval transactions.
   The **Rejection/Cancellation Reason** screen appears.

   Tip: Alternatively, in the **List of Price Assignments** zone, you can select the check box corresponding to the price assignment request that you want to cancel, and then click **Revert to Original**.
8. Click **Revert to Original**.
   The **Rejection/Cancelation Reason** screen appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Approval Workflow Reason	Used to search a particular approval workflow reason.	Yes
Comments	Used to add additional comments.	No

9. Enter the required details.
10. Click **OK**.
    The approval transaction is removed from the **List of Price Assignments** zone.

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> **Tip:** Alternatively, you can cancel the price assignment by selecting the check box corresponding to the price assignment which you want to cancel and then click the **Revert to Original** button in the **List of Price Assignments** zone.

Related Topics

For more information on...	See...
Approve Price Assignment screen	Approve Price Assignment on page 986
Search zone	Search on page 986
List of Price Assignments zone	List of Price Assignments on page 989
Comparison: New versus Existing zone	Comparison: New versus Existing on page 981

Modify Price Assignment

The submitter has the facility to modify or withdraw a price assignment request before the approver at the first level in the hierarchy approves or rejects the request. Once the changes are made, the submitter submits the request for approval.

The **Modify Price Assignment** screen allows you to modify or withdraw a price assignment request. It contains the following zones:

- Search on page 1003
- List of Price Assignments on page 1016

Search

The **Search** zone allows you to search for the price assignment request using various search criteria. This zone contains the following two sections:

- **Search Criteria** - The **Search Criteria** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Search By	Used to indicate whether you want to search for price assignments using the account, person, price list, submitter ID or transaction ID. The valid values are: • Person • Account • Price List • Submitter ID • Approval Transaction ID **Note:** By default, the **Person** option is selected.	Yes
Division	Used to search price assignments which are associated with a particular division.	No

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Field Name	Field Description	Mandatory (Yes or No)
	Note: You can only view those divisions to which you have access in the **Division** list. This field appears when you select the **Person** or **Account** option from the **Search By** list.	
Person Identifier Type	Used to select the identifier type based on which you want to search price assignments through which the person's record is created or updated in the system. **Note:** This field appears when you select the **Person** option from the **Search By** list.	Yes (Conditional) **Note:** If you enter the person identifier as a search criteria, you have to select the person identifier type.
Person Identifier	Used to specify the value for the person identifier type.	Yes (Conditional) **Note:** If you specify the person identifier type as a search criteria, you have to enter the person identifier.
Account ID	Used to search price assignments which are created for a particular account. **Note:** This field appears when you select the **Account** option from the **Search By** list.	No
Account Identifier Type	Used to select the identifier type based on which you want to search price assignments of an account. **Note:** This field appears when you select the **Account** option from the **Search By** list.	Yes (Conditional) **Note:** If you enter the account identifier as a search criteria, you have to select the account identifier type.
Account Identifier	Used to specify the account whose price assignments you want to view. **Note:** This field appears when you select the **Account** option from the **Search By** list.	Yes (Conditional) **Note:** If you specify the account identifier type as a search criteria, you have to enter the account identifier.
Price List Description	Used to search price lists with a particular description. **Note:** This field appears when you select the **Price List** option from the **Search By** list.	No
Submitter ID	Used to search for price assignment requests that are created by a particular submitter.	No

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Field Name	Field Description	Mandatory (Yes or No)
	Note: This field appears when you select the **Submitter ID** option from the **Search By** list.	
Approval Transaction ID	Used to search the price assignment request using the approval transaction ID. **Note:** The approval transaction ID is generated automatically when the price assignment request is created. This field appears when you select the **Approval Transaction ID** option from the **Search By** list.	No

Note: You must specify at least one search criterion while searching for a price assignment.

- **Search Results** - On clicking the **Search** button, the search results appear based on the specified search criteria. The **Search Results** section contains the following columns:

Column Name	Column Description
Person Identifier	Indicates the person for whom the price assignment is created. **Note:** This column appears when you select the **Person** or **Submitter ID** option from the **Search By** list.
Person Name	Displays the name of the person. **Note:** This column appears when you select the **Person** or **Submitter ID** option from the **Search By** list.
Person Identifier Type	Displays the person identifier type. **Note:** This column appears when you select the **Submitter ID** option from the **Search By** list.
Division	Displays the division to which the account, person, or price list belongs.
Account Information	Displays information about the account. In addition, this column has a context menu which helps in navigating to other screens in the application. **Note:** This column appears when you select the **Account** or **Submitter ID** option from the **Search By** list. It has a link. On clicking the link, the **Account** screen appears where you can view the details of the respective account.
Account Identifier Type	Indicates the account identifier type of the account for the price assignments. **Note:** This column appears when you select the **Account** or **Submitter ID** option from the **Search By** list.
Account Identifier	Displays the value of the account identifier type.

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Column Name	Column Description
	Note: This column appears when you select the **Account** or **Submitter ID** option from the **Search By** list.
Price List ID	Displays the price list ID.
	Note: This column appears only when you select the **Price List** option from the **Search By** list.
Price List Description	Displays the description for the price list.
	Note: This column appears when you select the **Price List** option from the **Search By** list.
	Note: This column appears when you are searching for price assignment requests of a price list.
Submitter ID	Displays the ID of the submitter.
	Note: This column appears when you select the **Submitter ID** option from the **Search By** list.

On clicking the **Broadcast** (📡) icon corresponding to the account, person, price list, or submitter ID the **List of Price Assignments** zone appears with the list of price assignments.

Related Topics

For more information on...	See...
List of Price Assignments zone	List of Price Assignments on page 1006
How to modify a price assignment for an account	Modifying a Price Assignment for an Account on page 1008
How to modify a price assignment for a person	Modifying a Price Assignment for a Person on page 1008
How to modify a price assignment for a price list	Modifying a Price Assignment for a Price List on page 1009
How to withdraw a price assignment for an account	Withdrawing a Price Assignment for an Account on page 1010
How to withdraw a price assignment for a person	Withdrawing a Price Assignment for a Person on page 1011
How to withdraw a price assignment for a price list	Withdrawing a Price Assignment for a Price List on page 1012

List of Price Assignments

The **List of Price Assignments** zone lists price assignment requests specific to an account, a person, or a price list. It contains the following columns:

Column Name	Column Description
Approval Transaction ID	Displays the approval transaction ID.

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Column Name	Column Description
	Note: The approval transaction id is generated automatically when the price assignment request is created.
Submitter Name	Indicates the submitter who has created the price assignment request.
Action	Indicates the type of action, such as **Add**, **Update (UPD)**, or **Delete (DEL)**, performed by the submitter during price assignment.
Submitted On	Displays the date and time when the price assignment request was created by the submitter.
To Do Type	Displays the type of To Do (notification) received for the price assignment request.
Price Item	Displays the price item or price item code.
Description	Displays the description of the price item or price item code.
Pricing Currency	Indicates the currency in which the price item pricing is defined.
Start Date	Displays the date from when the price item pricing is effective.
End Date	Displays the date till when the price item pricing is effective.
Approval Transaction Information	Displays information about the approval transaction.
	Note: This information string is generated using the **C1-APPTXNINF** algorithm.
Modify	It has a link. On clicking the **Modify** link, the **Modify/Resolve Price Assignment** screen appears where you can modify the price assignment.
Withdraw	It has a link. On clicking the **Withdraw** link, you can withdraw and remove the approval transaction from the list of price assignments.
View	It has a link. On clicking the **Log** link, you can view the approval transaction log details.

By default, the **List of Price Assignments** zone does not appear in the **Modify Price Assignment** screen. It appears when you click the **Broadcast** (📡) icon corresponding to the account, person, or price list in the **Search** zone.

Related Topics

For more information on...	See...
Modify Price Assignment Search zone	Search on page 1003
How to modify a price assignment for an account	Modifying a Price Assignment for an Account on page 1008
How to modify a price assignment for a person	Modifying a Price Assignment for a Person on page 1008
How to modify a price assignment for a price list	Modifying a Price Assignment for a Price List on page 1009
How to withdraw a price assignment for an account	Withdrawing a Price Assignment for an Account on page 1010
How to withdraw a price assignment for a person	Withdrawing a Price Assignment for a Person on page 1011
How to withdraw a price assignment for a price list	Withdrawing a Price Assignment for a Price List on page 1012

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Modifying a Price Assignment for an Account

You can view the number of price assignments which are pending for modification in the **Modify Price Assignment** screen. The modifier can review, and accordingly modify, withdraw or view log of the price assignment based on the observations.

Procedure

To modify a price assignment for an account:

1. Click the **Menu** link in the **Application** toolbar.
   A list appears.
2. From the **Main** menu, select **Approval Workflow** and then click **Modify Price Assignment**.
   The **Modify Price Assignment** screen appears.
3. Enter the search criteria in the **Search** zone.

   Note: ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.
4. Click **Search**.
   A list of accounts that meet the search criteria appears in the **Search Results** section.
5. Click the **Broadcast** ( ) icon corresponding to the account whose price assignments you want to review.
   The **List of Price Assignments** zone appears.
6. Click the **Modify** link in the **Modify** column corresponding to the price assignment that you want to modify.
   The **Modify/Resolve Price Assignment** screen appears.

   Note: Only those users who have access to the application services for each business object within the approval workflow group will be able to modify the details of the price assignment request.
7. Make the required changes.
8. Modify the required details.
   The changes made to the price assignment are saved.

Related Topics

For more information on...	See...
Modify Price Assignment screen	Modify Price Assignment on page 1003
Search zone	Search on page 1003
List of Price Assignments zone	List of Price Assignments on page 1006

Modifying a Price Assignment for a Person

Procedure

To modify a price assignment for a person:

1. Click the **Menu** link in the **Application** toolbar.
   A list appears.
2. From the **Main** menu, select **Approval Workflow** and then click **Modify Price Assignment**.
   The **Modify Price Assignment** screen appears.

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3. In the **Search** zone, enter the search criteria, such as the division to which the person belongs or the *p*erson identification type and value.

> **Note:** ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.

4. Click **Search**.
   A list of persons that meet the search criteria appears in the **Search Results** section.
5. Click the **Broadcast** (ᯤ) icon corresponding to the person whose price assignment requests you want to *m*odify.
   The **List of Price Assignments** zone appears.
6. Click the **Modify** link in the **Modify** column corresponding to the price assignment request that you want *t*o modify.
   The **Modify/Resolve Price Assignment** screen appears where you can modify the pricing details, tiering ranges, and price assignment characteristics.

> **Note:** Only those users who have access to the application services for each business object within the approval workflow group will be able to modify the details of the price assignment request.

7. Make the required changes.
8. Click **Save**.
   The price assignment for a person is updated.

Related Topics

For more information on...	See...
Modify Price Assignment screen	Modify Price Assignment on page 1003
Search zone	Search on page 1003
List of Price Assignments zone	List of Price Assignments on page 1006

Modifying a Price Assignment for a Price List

Procedure

To modify a price assignment for a price list:

1. Click the **Menu** link in the **Application** toolbar.
   A list appears.
2. From the **Main** menu, select **Approval Workflow** and then click **Modify Price Assignment**.
   The **Modify Price Assignment** screen appears.
3. In the **Search** zone, enter the search criteria, such as the description of the price list.

> **Note:** ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.

4. Click **Search**.
   A list of price lists that meet the search criteria appears in the **Search Results** section.
5. Click the **Broadcast** (ᯤ) icon corresponding to the price list whose price assignment requests you want to *m*odify.
   The **List of Price Assignments** zone appears.
6. Click the **Modify** link in the **Modify** column corresponding to the price assignment request that you want *m*odify.

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The **Modify/Resolve Price Assignment** screen appears where you can modify the pricing details, tiering ranges, and price assignment characteristics.

> **Note:** Only those users who have access to the application services for each business object within the approval workflow group will be able to modify the details of the price assignment request.

7. Make the required changes.
8. Click **Save**.
   The price assignment for a price list is updated.

Related Topics

For more information on...	See...
Modify Price Assignment screen	Modify Price Assignment on page 1003
Search zone	Search on page 1003
List of Price Assignments zone	List of Price Assignments on page 1006

Withdrawing a Price Assignment for an Account

Procedure

To withdraw a price assignment for an account:

1. Click the **Menu** link in the **Application** toolbar.
   A list appears.
2. Do the following:

If you want to...	Then...
Withdraw a price assignment request when it is in the Pending Approval status	From the **Main** menu, select **Approval Workflow** and then click **Modify Price Assignment**. The **Modify Price Assignment** screen appears.
Withdraw a price assignment request when it has been rejected by an approver at any level in the hierarchy	From the **Main** menu, select **Approval Workflow** and then click **Resolve Price Assignment**. The **Resolve Price Assignment** screen appears.

3. In the **Search** zone, enter the search criteria, such as the division to which the account belongs, account ID, or *a*ccount identifier.

> **Note:** ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.

4. Click **Search**.
   A list of accounts that meet the search criteria appears in the **Search Results** section.
5. Click the **Broadcast** (📡) icon corresponding to the account whose price assignment requests you want to *w*ithdraw.
   The **List of Price Assignments** zone appears.

> **Note:** The system provides you with a facility to view the log of a price assignment request from the **Modify Price Assignment** and **Resolve Price Assignment** screens before withdrawing a request.

6. Click the **Withdraw** link in the **Withdraw** column corresponding to the price assignment request that you want *t*o withdraw.
   A message box appears confirming whether you want to delete the price assignment request.

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7. Click **OK**.
   You will no longer be able to view this request in your workflow.

Related Topics

For more information on...	See...
Modify Price Assignment screen	Modify Price Assignment on page 1003
Resolve Price Assignment screen	Resolve Price Assignment on page 1013

Withdrawing a Price Assignment for a Person

Procedure

To withdraw a price assignment for a person:

1. Click the **Menu** link in the **Application** toolbar.
   A list appears.
2. Select the **Main** menu and do the following:

If you want to...	Then...
Withdraw a price assignment request when it is in the Pending Approval status	From the **Main** menu, select **Approval Workflow** and then click **Modify Price Assignment**. The **Modify Price Assignment** screen appears.
Withdraw a price assignment request when it has been rejected by an approver at any level in the hierarchy	From the **Main** menu, select **Approval Workflow** and then click **Resolve Price Assignment**. The **Resolve Price Assignment** screen appears.

3. In the **Search** zone, enter the search criteria, such as the division to which the *p*erson belongs or the person identification type and value.

> **Note:** ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.

4. Click **Search**.
   A list of persons that meet the search criteria appears in the **Search Results** section.
5. Click the **Broadcast** (ᯤ) icon corresponding to the person whose price assignment requests you want to *w*ithdraw.
   The **List of Price Assignments** zone appears.

> **Note:** The system provides you with a facility to view the log of a price assignment request from the **Modify Price Assignment** and **Resolve Price Assignment** screens before withdrawing a request.

6. Click the **Withdraw** link in the **Withdraw** column corresponding to the price assignment request that you want *t*o withdraw.
   A message box appears confirming whether you want to delete the price assignment request.
7. Click **OK**.
   You will no longer be able to view this request in your workflow.

Related Topics

For more information on...	See...
Modify Price Assignment screen	Modify Price Assignment on page 1003

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For more information on...	See...
Resolve Price Assignment screen	Resolve Price Assignment on page 1013

Withdrawing a Price Assignment for a Price List

Procedure

To withdraw a price assignment for a price list:

1. Click the **Menu** link in the **Application** toolbar.
   A list appears.
2. Do the following:

If you want to...	Then...
Withdraw a price assignment request when it is in the Pending Approval status	From the **Main** menu, select **Approval Workflow** and then click **Modify Price Assignment**. The **Modify Price Assignment** screen appears.
Withdraw a price assignment request when it has been rejected by an approver at any level in the hierarchy	From the **Main** menu, select **Approval Workflow** and then click **Resolve Price Assignment**. The **Resolve Price Assignment** screen appears.

3. In the **Search** zone, enter the search criteria, such as the description of the price list.

> **Note:** ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.

4. Click **Search**.
   A list of price lists that meet the search criteria appears in the **Search Results** section.
5. Click the **Broadcast** (📡) icon corresponding to the price list whose price assignment requests you want to *w*ithdraw.
   The **List of Price Assignments** zone appears.

> **Note:** The system provides you with a facility to view the log of a price assignment request from the **Modify Price Assignment** and **Resolve Price Assignment** screens before withdrawing a request.

6. Click the **Withdraw** link in the **Withdraw** column corresponding to the price assignment request that you want *t*o withdraw.
   A message box appears confirming whether you want to delete the price assignment request.
7. Click **OK**.
   You will no longer be able to view this request in your workflow.

Related Topics

For more information on...	See...
Modify Price Assignment screen	Modify Price Assignment on page 1003
Resolve Price Assignment screen	Resolve Price Assignment on page 1013

Viewing the Log of an Approval Transaction

Procedure

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To view the log of an approval transaction:

1. Click the **Menu** link in the **Application** toolbar.
   A list appears.
2. From the **Main** menu, select **Approval Workflow** and then click **Modify Price Assignment**.
   The **Modify Price Assignment** screen appears.
3. In the **Search** zone, enter the search criteria, such as the description of the price list.

> **Note:** ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.

4. Click **Search**.
   A list of price lists that meet the search criteria appears in the **Search Results** section.
5. Click the **Broadcast** ( ) icon corresponding to the price list whose price assignment requests you want *t*o modify.
   The **List of Price Assignments** zone appears.
6. Click on **Log** link in the **View** column.
   The **Approval Transaction Log** screen appears.
7. View the log of an approval transaction, as required.

Related Topics

For more information on...	See...
Modify Price Assignment screen	Modify Price Assignment on page 1003
Search zone	Search on page 1003
Approval Transaction Log zone	Approval Transaction Log on page 979

Resolve Price Assignment

If an approver at any level in the hierarchy rejects a price assignment request, a notification is sent to the submitter who has made the changes. The submitter then makes the required corrections based on the approver's comments, and resubmits the changes for approval. In this case, the approval process starts once again from the beginning, and not from the level at which the request was rejected.

The **Resolve Price Assignment** screen allows you to resolve or withdraw a price assignment request. It consists of the following zones:

- Search on page 1013
- List of Price Assignments on page 1016

Search

The **Search** zone allows you to search for the price assignment requests rejected by approvers and pending for you to resolve. It contains the following two sections:

- **Search Criteria** - The **Search Criteria** section contains the following fields:

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Field Name	Field Description	Mandatory (Yes or No)
Search By	Used to indicate whether you want to search price assignments using various details. The valid values are: • Person • Account • Price List • Submitter ID • Approver Transaction ID **Note:** By default, the **Person** option is selected.	Yes
Division	Used to search price assignments which belong to a particular division. **Note:** You can only view those divisions to which you have access in the **Division** list.	No
Person Identifier Type	Used to specify the identifier type based on which you want to search for price assignment requests of a person. **Note:** This field appears when you select the **Person** option from the **Search By** list.	Yes (Conditional) **Note:** If you enter the person identifier as a search criteria, you have to select the person identifier type.
Person Identifier	Used to specify the ID linked to the person. **Note:** This field appears when you select the **Person** option from the **Search By** list.	Yes (Conditional) **Note:** If you specify the person identifier type as a search criteria, you have to enter the person identifier.
Account ID	Used to search for price assignment requests created for an account. **Note:** This field appears when you select the **Account** option from the **Search By** list.	No
Account Identifier Type	Used to specify the account identifier type of the account whose price assignment requests you want to search. **Note:** This field appears when you select the **Account** option from the **Search By** list.	Yes (Conditional) **Note:** If you enter the account identifier as a search criteria, you have to select the account identifier type.
Account Identifier	Used to specify the value of the account identifier type. **Note:** This field appears when you select the **Account** option from the **Search By** list.	Yes (Conditional) **Note:** If you specify the account identifier type as a search criteria, you have to enter the account identifier.
Price List Description	Used to search for price assignment requests created for a price list.	No

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Field Name	Field Description	Mandatory (Yes or No)
	Note: This field appears when you select the **Price List** option from the **Search By** list.	
Submitter ID	Used to search for price assignment requests that are created by a particular submitter. **Note:** This field appears when you select the **Submitter ID** option from the **Search By** list.	No
Approval Transaction ID	Used to search the price assignment request using the approval transaction ID. **Note:** The approval transaction ID is generated automatically when the price assignment request is created. This field appears when you select the **Approval Transaction ID** option from the **Search By** list.	No

Note: You must specify at least one search criterion while searching for a price assignments.

- **Search Results** - On clicking the **Search** button, the search results appear based on the specified search criteria. The **Search Results** section contains the following columns:

Column Name	Column Description
Person Identifier	Displays the ID linked to the person. **Note:** This column appears when you are searching for price assignment requests of a person.
Person Name	Displays the name of the person. **Note:** This column appears when you are searching for price assignment requests of a person.
Division	Displays the division to which the account, person, or price list belongs.
Account Information	Displays information about the account. In addition, this column has a context menu which helps in navigating to other screens in the application. **Note:** This column appears when you are searching for price assignment requests of an account. It has a link. On clicking the link, the **Account** screen appears where you can view the details of the respective account.
Account Identifier Type	Displays the account identifier type. **Note:** This column appears when you are searching for price assignment requests of an account.
Account Identifier	Displays the value of the account identifier type.

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Column Name	Column Description
	Note: This column appears when you are searching for price assignment requests of an account.
Price List ID	Displays the price list ID.
	Note: qThis column appears only when you are searching for price assignment requests of a price list.
Price List Description	Displays the description of the price list.
	Note: This column appears when you are searching for price assignment requests of a price list.
Owner ID	Displays the ID of the person for whose account the approval workflow request is created.
Approval Transaction ID	Displays the approval transaction ID.
	Note: The approval transaction ID is generated automatically when the price assignment request is created.
Person Identifier Type	Displays the person identifier type.
	Note: This column appears when you are searching for price assignment requests of a person.

On clicking the **Broadcast** (📡) icon corresponding to the account, person, or price list, the **List of Price Assignments** zone appears.

Related Topics

For more information on...	See...
How to resolve a price assignment for an account	Resolving a Price Assignment for an Account on page 1018
How to resolve a price assignment for a person	Resolving a Price Assignment for a Person on page 1018
How to resolve a price assignment for a price list	Resolving a Price Assignment for a Price List on page 1019
How to withdraw a price assignment for an account	Withdrawing a Price Assignment for an Account on page 1020
How to withdraw a price assignment for a person	Withdrawing a Price Assignment for a Person on page 1021
How to withdraw a price assignment for a price list	Withdrawing a Price Assignment for a Price List on page 1022

List of Price Assignments

The **List of Price Assignments** zone lists price assignment requests specific to an account, a person, or a price list. It contains the following columns:

Column Name	Column Description
Approval Transaction ID	Displays the approval transaction ID.

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Column Name	Column Description
	Note: The approval transaction ID is generated automatically when the price assignment request is created.
Submitter Name	Indicates the submitter who has created the price assignment request.
Action	Indicates the type of action, such as **Add**, **Update (UPD)**, or **Delete (DEL)** performed by the submitter during price assignment.
Submitted On	Displays the date and time when the price assignment request was created by the submitter.
To Do Type	Displays the type of To Do (notification) received for the price assignment request.
Price Item	Displays the price item code.
Description	Displays the description of the product.
Pricing Currency	Indicates the currency in which the product pricing is defined.
Start Date	Displays the date from when the product pricing is effective.
End Date	Displays the date till when the product pricing is effective.
Approver Name	Indicates the approver who has rejected the price assignment request.
Rejected On	Displays the date and time when the price assignment request was rejected by an approver.
Reject Reason	Indicates the reason why the price assignment request was rejected.
Rejection Comments	Displays the additional details entered by an approver on rejecting the price assignment request.
Approval Transaction Information	Displays information about the approval transaction.
	Note: This information string is generated using the **C1-APPTXNINF** algorithm.
Resolve	On clicking the **Resolve** link, you can modify the details of the price assignment request, and resubmit it for approval. On resubmitting, the approval workflow process starts once again from the first level in the hierarchy.
Withdraw	On clicking the **Withdraw** link, you can withdraw the price assignment request. Once you withdraw the request, no further action will be taken on the request.
View	On clicking the **Log** link, you can view the log of the price assignment request from the **Resolve Price Assignment** screen before resolving or withdrawing a request.

By default, the **List of Price Assignments** zone does not appear in the **Resolve Price Assignment** screen. It appears when you click the **Broadcast** (📡) icon corresponding to the account, person, or price list in the **Search** zone.

Related Topics

For more information on...	See...
How to resolve a price assignment for an account	Resolving a Price Assignment for an Account on page 1018
How to resolve a price assignment for a person	Resolving a Price Assignment for a Person on page 1018
How to resolve a price assignment for a price list	Resolving a Price Assignment for a Price List on page 1019
How to withdraw a price assignment for an account	Withdrawing a Price Assignment for an Account on page 1020

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For more information on...	See...
How to withdraw a price assignment for a person	Withdrawing a Price Assignment for a Person on page 1021
How to withdraw a price assignment for a price list	Withdrawing a Price Assignment for a Price List on page 1022

Resolving a Price Assignment for an Account

Procedure

To resolve a price assignment for an account:

1. Click the **Menu** link in the **Application** toolbar.
   A list appears.
2. From the **Main** menu, select **Approval Workflow** and then click **Resolve Price Assignment**.
   The **Resolve Price Assignment** screen appears.
3. In the **Search** zone, enter the search criteria, such as the division to which the account belongs, account ID, or *a*ccount identifier.

   Note: ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.
4. Click **Search**.
   A list of accounts that meet the search criteria appears in the **Search Results** section.
5. Click the **Broadcast** (📡) icon corresponding to the account whose price assignment requests you want to *r*esolve.
   The **List of Price Assignments** zone appears.
6. Click the **Resolve** link in the **Resolve** column corresponding to the price assignment request that you want to *r*esolve.
   The **Modify/Resolve Price Assignment** screen appears where you can modify the pricing details, tiering ranges, and price assignment characteristics.

   Note: Only those users who have access to the application services for each business object within the approval workflow group will be able to resolve the request and resubmit it for approval.
7. Make the required changes.
8. Click **Save**.
   The price assignment is updated and resubmitted for approval.

Related Topics

For more information on...	See...
Resolve Price Assignment screen	Resolve Price Assignment on page 1013
Search zone	Search on page 1013
List of Price Assignments zone	List of Price Assignments on page 1016

Resolving a Price Assignment for a Person

Procedure

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To resolve a price assignment for a person:

1. Click the **Menu** link in the **Application** toolbar.
   A list appears.
2. From the **Main** menu, select **Approval Workflow** and then click **Resolve Price Assignment**.
   The **Resolve Price Assignment** screen appears.
3. In the **Search** zone, enter the search criteria, such as the division to which the person belongs or the *p*erson identification type and value.

> **Note:** ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.

4. Click **Search**.
   A list of persons that meet the search criteria appears in the **Search Results** section.
5. Click the **Broadcast** ( ) icon corresponding to the person whose price assignment requests you want to *r*esolve.
   The **List of Price Assignments** zone appears.
6. Click the **Resolve** link in the **Resolve** column corresponding to the price assignment request that you want to *r*esolve.
   A screen appears where you can modify the pricing details, tiering ranges, and price assignment characteristics.

> **Note:** Only those users who have access to the application services for each business object within the approval workflow group will be able to resolve the request, and resubmit it for approval.

7. Make the required changes.
8. Click **Save**.
   The price assignment is updated and resubmitted for approval.

Related Topics

For more information on...	See...
Resolve Price Assignment screen	Resolve Price Assignment on page 1013
Search zone	Search on page 1013
List of Price Assignments zone	List of Price Assignments on page 1016

Resolving a Price Assignment for a Price List

Procedure

To resolve a price assignment for a price list:

1. Click the **Menu** link in the **Application** toolbar.
   A list appears.
2. From the **Main** menu, select **Approval Workflow** and then click **Resolve Price Assignment**.
   The **Resolve Price Assignment** screen appears.
3. In the **Search** zone, enter the search criteria, such as the description of the price list.

> **Note:** ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.

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4. Click **Search**.
   A list of price lists that meet the search criteria appears in the **Search Results** section.
5. Click the **Broadcast** (ᯤ) icon corresponding to the price list whose price assignment requests you want to *r*esolve.
   The **List of Price Assignments** zone appears.
6. Click the **Resolve** link in the **Resolve** column corresponding to the price assignment request that you want to *r*esolve.
   The **Modify/Resolve Price Assignment** screen appears where you can modify the pricing details, tiering ranges, and price assignment characteristics.

> **Note:** Only those users who have access to the application services for each business object within the approval workflow group will be able to resolve the request, and resubmit it for approval.

7. Make the required changes.
8. Click **Save**.
   The price assignment is updated and resubmitted for approval.

Related Topics

For more information on...	See...
Resolve Price Assignment screen	Resolve Price Assignment on page 1013
Search zone	Search on page 1013
List of Price Assignments zone	List of Price Assignments on page 1016

Withdrawing a Price Assignment for an Account

Procedure

To withdraw a price assignment for an account:

1. Click the **Menu** link in the **Application** toolbar.
   A list appears.
2. Do the following:

If you want to...	Then...
Withdraw a price assignment request when it is in the Pending Approval status	From the **Main** menu, select **Approval Workflow** and then click **Modify Price Assignment**. The **Modify Price Assignment** screen appears.
Withdraw a price assignment request when it has been rejected by an approver at any level in the hierarchy	From the **Main** menu, select **Approval Workflow** and then click **Resolve Price Assignment**. The **Resolve Price Assignment** screen appears.

3. In the **Search** zone, enter the search criteria, such as the division to which the account belongs, account ID, or *a*ccount identifier.

> **Note:** ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.

4. Click **Search**.
   A list of accounts that meet the search criteria appears in the **Search Results** section.
5. Click the **Broadcast** (ᯤ) icon corresponding to the account whose price assignment requests you want to *w*ithdraw.
   The **List of Price Assignments** zone appears.

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> **Note:** The system provides you with a facility to view the log of a price assignment request from the **Modify Price Assignment** and **Resolve Price Assignment** screens before withdrawing a request.

6. Click the **Withdraw** link in the **Withdraw** column corresponding to the price assignment request that you *w*ant to withdraw.
   A message box appears confirming whether you want to delete the price assignment request.
7. Click **OK**.
   You will no longer be able to view this request in your workflow.

Related Topics

For more information on...	See...
Modify Price Assignment screen	Modify Price Assignment on page 1003
Resolve Price Assignment screen	Resolve Price Assignment on page 1013

Withdrawing a Price Assignment for a Person

Procedure

To withdraw a price assignment for a person:

1. Click the **Menu** link in the **Application** toolbar.
   A list appears.
2. Select the **Main** menu and do the following:

If you want to...	Then...
Withdraw a price assignment request when it is in the Pending Approval status	From the **Main** menu, select **Approval Workflow** and then click **Modify Price Assignment**. The **Modify Price Assignment** screen appears.
Withdraw a price assignment request when it has been rejected by an approver at any level in the hierarchy	From the **Main** menu, select **Approval Workflow** and then click **Resolve Price Assignment**. The **Resolve Price Assignment** screen appears.

3. In the **Search** zone, enter the search criteria, such as the division to which the person belongs or *t*he person identification type and value.

> **Note:** ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.

4. Click **Search**.
   A list of persons that meet the search criteria appears in the **Search Results** section.
5. Click the **Broadcast** (📡) icon corresponding to the person whose price assignment requests you want to *w*ithdraw.
   The **List of Price Assignments** zone appears.

> **Note:** The system provides you with a facility to view the log of a price assignment request from the **Modify Price Assignment** and **Resolve Price Assignment** screens before withdrawing a request.

6. Click the **Withdraw** link in the **Withdraw** column corresponding to the price assignment request that you *w*ant to withdraw.
   A message box appears confirming whether you want to delete the price assignment request.
7. Click **OK**.

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You will no longer be able to view this request in your workflow.

Related Topics

For more information on...	See...
Modify Price Assignment screen	Modify Price Assignment on page 1003
Resolve Price Assignment screen	Resolve Price Assignment on page 1013

Withdrawing a Price Assignment for a Price List

Procedure

To withdraw a price assignment for a price list:

1. Click the **Menu** link in the **Application** toolbar.
   A list appears.
2. Do the following:

If you want to...	Then...
Withdraw a price assignment request when it is in the Pending Approval status	From the **Main** menu, select **Approval Workflow** and then click **Modify Price Assignment**. The **Modify Price Assignment** screen appears.
Withdraw a price assignment request when it has been rejected by an approver at any level in the hierarchy	From the **Main** menu, select **Approval Workflow** and then click **Resolve Price Assignment**. The **Resolve Price Assignment** screen appears.

3. In the **Search** zone, enter the search criteria, such as the description of the price list.

> **Note:** ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.

4. Click **Search**.
   A list of price lists that meet the search criteria appears in the **Search Results** section.
5. Click the **Broadcast** ( ) icon corresponding to the price list whose price assignment requests you want to *w*ithdraw.
   The **List of Price Assignments** zone appears.

> **Note:** The system provides you with a facility to view the log of a price assignment request from the **Modify Price Assignment** and **Resolve Price Assignment** screens before withdrawing a request.

6. Click the **Withdraw** link in the **Withdraw** column corresponding to the price assignment request that you *w*ant to withdraw.
   A message box appears confirming whether you want to delete the price assignment request.
7. Click **OK**.
   You will no longer be able to view this request in your workflow.

Related Topics

For more information on...	See...
Modify Price Assignment screen	Modify Price Assignment on page 1003
Resolve Price Assignment screen	Resolve Price Assignment on page 1013

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Viewing the Log of an Approval Transaction

Procedure

To view the log of an approval transaction:

1. Click the **Menu** link in the **Application** toolbar.
   A list appears.
2. From the **Main** menu, select **Approval Workflow** and then click **Modify Price Assignment**.
   The **Resolve Price Assignment** screen appears.
3. In the **Search** zone, enter the search criteria, such as the description of the price list.

> **Note:** ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.

4. Click **Search**.
   A list of price lists that meet the search criteria appears in the **Search Results** section.
5. Click the **Broadcast** (ᯤ) icon corresponding to the price list whose price assignment requests you want to *m*odify.
   The **List of Price Assignments** zone appears.
6. Click on **Log** link in the **View** column.
   The **Approval Transaction Log** screen appears.
7. You can view the log of an approval transaction, as required.

Related Topics

For more information on...	See...
Approval Transaction screen	Approval Transaction on page 975
Search zone	Search on page 1013
Approval Transaction Log zone	Approval Transaction Log on page 979

Approval Workflow Group (Used for Searching)

The **Approval Workflow Group** screen allows you to search for approval workflow group using various search criteria. Through this screen, you can navigate to the following screen:

- Approval Workflow Group (Used for Viewing) on page 1031

This screen consists of the following zone:

- Search Approval Workflow Group on page 1024

For more information on...	See...
How to search an approval workflow group	Searching for an Approval Workflow Group on page 1024
How to view the details of approval workflow group	Viewing the Approval Workflow Group Details on page 1025

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Search Approval Workflow Group

The **Search Approval Workflow Group** zone allows you to search for an approval workflow group using various search criteria. It contains the following sections:

- **Search Criteria** - The **Search Criteria** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Approval Workflow Group	Used to search a particular approval workflow group.	No
Description	Used to search approval workflow groups with a particular description.	No

- **Search Results** - On clicking the **Search** button, the search results appear based on the specified search criteria. The **Search Results** section contains the following columns:

Column Name	Column Description
Approval Workflow Group	Displays the approval workflow group.
Description	Displays the description of the approval workflow group.
	Note: It has a link. On clicking the link, the **Approval Workflow Group** screen appears where you can view the details of the respective approval workflow group.

Note: You must specify at least one search criterion while searching for an Approval Workflow Group.

Related Topics

For more information on...	See...
How to search for an approval workflow group	Searching for an Approval Workflow Group on page 1024
How to view the details of an approval workflow group	Viewing the Approval Workflow Group Details on page 1025

Searching for an Approval Workflow Group

Procedure

To search for an approval workflow group:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **A** and then click **Approval Workflow Group**.
   The **Approval Workflow Group** screen appears.
3. Enter the search criteria in the **Search Approval Workflow Group** zone.

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> **Note:** ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.

4. Click **Search**.
   A list of approval workflow groups that meet the search criteria appear in the **Search Results** section.

Related Topics

For more information on...	See...
Search Approval Workflow Group screen	Approval Workflow Group (Used for Searching) on page 1023
Search Approval Workflow Group zone	Search Approval Workflow Group on page 1024

Viewing the Approval Workflow Group Details

Procedure

To view the details of an approval workflow group:

1. Search for the approval workflow group in the **Approval Workflow Group** screen.
2. In the **Search Results** section, click the link in the **Description** column corresponding to the approval workflow group whose details you want to view.

   The **Approval Workflow Group** screen appears. It consists of the **Main** tab with the following zone:

   - Approval Workflow Group on page 1032
3. View the details of the approval workflow group in the **Approval Workflow Group** zone.

Related Topics

For more information on...	See...
How to search for an approval workflow group	Searching for an Approval Workflow Group on page 1024
Approval Workflow Group screen	Approval Workflow Group (Used for Searching) on page 1023
Approval Workflow Group zone	Search Approval Workflow Group on page 1024

Defining an Approval Workflow Group

Prerequisites

To define an approval workflow group, you should have:

- Input and Display UI maps created in the application in case you want to use custom UI maps.
- Dependency, Approval, and Approval Post Processing algorithms defined in the application in case you want to use any of them.

> **Note:** Before you define an approval workflow group for the User BO, you need to attach the **C1-APPTXNBAS** algorithm on the **Audit** algorithm spot of the business object belonging to the USER-SC MO, and not the USER MO.

Procedure

To define an approval workflow group:

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1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, Select **A** and then click **Approval Workflow Group**.
   The **Approval Workflow Group** screen appears.
3. Click the **Add** button in the **Page Title** area of **Approval Workflow Group** screen.
   The **Approval Workflow Group** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details about the approval workflow group.
   - **Business Objects and Group BO Relation** - Used to add business objects and define group BO Relation for the approval workflow group.

   The **Main** section contains the following:

Field Name	Field Description	Mandatory (Yes or No)
Approval Transaction Type	Used to indicate the transaction type to which the approval workflow group belongs.	Yes
Approval Workflow Group	Used to specify the approval workflow group.	Yes
Description	Used to specify the approval workflow group with a particular description.	Yes
Display UI Map	Used to specify the UI map that you want to use for viewing data of the business objects within the approval workflow group. **Note:** You can search for a UI map, code, and an algorithm by clicking the **Search** icon (🔍) corresponding to the Display UI Map field. **Note:** If you clear the **Display UI Map** field, you need to either manually specify the UI map or automatically regenerate the UI map by clicking the **Regenerate UI Maps** icon corresponding to the group in the **Approval Workflow Settings** screen.	No
Input UI Map	Used to specify the UI map that you want to use for modifying data of the business objects within the approval workflow group. **Note:** You can search for a UI map, code, and an algorithm by clicking the **Search** icon (🔍) corresponding to the Input UI Map field. **Note:** If you clear the **Input UI Map** field, you need to either manually specify the UI map or automatically regenerate the UI map by clicking the **Regenerate UI Maps** icon corresponding to the group in the **Approval Workflow Settings** screen.	No
Dependency Algorithm	Used to specify the algorithm that will be triggered before creating the approval workflow group. **Note:** You can search for a Input UI map, code, and an algorithm by clicking the **Search** icon (🔍) corresponding to the Dependency Algorithm field.	No

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Field Name	Field Description	Mandatory (Yes or No)
	Note: This algorithm can be used to check all prerequisites before creating the approval workflow group.	
Approval Algorithm	Used to specify the algorithm that will be triggered after the approval workflow group is approved by the approver at the last level in the hierarchy. The following approval algorithms are shipped with ORMB: • **C1-APPPROD** - This approval algorithm is used for the C1PRODUCT group, which is shipped with ORMB. • **C1-APPPL** - This approval algorithm is used for the C1PRICELST group, which is shipped with ORMB. • **C1-APPPASG** - This approval algorithm is used for the C1PRICEASG group, which is shipped with ORMB. • **C1-APPALG** - This is a standard approval algorithm that you can use for approval workflow groups where custom logic is not required. You can also create your own approval algorithms for custom UIs. **Note:** You can search for a Input UI map, code, and an algorithm by clicking the **Search** icon (🔍) corresponding to the Approval Algorithm field.	No
Approval Post Processing Algorithm	Used to specify the algorithm that will be triggered after the changes (which are approved by all approvers' in the hierarchy) are committed to the database. **Note:** You can search for a Input UI map, code, and an algorithm by clicking the **Search** icon (🔍) corresponding to the Approval Post Processing Algorithm field.	No
Transaction Creation Algorithm	Used to specify the algorithm that will create approval workflow group. The following transaction creation algorithms are shipped with ORMB: • **C1-APPASGCR** - Used to create approval workflow group for price assignment. • **C1-AXPROD** - Used to create approval workflow group for price item. • **C1-AXUSR** - Used to create approval workflow group for user. • **C1-IGCREATE** - Used to create approval workflow group for invoicing group. • **C1-AXCREATE** - This is a standard transaction creation algorithm that you can use to create approval workflow group for most of the base objects. You can also create your own transaction creation algorithms for custom UIs. In case of the base UIs, this algorithm is only used while modifying or resolving a group. The initial approval	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	transaction creation for base UIs takes place through the Audit algorithm attached on the business object. **Note:** You can search for a Input UI map, code, and an algorithm by clicking the **Search** icon (🔍) corresponding to the Transaction Creation Algorithm field.	
Data Retrieval Algorithm	Used to specify the algorithm that will be triggered to retrieve the original data of the business objects within the approval workflow group. This will help an approver to compare the original and new data in case where the submitter action is Update (UPD). The following data retrieval algorithms are shipped with ORMB: • **C1-APPIGDR** - Used to retrieve data for invoicing group. • **C1-AXPRICEOV** - Used to retrieve data for price assignment. • **C1_APPDATA** - This is a standard data retrieval algorithm that you can use to retrieve data for most of the base objects. You can also create your own data retrieval algorithms for custom UIs. **Note:** You can search for a Input UI map, code, and an algorithm by clicking the **Search** icon (🔍) corresponding to the Data Retrieval Algorithm field.	Yes
Information Algorithm	Used to specify the algorithm information. **Note:** You can search for a Input UI map, code, and an algorithm by clicking the **Search** icon (🔍) corresponding to the Approval Post Processing Algorithm field.	No
Compare Map	Used to specify the customized Display UI map that you want to use for the approval workflow group. It overrides the UI map specified in the **Display UI Map** field. **Note:** You can search for a Input UI map, code, and an algorithm by clicking the **Search** icon (🔍) corresponding to the Approval Post Processing Algorithm field.	No
Input Script	Used to specify the customized Input UI map that you want to use for the approval workflow group. It overrides the UI map specified in the **Input UI Map** field. **Note:** You can search for a Input UI map, code, and an algorithm by clicking the **Search** icon (🔍) corresponding to the Approval Post Processing Algorithm field.	No

4. Enter the required details.
5. Add business objects and group BO relation with the approval workflow group, if required.
6. Click **Save**.
   The approval workflow group is defined.

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Related Topics

For more information on...	See...
Approval Workflow Group screen	Approval Workflow Group (Used for Viewing) on page 1031
Approval Workflow Group zone	Approval Workflow Group on page 1032
How to add business objects and group BO relation	Adding a Business Object on page 1029

Adding a Business Object

Prerequisites

To add a business object in the approval workflow group, you should have:

- Business object and approval workflow group created in the application.

Procedure

To add a business object in the approval workflow group:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, Select **A**, and then click **Approval Workflow Group**.
   The **Approval Workflow Group** screen appears.
3. Click the **Add** button in the page-title area of the **Approval Workflow Group** screen.
   The **Approval Workflow Group** screen appears. It contains following sections:
   - **Main** - Used to specify basic details of the approval workflow group.
   - **Business Objects and Group BO Relation** - Used to specify the fields that allow to define business and parent objects and link them with the approval workflow group.

   The **Business Objects and Group BO Relation** section contains following fields:

Field Name	Field Description	Mandatory (Yes or No)
Business Object	Used to specify the Business Object Code that you want to include in the Approval Workflow Group.	Yes
Reference ID 1	Used to specify the XPATH key of the field in the business object that you want to display in the approval transaction information string.	Yes
Reference ID 2	Used to specify the XPATH key of the field in the business object that you want to display in the approval transaction information string.	Yes
Reference ID 3	Used to specify the XPATH key of the field in the business object that you want to display in the approval transaction information string.	Yes
Reference ID 4	Used to specify the XPATH key of the field in the business object that you want to display in the approval transaction information string.	Yes
Reference Foreign Key 1	Used to specify the XPATH key of the field in the business object that you want to use for validating whether duplicate approval transaction exists in the system.	No

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Field Name	Field Description	Mandatory (Yes or No)
Reference Foreign Key 2	Used to specify the XPATH key of the field in the business object that you want to use for validating whether duplicate approval transaction exists in the system.	No
Reference Foreign Key 3	Used to specify the XPATH key of the field in the business object that you want to use for validating whether duplicate approval transaction exists in the system.	No
Reference Foreign Key 4	Used to specify the XPATH key of the field in the business object that you want to use for validating whether duplicate approval transaction exists in the system.	No
Reference Foreign Key 5	Used to specify the XPATH key of the field in the business object that you want to use for validating whether duplicate approval transaction exists in the system.	No
Reference Foreign Key 6	Used to specify the XPATH key of the field in the business object that you want to use for validating whether duplicate approval transaction exists in the system.	No
List	Used to indicate whether the group contains one or multiple instance of the business object. For example, if you want to create a group that contains multiple account objects, you need to set this flag for the Account BO to True. If you want to create a group that contains single instance of the business object, you must set this flag for the business object to False.	Yes
Parent Business Object	Used to specify the parent business object. This should be one of the business objects within the group.	No
From Key	Used to specify the XPATH key of the field or list of fields in the parent business object.	No
To Key	Used to specify the XPATH key of the field or list of fields in the current business object.	No

Note: You can search for a business object and parent business object, by clicking the **Search** (🔍) icon placed corresponding to the **Business Object** field.

4. If you want to define more than one business and parent business object for the approval workflow group, click the **Add** (+) icon placed corresponding to the field.
5. Enter the required details in **Main** and **Business Objects and Group BO Relation** sections.
6. Click **Save**
   The business object is added in the approval workflow group.

Note: When you add business objects in an approval workflow group, you need to regenerate the Input and Display UI maps by clicking the **Regenerate UI Maps** (🔄) icon corresponding to the group in the **Approval Workflow Settings** screen. You must do this when you are using automatically generated UI maps, and not otherwise.

Related Topics

For more information on...	See...
Approval Workflow Group screen	Approval Workflow Group (Used for Viewing) on page 1031
Approval Workflow Group zone	Approval Workflow Group on page 1032

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Defining a Group BO Relation

Prerequisites

To define a relationship between business object in the approval workflow group, you should have:

- Business objects added in the approval workflow group.

Procedure

To define a relationship between business objects in the approval workflow group:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, Select **A** and then click **Approval Workflow Group**.
   The **Approval Workflow Group** screen appears.
3. Search for an approval workflow group in the **Approval Workflow Group** screen.
4. In the **Search Results** section, click the link in the **Description** column corresponding to the approval workflow group.
5. The **Approval Workflow Group** screen appears. It contains following sections:
   - **Main** - Used to specify basic details of the approval workflow group.
   - **Business Objects and Group BO Relation** - Used to specify the fields that allow to define business and parent objects, and link them with the approval workflow group.
6. Define and edit the approval workflow group details from the **Main** section, if required.
7. If you only want to define a business object, enter the required details in the **Business Objects and Group BO Relation** section.
8. If you want to define a group BO relation with the business object, enter the required details in the following fields.
   a) **Parent Business Object**
   b) **From Key**
   c) **To Key**

   Note: If you want to define more than one business or parent object, click the **Add** (+) icon and then repeat step 2. However, if you want to remove a business or parent object, click the **Delete** (🗑) icon corresponding to the business or parent object field.
9. Click **Save**.
   The business object is defined, and its relationship with the parent object is also defined in the approval workflow group.

Related Topics

For more information on...	See...
How to define an approval workflow group	Defining an Approval Workflow Group on page 1025
How to define an approval workflow business object	Adding a Business Object on page 1029
How to define an approval workflow group BO object	Defining a Group BO Relation on page 1031

Approval Workflow Group (Used for Viewing)

Once you define an approval workflow group, the **Approval Workflow Group** screen allows you to:

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- Edit the details of an approval workflow group
- Edit the details of business objects and group business object relation
- Delete an approval workflow group
- Delete a business object and a group business object relation
- View the details of an approval workflow group

This screen consists of the following zone:

- Approval Workflow Group on page 1032

Approval Workflow Group

The **Approval Workflow Group** zone displays the details of the approval workflow group. It contains the following sections:

- **Main** - Displays basic information about the approval workflow group. It contains the following fields:

Field Name	Field Description
Approval Workflow Group	Displays the name of the approval workflow group.
Description	Displays the description of the approval workflow group.
Display UI Map	Indicates the UI map that will be used for viewing data of the business objects within the approval workflow group. **Note:** It has a link. On clicking the link, the **UI Map** screen appears where you can view the details of the respective UI Map.
Input UI Map	Indicates the UI map that will be used for modifying data of the business objects within the approval workflow group. **Note:** It has a link. On clicking the link, the **UI Map** screen appears where you can view the details of the respective UI Map.
Dependency Algorithm	Indicates the algorithm that will be triggered before creating the approval workflow request. **Note:** This algorithm can be used to check all prerequisites before creating the approval workflow request.
Approval Algorithm	Indicates the algorithm that will be triggered after the approval workflow request is approved by the approver at the last level in the hierarchy.
Approval Post Processing Algorithm	Indicates the algorithm that will be triggered after the changes (which are approved by all approvers in the hierarchy) are committed to the database.
Transaction Creation Algorithm	Indicates the algorithm that will create approval workflow requests. **Note:** It has a link. On clicking the link, the **Algorithm** screen appears where you can view the details of the respective algorithm.
Data Retrieval Algorithm	Indicates the algorithm that will be triggered to retrieve the original data of the business objects within the approval workflow group. This will help an approver to compare the original and new data in case where the submitter action is Update (UPD).

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Field Name	Field Description
	Note: It has a link. On clicking the link, the **Algorithm** screen appears where you can view the details of the respective algorithm.
Information Algorithm	Indicates the Approval Transaction information from the Approval Transactions that are created for a particular entity, based on the inputs of the XPaths provided in the Reference IDs.
Compare Map	Indicates the customized Display UI map that you want to use for the approval workflow group. It overrides the UI map specified in the **Display UI Map** field.
Input Script	Indicates the customized Input UI map that you want to use for the approval workflow group. It overrides the UI map specified in the **Input UI Map** field.

- **Record Actions** - This section contains the following buttons:

Button Name	Button Description
Edit	Used to define, edit the approval workflow group. It is also used to delete the business objects and group BO relation.
Delete	Used to delete an approval workflow group.

- **Record Information** - This section contains the following fields:

Field Name	Field Description
Business Object	Indicates the business object using which the approval workflow group is created. In addition, a context menu appears corresponding to this field which helps in navigating to other screens in the application.
	Note: It has a link. On clicking the link, the **Business Object** screen appears where you can view the details of the respective business object.

- **Business Objects And Group BO Relation** - The Business Objects And Group BO Relation contains the following fields:

Field Name	Field Description
Business Object	Indicates the Business Object that you want to include in the Approval Workflow Group.
Reference ID 1	Indicates the XPATH key of the field in the business object that you want to display in the approval transaction information string.
Reference ID 2	Indicates the XPATH key of the field in the business object that you want to display in the approval transaction information string.
Reference ID 3	Indicates the XPATH key of the field in the business object that you want to display in the approval transaction information string.
Reference ID 4	Indicates the XPATH key of the field in the business object that you want to display in the approval transaction information string.
Reference Foreign Key 1	Indicates the XPATH key of the field in the business object that you want to use for validating whether duplicate approval transaction exists in the system.
Reference Foreign Key 2	Indicates the XPATH key of the field in the business object that you want to use for validating whether duplicate approval transaction exists in the system.
Reference Foreign Key 3	Indicates the XPATH key of the field in the business object that you want to use for validating whether duplicate approval transaction exists in the system.

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Field Name	Field Description
Reference Foreign Key 4	Indicates the XPATH key of the field in the business object that you want to use for validating whether duplicate approval transaction exists in the system.
Reference Foreign Key 5	Indicates the XPATH key of the field in the business object that you want to use for validating whether duplicate approval transaction exists in the system.
Reference Foreign Key 6	Indicates the XPATH key of the field in the business object that you want to use for validating whether duplicate approval transaction exists in the system.
List	Indicates whether the group contains one or multiple instance of the business object. For example, if you want to create a group that contains multiple account objects, you need to set this flag for the Account BO to True. If you want to create a group that contains single instance of the business object, you must set this flag for the business object to False.
Parent Business Object	Indicates the parent business object. This should be one of the business objects within the group.
From Key	Indicates the XPATH key of the field or list of fields in the parent business object.
To Key	Indicates the XPATH key of the field or list of fields in the current business object.

Editing an Approval Workflow Group

Procedure

To edit an approval workflow group:

1. Search for the approval workflow group in the **Approval Workflow Group**.
2. In the **Search Results** section, click the link in the **Description** column corresponding to the approval *w*orkflow group whose details you want to edit.
   The **Approval Workflow Group** screen appears.
3. Click the **Edit** button in the **Approval workflow Group** zone.
   The **Approval Workflow Group** screen appears.
4. Modify the details of the approval workflow group, if required.
5. Define, edit, or remove business objects and group BO relation from the approval workflow group, if required.
6. Click **Save**.
   The changes made to the approval workflow group are saved.

Related Topics

For more information on...	See...
How to search for an approval workflow group	Searching for an Approval Workflow Group on page 1024
How to add a business object	Adding a Business Object on page 1029
How to define a Group BO Relation	Defining a Group BO Relation on page 1031

Deleting an Approval Workflow Group

Procedure

To delete an approval workflow group:

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1. Search for the approval workflow group in the **Search Approval Workflow Group** screen.
2. In the **Search Results** section, click the link in the **Description** column corresponding to the approval *w*orkflow group that you want to delete.
3. Click the **Delete** button in the **Approval Workflow Group** zone.
   A message appears confirming whether you want to delete the approval workflow group.
4. Click **OK**.
   The approval workflow group is deleted.

Related Topics

For more information on...	See...
How to search for an approval workflow group	Searching for an Approval Workflow Group on page 1024

Editing a Business Object

Procedure

To edit a business object in the approval workflow group:

1. From the **Admin** menu, select **A** and then click **Approval Workflow Group**.
   The **Approval Workflow Group** screen appears.
2. Search for an approval workflow group in the **Search Approval Workflow Group** zone.
3. In the **Search Results** section, click the link in the **Description** column corresponding to the approval *w*orkflow group whose details you want to edit.
4. The **Approval Workflow Group** zone appears. Click the **Edit** button from **Record Action** sections.

   The **Approval Workflow Group** screen appears. It contains the following sections:

   - **Main** - Used to specify the basic details of the approval workflow group.
   - **Business Objects and Group BO Relation** - Used to specify the fields that allow to define business objects and link them with the approval workflow group

   The **Business Objects and Group BO Relation** section contains following fields:

Field Name	Field Description	Mandatory (Yes or No)
Business Object	Displays the Business Object Code that is included in the Approval Workflow Group.	Yes
Reference ID 1	Displays the XPATH key of the field in the business object that you want to use as criteria for searching approval workflow groups.	No
Reference ID 2	Displays the XPATH key of the field in the business object that you want to use as criteria for searching approval workflow groups.	No
Reference ID 3	Displays the XPATH key of the field in the business object that you want to use as criteria for searching approval workflow groups.	No
Reference ID 4	Displays the XPATH key of the field in the business object that you want to use as criteria for searching approval workflow groups.	No

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Field Name	Field Description	Mandatory (Yes or No)
Reference Foreign Key 1	Displays the XPATH key of the field in the business object that you want to use for validating whether duplicate approval transaction exists in the system.	No
Reference Foreign Key 2	Displays the XPATH key of the field in the business object that you want to use for validating whether duplicate approval transaction exists in the system.	No
Reference Foreign Key 3	Displays the XPATH key of the field in the business object that you want to use for validating whether duplicate approval transaction exists in the system.	No
Reference Foreign Key 4	Displays the XPATH key of the field in the business object that you want to use for validating whether duplicate approval transaction exists in the system.	No
Reference Foreign Key 5	Displays the XPATH key of the field in the business object that you want to use for validating whether duplicate approval transaction exists in the system.	No
Reference Foreign Key 6	Displays the XPATH key of the field in the business object that you want to use for validating whether duplicate approval transaction exists in the system.	No
List	Indicates whether the group contains one or multiple instance of the business object. For example, if you want to create a group that contains multiple account objects, you need to set this flag for the Account BO to True. If you want to create a group that contains single instance of the business object, you must set this flag for the business object to False.	Yes
Parent Business Object	Used to specify the parent business object. This should be one of the business objects within the group.	No
From Key	Display the XPATH key of the field or list of fields in the parent business object.	No
To Key	Display the XPATH key of the field or list of fields in the current business object.	No

Note: You can search for a business object or parent business object by clicking the **Search** (🔍) icon placed corresponding to the **Business Object** and **Parent Business Object** field.

5. If you want to define more than one business object or parent object for the approval workflow group, click the **Add** (+) icon placed corresponding to the field.
6. Enter the required details in **Main** and **Business Objects and Group BO Relation** sections.
7. Click **Save**.
   The changes made to the business object in approval workflow group are saved.

Note: When you change business objects in an approval workflow group, you need to regenerate the Input and Display UI maps by clicking the **Regenerate UI Maps** (🔄) icon corresponding to the group in the **Approval Workflow Settings** screen. You must do this when you are using automatically generated UI maps, and not otherwise.

Related Topics

For more information on...	See...
Approval Workflow Group screen	Approval Workflow Group (Used for Searching) on page 1023

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For more information on...	See...
Approval Workflow Group zone	Search Approval Workflow Group on page 1024
How to delete a Business Object	Deleting a Business Object on page 1037

Deleting a Business Object

Procedure

To delete a business object in the approval workflow group:

1. Search for an approval workflow group in the **Approval Workflow Group** screen.
2. In the **Search Results** section, click the link in the **Description** column corresponding to the approval *w*orkflow group.
   The **Approval Workflow Group** zone appears.
3. In the View section of **Approval Workflow Group**, click the **Edit** button.
   The **Approval Workflow Group** window appears.
4. In the **Business Objects and Group BO Relation** zone, click the **Delete** (🗑) icon corresponding to the *b*usiness object that you want to delete.
5. Click **Save**.
   The business object is deleted from the approval workflow group.

Related Topics

For more information on...	See...
Approval Workflow Group screen	Approval Workflow Group (Used for Searching) on page 1023
Approval Workflow Group zone	Search Approval Workflow Group on page 1024

Editing a Group BO Relation

Procedure

To edit the business object's relationship details in the approval workflow group:

1. If required, filter the approval workflow group in the **Approval Workflow Group** screen.
2. In the **Search Results** section, click the link in the **Description** column corresponding to the approval workflow group.

   The **Approval Workflow Group** screen appears. It contains following two sections:

   - **Main** - Displays the basic details of the approval workflow group.
   - **Business Objects and Group BO Relation** - Displays the fields that allow to define or edit business objects, and link them with the approval workflow group.
3. If required, define and edit the approval workflow group details from the **Main** section.
4. The **Business Objects and Group BO Relation** section contains following fields:

Field Name	Field Description	Mandatory (Yes or No)
Business Object	Used to specify the business object that you want to add in the approval workflow group.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
Reference ID 1	Used to indicate the XPATH key of the field that you want to concatenate in the approval transaction information string.	No
Reference ID 2	Used to indicate the XPATH key of the field that you want to concatenate in the approval transaction information string.	No
Reference ID 3	Used to indicate the XPATH key of the field that you want to concatenate in the approval transaction information string.	No
Reference ID 4	Used to indicate the XPATH key of the field that you want to concatenate in the approval transaction information string.	No
Reference Foreign Key 1	Used to indicate the XPATH key of the field that you want to use while validating whether a duplicate approval transaction does not exist in the system.	No
Reference Foreign Key 2	Used to indicate the XPATH key of the field that you want to use while validating whether a duplicate approval transaction does not exist in the system.	No
Reference Foreign Key 3	Used to indicate the XPATH key of the field that you want to use while validating whether a duplicate approval transaction does not exist in the system.	No
Reference Foreign Key 4	Used to indicate the XPATH key of the field that you want to use while validating whether a duplicate approval transaction does not exist in the system.	No
Reference Foreign Key 5	Used to indicate the XPATH key of the field that you want to use while validating whether a duplicate approval transaction does not exist in the system.	No
Reference Foreign Key 6	Used to indicate the XPATH key of the field that you want to use while validating whether a duplicate approval transaction does not exist in the system.	No
List	Indicates whether the group contains one or multiple instance of the business object. For example, if you want to create a group that contains multiple account objects, you need to set this flag for the Account BO to True. If you want to create a group that contains single instance of the business object, you must set this flag for the business object to False.	Yes
Parent Business Object	Displays the parent business object. This should be one of the business objects within the group.	No
From Key	Displays the XPATH key of the field or list of fields in the parent business object.	No
To Key	Displays the XPATH key of the field or list of fields in the current business object.	No

Note: You can search for a parent business object by clicking the **Search** (🔍) icon placed corresponding to the field. You can also define a new parent business object by clicking the **Add** (+) icon placed corresponding to the field.

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5. Modify the required details in **Business Objects and Group BO Relation** section.
6. Click **Save**.
   The changes made to business object's relationship are saved in the approval workflow group.

Related Topics

For more information on...	See...
Search Approval Workflow Group screen	Approval Workflow Group (Used for Searching) on page 1023
Search Approval Workflow Group zone	Search Approval Workflow Group on page 1024
How to edit a Business Object	Editing a Business Object on page 1035
How to edit a Group BO Relation	Editing a Group BO Relation on page 1037

Deleting a Group BO Relation

Procedure

To delete the business object's relationship details in the approval workflow group:

1. If required, filter the approval workflow group in the **Approval Workflow Group** screen.
2. In the **Search Results** section, click the link in the **Description** column corresponding *t*o the approval workflow group.
3. The **Approval Workflow Group** screen appears.
4. Click the **Edit** button in the **Record Actions** zone.
   The **Approval Workflow Group** screen appears.
5. In the **Business Objects and Group BO Relation** section, click the **Delete** (🗑) icon appearing next to the Business Object that you want to delete.
6. Click **Save**
   The business object's relationship details are deleted from the approval workflow group.

Related Topics

For more information on...	See...
Approval Workflow Group screen	Approval Workflow Group (Used for Searching) on page 1023
Approval Workflow Group zone	Search Approval Workflow Group on page 1024
How to delete a Business Object	Deleting a Business Object on page 1037
How to delete a Group BO Relation	Deleting a Group BO Relation on page 1039

Approval Workflow Chain (Used for Searching)

The **Approval Workflow Chain** screen allows you to search for approval workflow chain using various search criteria. Through this screen, you can navigate to the following screen:

- Approval Workflow Chain (Used for Viewing) on page 1043

This screen consists of the following zone:

- Search Approval Workflow Chain on page 1040

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Search Approval Workflow Chain

The **Search Approval Workflow Chain** zone allows you to search for an approval workflow chain using various search criteria. It contains the following two sections:

- **Search Criteria** - The **Search Criteria** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Approval Workflow Chain	Used to search a particular approval workflow chain.	No
Description	Used to search approval workflow chains with a particular description.	No

- **Search Results** - On clicking the **Search** button, the search results appear based on the specified search. The **Search Results** section contains the following columns:

Column Name	Column Description
Approval Workflow Chain	Displays the approval workflow chain.
Description	Displays the description of the approval workflow chain.
	Note: It has a link. On clicking the link, the **Approval Workflow Chain** screen appears where you can view the details of the respective approval workflow chain.

Note: You must specify at least one search criterion while searching for an approval workflow chain.

Related Topics

For more information on...	See...
How to search for an approval workflow chain	Searching for an Approval Workflow Chain on page 1040
How to view the details of an approval workflow chain	Viewing the Approval Workflow Chain Details on page 1041

Searching for an Approval Workflow Chain

Procedure

To search the approval workflow chain:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **A** and then click **Approval Workflow Chain**.
   The **Approval Workflow Chain** screen appears.
3. Enter the search criteria in the **Search Approval Workflow Chain** zone.

   ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.
4. Click **Search**.
   A list of approval workflow chains that meet the search criteria appears in the **Search Results** section.

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Related Topics

For more information on...	See...
Search Approval Workflow Chain zone	Search Approval Workflow Chain on page 1040

Viewing the Approval Workflow Chain Details

Procedure

To view the details of an approval workflow chain:

1. Search for the approval workflow chain in the **Approval Workflow Chain** screen.
2. In the **Search Results** section, click the link in the **Description** column corresponding to the *a*pproval workflow chain whose details you want to view.

   The **Approval Workflow Chain** screen appears. It contains the following zone:

   - Approval Workflow Chain on page 1043
3. View the details of the approval workflow chain in the **Approval Workflow Chain** zone.

Related Topics

For more information on...	See...
How to search an approval workflow chain	Searching for an Approval Workflow Chain on page 1040

Defining an Approval Workflow Chain

Prerequisites

To define an approval workflow chain, you should have:

- The To Do role and To Do type defined in the application.
- Action algorithms defined in the application, in case you want to use any of them.

Procedure

To define an approval workflow chain:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **A** and then click **Approval Workflow Chain**.
   The **Approval Workflow Chain** screen appears.
3. Click the **Add** button in the **Page Title** area of the **Approval Workflow Chain** screen.

   The **Approval Workflow Chain** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details of the approval workflow chain.
   - **Approval Levels** - Used to specify a level in the approval workflow chain.

   The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Approval Workflow Chain	Used to specify the approval workflow chain	Yes

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Field Name	Field Description	Mandatory (Yes or No)
Description	Used to specify the description for the approval workflow chain	Yes
To Do Role To Resolve	Used to specify the To Do Role to indicate the users who will receive a notification when the approval transactions are rejected by an approver at any level in the hierarchy.	Yes

4. Enter the required details.
5. Define approval levels for the approval workflow chain, if required.
6. Click **Save**.
   The approval workflow chain is defined.

Related Topics

For more information on...	See...
Approval Workflow Chain screen	Approval Workflow Chain (Used for Searching) on page 1039
Approval Workflow Chain zone	Approval Workflow Chain on page 1043
How to define Approval Levels for an approval workflow chain	Defining Approval Levels for an Approval Workflow Chain on page 1042

Defining Approval Levels for an Approval Workflow Chain

Prerequisites

To define approval levels in the approval workflow chain, you should have:

- The To Do Role and To Do Type defined in the application.
- Action algorithms defined in the application, in case you want to use any of them.

Procedure

To define an approval levels for an approval workflow chain:

1. Ensure that the **Approval Levels** section is expanded when you are defining or editing an approval workflow *c*hain.

   The **Approval Levels** section contains the following fields

Field Name	Field Description	Mandatory (Yes or No)
Action Algorithm	Used to specify the additional action that you want the system to perform apart from generating a notification when the approver approves or rejects the request. **Note:** You can search for an action algorithm by clicking the **Search** (🔍) icon corresponding to the **Action Algorithm** field.	Yes
Approver To Do Role	Used to specify the To Do role to indicate the users who will either approve or reject the request at this level in the hierarchy. **Note:** You can search for an approver to do role by clicking the **Search** (🔍) icon corresponding to the **Approver To Do Role** field.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
Approver To Do Type	Used to specify the type of notification that you want to generate when the approver approves or rejects the request. **Note:** You can search for an approver to do type by clicking the **Search** (🔍) icon corresponding to the **Approver To Do Type** field.	Yes

2. Enter the required details in the **Approval Levels** section.
3. If you want to define more than one approval level for the approval workflow chain, click the **Add** (+) icon *a*nd then repeat step 2. However, if you want to remove a approval level from the approval *w*orkflow chain, click the **Delete** (🗑) icon corresponding to the approval level.

Related Topics

For more information on...	See...
How to define an approval workflow chain	Defining an Approval Workflow Chain on page 1041
How to edit an approval workflow chain	Editing an Approval Workflow Chain on page 1044

Approval Workflow Chain (Used for Viewing)

Once you define an approval workflow chain, the **Approval Workflow Chain** screen allows you to:

- View the details of an approval workflow chain
- Edit an approval workflow chain
- Delete an approval workflow chain

This screen contains the following zone:

- Approval Workflow Chain on page 1043

Approval Workflow Chain

The **Approval Workflow Chain** zone displays the details of the approval workflow chain. It contains the following sections:

- **Main** - Displays basic information about the approval workflow chain. It contains the following fields:

Field Name	Field Description
Approval Workflow Chain	Displays the approval workflow chain and levels.
Description	Displays the description of the approval workflow chain and levels.
To Do Role To Resolve	Displays the description of To Do Role role type.

- **Approval Levels** - Displays the levels defined in the approval workflow chain.

Field Name	Field Description
Action Algorithm	Indicates the additional action that the system will perform apart from generating a notification when the approver approves or rejects the request.
Level	Indicates the level in the hierarchy.

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Field Name	Field Description
Approver To Do Role	Indicates that the users with the specified To Do role will either approve or reject the request at this level in the hierarchy.
Approval To Do Type	Indicates the type of notification that will be generated when the approver approves or rejects the request.

- **Record Actions** - This section contains the following buttons:

Button Name	Button Description
Edit	Used to edit and delete the approval workflow chain and approval levels.
Delete	Used to delete the approval workflow chain.

- **Record Information** - This section contains the following field:

Field Name	Field Description
Business Object	Indicates the business object using which the approval workflow chain is created. In addition, a context menu appears corresponding to this field which helps in navigating to other screens in the application. **Note:** It has a link. On clicking the link, the **Business Object** screen appears where you can view the details of the respective business object.

Editing an Approval Workflow Chain

Procedure

To edit an approval workflow chain:

1. Search for an approval workflow chain in the **Search Approval Workflow Chain** screen.
2. In the **Search Results** section, click the link in the **Description** column corresponding to the *a*pproval workflow chain whose details you want to edit.
   The **Approval Workflow Chain** screen appears.
3. Click the **Edit** button in the **Approval Workflow Chain**.
   The **Approval Workflow Chain** screen appears.
   - **Main** - Used to specify the basic details of the approval workflow chain. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Approval Workflow Chain	Displays the approval workflow chain.	Yes
Description	Displays the description for the approval workflow chain.	Yes
To Do Role To Resolve	Displays the To Do role to indicate the users who will be sent a notification when the approval workflow request is rejected by an approver at any level in the hierarchy.	Yes

   - **Approval Levels** - Used to specify a level in the approval workflow chain. It contains the following fields:

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Field Name	Field Description	Mandatory (Yes or No)
Action Algorithm	Displays the additional action that you want the system to perform apart from generating a notification when the approver approves or rejects the request.	Yes
Approver To Do Role	Displays the To Do role to indicate the users who will either approve or reject the request at this level in the hierarchy.	Yes
Approval To Do Type	Displays the type of notification that you want to generate when the approver approves or rejects the request.	Yes

4. Modify the required details in the **Main** section.
5. Edit, or remove approval levels from the approval workflow chain, if required.
6. Click **Save**.
   The changes made to the approval workflow chain screen are saved.

Related Topics

For more information on...	See...
Approval Workflow Chain screen	Approval Workflow Chain (Used for Viewing) on page 1043
Approval Workflow Chain zone	Approval Workflow Chain on page 1043
How to define approval levels for an approval workflow chain	Defining an Approval Workflow Chain on page 1041

Deleting an Approval Workflow Chain

Procedure

To delete an approval workflow chain:

1. Search for the approval workflow chain in the **Search Approval Workflow Chain** screen.
2. In the **Search Results** section, click the link in the **Description** column corresponding to the approval *w*orkflow chain that you want to delete.
   The **Approval Workflow Chain** screen appears.
3. Click the **Delete** button in the **Approval Workflow Chain** zone.
   A message appears confirming whether you want to delete the approval workflow chain.
4. Click **OK**.
   The approval workflow chain is deleted.

Related Topics

For more information on...	See...
How to search for an approval workflow chain	Searching for an Approval Workflow Chain on page 1040
Approval Workflow Chain screen	Approval Workflow Chain (Used for Viewing) on page 1043
Approval Workflow Chain zone	Approval Workflow Chain on page 1043

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Approval Workflow Criterion Type (Used for Searching)

The **Approval Workflow Criterion Type** screen allows you to search for an approval workflow criterion type using various search criteria. Through this screen, you can navigate to the following screen:

- Approval Workflow Criterion Type (Used for Viewing) on page 1049

This screen consists of the following zone:

- Search Approval Workflow Criterion Type on page 1046

Search Approval Workflow Criterion Type

The **Search Approval Workflow Criterion Type** zone allows you to search for an approval workflow criterion type using various search criteria. It contains the following two sections:

- **Search Criteria** - The **Search Criteria** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Approval Workflow Criterion Type	Used to search a particular approval workflow criterion type.	Yes
Description	Used to specify the description for the approval workflow criteria type.	No

Note: You must specify at least one search criterion while searching for an approval workflow criterion type.

- **Search Results** - On clicking the **Search** button, the search results are filtered based on the specified search criteria. The **Search Results** section contains the following columns:

Column Name	Column Description
Approval Workflow Criterion Type	Displays the approval workflow criterion type.
Description	Displays the description of the approval workflow criterion type.

Related Topics

For more information on...	See...
How to search for an approval workflow criterion type	Searching for an Approval Workflow Criterion Type on page 1046
How to view the details of an approval workflow criterion type	Viewing the Approval Workflow Criterion Type Details on page 1047

Searching for an Approval Workflow Criterion Type

Procedure

To search the approval workflow criterion type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **A** and then click **Approval Workflow Criterion Type**.
   The **Approval Workflow Criterion Type** screen appears.

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3. Enter the search criteria in the **Search Approval Workflow Criterion Type** zone.

> **Note:** ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.

4. Click **Search**
   A list of approval workflow criterion types that meet the search criteria appears in the **Search Results** section.

Related Topics

For more information on...	See...
Approval Workflow Criterion Type screen	Approval Workflow Criterion Type (Used for Searching) on page 1046
Approval Workflow Criterion Type zone	Search Approval Workflow Criterion Type on page 1046

Viewing the Approval Workflow Criterion Type Details

Procedure

To view the details of an approval workflow criterion type:

1. If required, filter the approval workflow criterion type details in the **Search Approval Workflow Criterion Type** *s*creen.
2. In the **Search Results** section, click the link in the **Description** column corresponding to the approval *w*orkflow criterion type whose details you want to view.

   The **Approval Workflow Criterion** screen appears. It contains the following zone:

   - Approval Workflow Criterion Type on page 1049
3. View the details of the approval workflow criterion type in the **Approval Workflow Criterion Type** zone.

Related Topics

For more information on...	See...
How to search the approval workflow criterion type	Searching for an Approval Workflow Criterion Type on page 1046
Approval Workflow Criterion Type screen	Approval Workflow Criterion Type (Used for Viewing) on page 1049
Approval Workflow Criterion Type zone	Approval Workflow Criterion Type on page 1049

Defining an Approval Workflow Criterion Type

Prerequisites

To define an approval workflow criterion type, you should have:

- Algorithm, Business object, and Field object defined in the application.

Procedure

To define an approval workflow criterion type:

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1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **A** and then click **Approval Workflow Criterion Type**.
   The **Approval Workflow Criterion Type** screen appears.
3. Click the **Add** button in the **Page Title** area of the **Approval Workflow Criterion Type** screen.
   The **Approval Workflow Criterion Type** screen appears. It contains the following section:

   - **Main** - Used to specify basic details about the approval workflow criterion type.

   The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Approval Workflow Criterion Type	Used to specify the approval workflow criterion type.	Yes
Description	Used to specify the description for the approval workflow criterion type.	Yes
Derived From	Used to indicate the option which triggers the approval workflow. The valid values are: • Algorithm • Business Object	Yes
Algorithm	Used to indicate the algorithm for which you want to define the approval workflow criterion type. **Note:** The **Search** (🔍) icon appears corresponding to this field. On clicking the Search icon, the Algorithm Search window appears. This field appears when you select the Algorithm option form the Derived From list.	Yes
Business Object	Used to indicate the business object for which you want to define the approval workflow criterion type. **Note:** The **Search** (🔍) icon appears corresponding to this field. On clicking the Search icon, the Business Object Search window appears. This field appears when you select the Business Object option form the Derived From list.	Yes
Field	Used to indicate the field that you want to use to define the criteria for associating approval workflow requests with the approval workflow chains.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The **Search** (🔍) icon corresponding to this field. On clicking the Search icon, the Field Search window appears. This field appears when you select the Business Object option form the Derived From list.	

4. Enter the required details.
5. Click **Save**.
   The approval workflow criterion type is created.

Related Topics

For more information on...	See...
Approval Workflow Criterion Type screen	Approval Workflow Criterion Type (Used for Viewing) on page 1049
Search Approval Workflow Criterion Type zone	Search Approval Workflow Criterion Type on page 1046

Approval Workflow Criterion Type (Used for Viewing)

Once you define an approval workflow criterion type, the **Approval Workflow Criterion Type** screen allows you to:

- Edit the details of an approval workflow criterion type
- Delete an approval workflow criterion type

This screen contains the following zone:

- Approval Workflow Criterion Type on page 1049

Approval Workflow Criterion Type

The **Approval Workflow Criterion Type** zone displays the details of the approval workflow criterion types. It contains the following sections:

- **Main** - Displays basic information about the approval workflow criterion type. It contains the following fields:

Field Name	Field Description
Approval Workflow Criterion Type	Displays the approval workflow criterion type.
Description	Displays the description of the approval workflow criterion type.
Derived From	Indicates the criteria type that triggers the approval workflow. The valid values are: • Algorithm • Business Object
Business Object	Indicates the business object using which the approval workflow criterion type is created. In addition, a context menu appears corresponding to this field which helps in navigating to other screens in the application.

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Field Name	Field Description
	Note: It has a link. On clicking the link, the **Business Object** screen appears where you can view the details of the respective business object.
Field	Indicates the field using which the criteria for associating approval workflow requests with the approval workflow chains will be defined.
	Note: It has a link. On clicking the link, the **Fields** screen appears where you can view the details of the respective field.

- **Record Actions** - This section contains the following buttons:

Button Name	Button Description
Edit	Used to edit the approval workflow criterion type.
Delete	Used to delete the approval workflow criterion type.

- **Record Information** - This section contains the following field:

Field Name	Field Description
Business Object	Indicates the business object using which the approval workflow chain and levels is created. In addition, a context menu appears corresponding to this field which helps in navigating to other screens in the application.
	Note: It has a link. On clicking the link, the **Business Object** screen appears where you can view the details of the respective business object.

Editing an Approval Workflow Criterion Type

Procedure

To edit an approval workflow criterion type:

1. Search for the approval workflow criterion type in the **Approval Workflow Criterion Type** screen.
2. In the **Search Results** section, click the link in the **Description** column corresponding to the approval *w*orkflow criterion type whose details you want to edit.
   The **Approval Workflow Criterion Type** screen appears.
3. Click the **Edit** button in the **Approval Workflow Criterion Type** zone.

   The **Approval Workflow Criterion Type** screen appears. It contains the following section:

   - **Main** - This section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Approval Workflow Criterion Type	Displays the approval workflow criterion type.	Yes
Description	Displays the description for the approval workflow criterion type.	Yes
Derived From	Displays an option which triggers the approval workflow.	Yes
Algorithm	Displays the algorithm for which you want to define the approval workflow criterion type.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The **Search** (🔍) icon corresponding to this field. On clicking the Search icon, the Algorithm Search window appears This field appears when you select the Algorithm option form the Derived From list.	
Business Object	Displays the business object which is used to define the approval workflow criterion type. **Note:** The **Search** (🔍) icon corresponding to this field. On clicking the Search icon, the Business Object Search window appears. This field appears when you select the Business Object option form the Derived From list.	Yes
Field	Displays the field which is used to define the criteria for associating approval workflow requests with the approval workflow chains. **Note:** The Search (🔍) icon corresponding to the respective field. On clicking the Search icon, the Field Search window appears. This field appears when you select the Business Object option form the Derived From list.	Yes

4. Modify the required details in the **Approval Workflow Criterion Type** screen.
5. Click **Save**.
   The changes made to the approval workflow criterion type screen are saved.

Related Topics

For more information on...	See...
How to search for an approval workflow criterion type	Searching for an Approval Workflow Criterion Type on page 1046
Approval Workflow Criterion Type screen	Approval Workflow Criterion Type (Used for Viewing) on page 1049
Approval Workflow Criterion Type zone	Approval Workflow Criterion Type on page 1049

Deleting an Approval Workflow Criterion Type

Procedure

To delete an approval workflow criterion type:

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1. Search for the approval workflow criterion type in the **Approval Workflow Criterion Type** screen.
2. In the **Search Results** section, click the link in the **Description** column corresponding to the approval *w*orkflow criterion type whose details you want to delete.
   The **Approval Workflow Criterion Type** screen appears.
3. Click the **Delete** button in the **Approval Workflow Criterion Type** zone.
   A message appears confirming whether you want to delete the approval workflow criterion type.
4. Click **OK**.
   The approval workflow criterion type is deleted.

Related Topics

For more information on...	See...
How to search for an approval workflow criterion type	Searching for an Approval Workflow Criterion Type on page 1046
Approval Workflow Criterion Type screen	Approval Workflow Criterion Type (Used for Viewing) on page 1049
Approval Workflow Criterion Type zone	Approval Workflow Criterion Type on page 1049

Approval Workflow Group Chain Linkage (Used for Searching)

The **Approval Workflow Group Chain Linkage** screen allows you to search for an approval workflow group chain linkage using various search criteria. Through this screen, you can navigate to the following screen:

- Approval Workflow Group Chain Linkage (Used for Viewing) on page 1058

This screen consists of the following zone:

- Search Approval Workflow Group Chain Linkage on page 1052

For more information on...	See...
How to search for an approval workflow group chain linkage	Searching for an Approval Workflow Group Chain Linkage on page 1053
How to view the details of an approval workflow group chain linkage	Viewing the Approval Workflow Group Chain Linkage Details on page 1054

Search Approval Workflow Group Chain Linkage

The **Search Approval Workflow Group Chain Linkage** zone allows you to search for an approval workflow group chain linkage using various search criteria. It contains the following two sections:

- **Search Criteria** - The **Search Criteria** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Group Chain Linkage ID	Used to search a particular approval workflow group chain linkage.	Yes
Approval Workflow Group	Used to search a group chain linkage for which an approval workflow group is defined.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
Approval Workflow Chain	Used to search a group chain linkage for which an approval workflow chain is defined.	Yes

Note: You must specify at least one search criterion while searching for an approval workflow group chain linkage.

- **Search Results** - On clicking the **Search** button, the search results appear based on the specified search criteria.

  The **Search Results** section contains the following columns:

Column Name	Column Description
Group Chain Linkage ID	Displays the ID which is generated automatically when the link is created.
Approval Workflow Group	Indicates the approval workflow group for which the link is created.
	Note: It has a link. On clicking the link, the **Approval Workflow Group Chain Linkage** screen appears with the details of the respective business object.
Approval Workflow Chain	Indicates the approval workflow chain for which the link is created.
Field Approval Rule	Indicates whether you want to configure approval rule for one or more fields of the business objects which are included in the approval workflow group. The valid values are: • Yes • No

Related Topics

For more information on...	See...
How to search for an approval work group chain linkage	Searching for an Approval Workflow Group Chain Linkage on page 1053
How to view the details of an approval workflow group chain linkage	Viewing the Approval Workflow Group Chain Linkage Details on page 1054

Searching for an Approval Workflow Group Chain Linkage

Procedure

To search an approval workflow group chain linkage:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **A** and then click **Approval Workflow Group Chain Linkage**.
   The **Approval Workflow Group Chain Linkage** screen appears.
3. Enter the search criteria in the **Search Group Chain Linkage** zone.

   Note: ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.
4. Click **Search**.
   A list of group chain linkages that meet the search criteria appears in the **Search Results** section.

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Related Topics

For more information on...	See...
Approval Workflow Group Chain Linkage screen	Approval Workflow Group Chain Linkage (Used for Searching) on page 1052
Search Approval Workflow Group Chain Linkage zone	Search Approval Workflow Group Chain Linkage on page 1052

Viewing the Approval Workflow Group Chain Linkage Details

Procedure

To view the details of an approval workflow chain linkage:

1. Search for the approval workflow group chain linkage in the **Approval Workflow Group Chain Linkage** screen.
2. In the **Search Results** section, click the link in the **Approval Workflow Group** column corresponding to *t*he approval workflow chain whose details you want to view.

   The **Approval Workflow Group Chain Linkage** screen appears. It contains the following zone:

   - Approval Workflow Group Chain Linkage on page 1058
3. View the details of the approval workflow group chain linkage in the **Approval Workflow Group Chain Linkage** zone.

Related Topics

For more information on...	See...
How to search for an approval workflow group chain linkage	Searching for an Approval Workflow Group Chain Linkage on page 1053
Approval Workflow Group Chain Linkage screen	Approval Workflow Group Chain Linkage (Used for Viewing) on page 1058

Defining an Approval Workflow Group Chain Linkage

Prerequisites

To define an approval workflow group chain linkage, you should have:

- Business Object, Field, Criterion Type, Approval Workflow Group and Approval Workflow Chain defined in the application.

Procedure

To define an approval workflow group chain linkage:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **A** and then click **Approval Workflow Group Chain Linkage**.
   The **Approval Workflow Group Chain Linkage** screen appears.
3. Click the **Add** button in the **Page Title** area of the **Approval Workflow Group Chain Linkage** screen.

   The **Approval Workflow Group Chain Linkage** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details about the approval workflow group chain linkage.
   - **Group Chain Linkage Criteria** - Used to define group chain linkage criteria for the approval workflow type.

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The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Approval Workflow Group	Used to indicate the approval workflow group. **Note:** You can search for an approval workflow group type by clicking the Search (🔍) icon corresponding to the field.	Yes
Approval Workflow Chain	Used to indicate the approval workflow chain. **Note:** You can search for an approval workflow chain by clicking the Search (🔍) icon corresponding to the field.	Yes
Field Approval Rule	Used to indicate whether you want to configure approval rule for one or more fields of the business objects which are included in the approval workflow group. The valid values are: • Yes • No	Yes

4. Enter the required details.
5. Define group chain linkage criteria for the approval workflow, if required.
6. Define field approval rule criteria for the approval workflow, if required.
7. Click **Save**.
   The approval workflow group chain linkage is created.

Related Topics

For more information on...	See...
Approval Workflow Chain Linkage screen	Approval Workflow Group Chain Linkage (Used for Searching) on page 1052
Search Approval Workflow Chain Linkage zone	Search Approval Workflow Group Chain Linkage on page 1052
How to define group chain linkage criteria for an approval workflow	Defining an Approval Workflow Group Chain Linkage on page 1054

Defining Group Chain Linkage Criteria for an Approval Workflow

Prerequisites

To define group chain linkage criteria for an approval workflow, you should have:

- Approval Workflow Criterion Type defined in the application.

Procedure

To define group chain linkage criteria for an approval workflow:

1. Ensure that the **Group Chain Linkage Criteria** section is expanded when you are defining or editing an approval workflow.

   The **Group Chain Linkage Criteria** section contains the following fields:

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Field Name	Field Description	Mandatory (Yes or No)
Group Chain Linkage ID	Displays the Group Chain Linkage ID. **Note:** The data appears in this field when you are editing the details of an approval workflow criterion type.	Yes
Criterion Type	Used to indicate the criteria type needed for defining the criterion. **Note:** The Search (🔍) icon appears corresponding to this field. On clicking the Search icon, the Approval Workflow Chain Search window appears.	Yes
Operator	Used to indicate the relational operator used to define the relation between the criterion type and criterion value.	Yes
Criterion Value	Used to specify the criterion value.	Yes

2. Enter the required details.
3. If you want to define more than one group chain linkage criteria for the approval workflow, click the **Add** (+) icon, and then repeat step 2.

Note: However, if you want to remove a group chain linkage criteria from the approval workflow, click the **Delete** (🗑) icon corresponding to the group chain linkage criteria.

Related Topics

For more information on...	See...
How to edit an approval workflow group chain linkage	Editing an Approval Workflow Group Chain Linkage on page 1061

Defining a Field Approval Rule

Prerequisites

To define a field approval rule for an approval workflow group chain linkage, you should have:

- Business Object, Field, and Approval Workflow Chain to be defined in the application.

Procedure

To define a field approval rule for an approval workflow group chain linkage:

1. Ensure that the **Field Approval Rule Criteria** section is expanded when you select the Yes option from the Field Approval Rule field of the Main section.
   The **Field Approval Rule Criteria** section contains the following fields in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Sequence.	Used to indicate the order in which the rule criteria should be executed while adding or updating the field value.	Yes
Applicable For	Used to indicate whether the rule criteria should be considered while adding and/or updating the field value. The valid values are: • Add	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	• Update • Add and Update	
Business Object	Used to indicate the business object in which the field is included. **Note:** The **Search** (🔍) icon appears corresponding to the **Business Object** field. On clicking the search icon, the **Search Group Based Business Object** search window appears.	Yes
Field	Used to indicate the field for which you want to define the approval rule criteria. **Note:** The **Search** (🔍) icon appears corresponding to the **Field** search field. On clicking the search icon, the **Field Search** search window appears.	Yes
Approval Workflow Chain	Used to indicate the approval workflow chain that you want to use for the field value approval. **Note:** The **Search** (🔍) icon appears corresponding to the **Approval Workflow Chain** field. On clicking the search icon, the **Approval Workflow Chain Search** search window appears.	Yes
Value Range	Used to indicate whether you want to define value based threshold limit for each approval level. **Note:** This field is enabled when the data type of the field is **Numeric**.	No
Hierarchical	Used to indicate whether multi-level or single-level approval is required while adding or updating the field value beyond the threshold limit.	No

If the **Value Range** check box is selected, a grid appears with the following set of fields:

Field	Field Description
Threshold Value	Used to specify the threshold value using which you want to control the approval hierarchy.
Approval Level	Used to indicate the approval level at which approval is required when the field value is within the threshold value.

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Field	Field Description
	Note: The **Search** (🔍) icon appears corresponding to the **Approval Level** field. On clicking the search icon, the **Approval Level Search** search window appears.
	Note: The search results will include all those levels which are defined in the approval workflow chain.
Approval Level Information	Displays additional information about the approval level.

2. Enter the required details in the **Field Approval Rule Criteria** section.
3. If you want to define more than one field approval rule criteria for the approval workflow chain linkage, click the **Add** (+) icon and then repeat step 2. However, if you want to remove a field approval rule criteria from the approval workflow chain linkage, click the **Delete** (🗑) icon corresponding to the sequence field.
4. Click **Save**.
   The approval workflow field rule is defined.

Related Topics

For more information on...	See...
How to edit an approval workflow group chain linkage	Editing an Approval Workflow Group Chain Linkage on page 1061

Approval Workflow Group Chain Linkage (Used for Viewing)

Once you define an approval workflow group chain linkage, the **Approval Workflow Group Chain Linkage** screen allows you to:

- Edit an approval workflow group chain linkage
- Delete an approval workflow group chain linkage

This screen contains the following zone:

- Approval Workflow Group Chain Linkage on page 1058

For more information on...	See...
How to view the details of an approval workflow group chain linkage	Viewing the Approval Workflow Group Chain Linkage Details on page 1054

Approval Workflow Group Chain Linkage

The **Approval Workflow Group Chain Linkage** zone displays the details of the approval workflow group chain linkage. It contains the following sections:

- **Main** - Displays basic information about the approval workflow group chain linkage. It contains the following fields:

Field Name	Field Description
Approval Workflow Group	Displays the approval workflow group for which a link is created.

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Field Name	Field Description
	Note: It has a link. On clicking the link, the **Approval Workflow Group** screen appears with the details of the respective approval workflow group.
Approval Workflow Chain	Displays the approval workflow chain for which a link is created.
	Note: It has a link. On clicking the link, the **Approval Workflow Chain** screen appears with the details of the respective approval workflow group.
Field Approval Rule	Indicates whether you want to configure approval rule for one or more fields of the business objects which are included in the approval workflow group. The valid values are: • Yes • No

- **Record Actions** - This section contains the following buttons:

Button Name	Button Description
Edit	Used to edit the details of the approval workflow group chain linkage. Also used to define, edit, delete Group Chain Linkage Criteria and Field Approval Rule Criteria.
Delete	Used to delete the approval workflow group chain linkage.

- **Record Information** - This section contains the following field:

Field Name	Field Description
Business Object	Indicates the business object using which the approval workflow chain linkage is created. In addition, a context menu appears corresponding to this field which helps in navigating to other screens in the application.
	Note: It has a link. On clicking the link, the **Business Object** screen appears where you can view the details of the respective business object.

- **Group Chain Linkage Criteria** - Lists the group chain linkage criteria..This section contains the following columns:

Column Name	Column Description
Group Chain Linkage ID	Displays the ID which is generated automatically when the link is created.
Criterion Type	Displays the criterion type needed for defining the criterion.
	Note: It has a link. On clicking the link, the **Approval Workflow Criterion Type** screen appears where you can view the details of the respective criterion type.
Operator	Indicates the relational operator used to define the relation between the criterion type and criterion value. The valid values are: • EQUALS • IN
Criterion Value	Displays the criterion value.

- **Field Approval Rule Criteria** - Lists the field approval rule criteria for approval workflow group chain linkage. It contains the following columns:

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Column Name	Column Description
Sequence	Indicates the order in which the rule criteria should be executed while adding or updating the field value.
Applicable For	Displays the rule criteria which should be considered while adding and/or updating the field value.
Business Object	Displays the business object in which the field is included.
Field	Displays the field for which you want to define the approval rule criteria.
	Note: The **Context Menu** (▾) icon appears corresponding to the **Field** search field. On clicking the context menu icon, the **Go to Field** menu appears. On clicking the **Go to Field** menu item, the **Field** screen appears with the details of the respective field.
	Note: It has a link. On clicking the link, the **Field** screen appears with the details of the respective field.
Approval Workflow Chain	Indicates the approval workflow chain that you want to use for the field value approval.
	Note: It has a link. On clicking the link, the **Approval Workflow Chain** screen appears with the details of the respective approval workflow chain.
Value Range	Indicates whether you want to define value based threshold limit for each approval level.
	Note: This field is enabled when the data type of the field is **Numeric**.
Hierarchical Approval	Indicates whether multi-level or single-level approval is required while adding or updating the field value beyond the threshold limit.
	Note: This field is enabled when the **Value Range** check box is selected.

If the **Value Range** check box is selected, a grid appears with the following set of fields:

Field	Field Description
Threshold Value	Displays the threshold value using which you want to control the approval hierarchy.
Approval Level	Displays the approval level at which approval is required when the field value is within the threshold value.

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Field	Field Description
	Note: The **Search** (🔍) icon appears corresponding to the **Approval Level** field. On clicking the search icon, the **Approval Level Search** search window appears.
	Note: The search results will include all those levels which are defined in the approval workflow chain.
Approval Level Information	Displays additional information about the approval level.

Editing an Approval Workflow Group Chain Linkage

Prerequisites

To edit an approval workflow group chain linkage, you should have:

- Business Object, Field, Criterion Type, Approval Workflow Group, and Approval Workflow Chain defined in the application.

Procedure

To edit an approval workflow group chain linkage:

1. Search for the Approval Workflow Group Chain Linkage in the **Approval Workflow Group Chain Linkage** screen.
2. In the **Search Results** section, click the link in the **Approval Workflow Group** column corresponding to the *a*pproval workflow chain whose details you want to edit.

   The **Approval Workflow Group Chain Linkage** screen appears.
3. Click the **Edit** button in the **Approval Workflow Group Chain Linkage** zone.
   The **Approval Workflow Group Chain Linkage** screen appears.
4. Define or edit approval workflow group chain linkage, if required.
5. Define, edit or remove approval workflow criterion from the approval workflow group chain linkage, if required.
6. Define, edit or remove field approval rule criteria from the approval workflow group chain linkage, if required.
7. Click **Save**.
   The changes made to the approval workflow group chain linkage screen are saved.

Related Topics

For more information on...	See...
How to search approval workflow group chain linkage	Searching for an Approval Workflow Group Chain Linkage on page 1053
Approval Workflow Group Chain Linkage screen	Approval Workflow Group Chain Linkage (Used for Viewing) on page 1058
Approval Workflow Group Chain Linkage zone	Approval Workflow Group Chain Linkage on page 1058

Deleting an Approval Workflow Group Chain Linkage

Procedure

To delete an approval workflow group chain linkage:

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1. Search for an approval workflow group chain linkage in the **Search Approval Workflow Group Chain Linkage** zone.
2. In the **Search Results** section, click the link in the **Approval Workflow Group** column corresponding to *t*he approval workflow chain that you want to delete.
   The **Approval Workflow Group Chain Linkage** screen appears.
3. Click the **Delete** button in the **Approval Workflow Group Chain Linkage** zone.
   A message appears confirming whether you want to delete the approval workflow group chain linkage.
4. Click **OK**.
   The approval workflow group chain linkage is deleted.

Related Topics

For more information on...	See...
How to search for an approval workflow group chain linkage	Searching for an Approval Workflow Group Chain Linkage on page 1053

Approval Workflow Setting (Used for Searching)

The **Approval Workflow Setting** screen allows you to search for approval workflow setting using various search criteria. It consists the following zone:

- Search Approval Workflow Group on page 1062

Through this screen, you can navigate to the following screen:

- Approval Workflow Setting (Used for Viewing) on page 1066

For more information on...	See...
How to search for an approval workflow setting	Searching for an Approval Workflow Group on page 1063
How to view the details of approval workflow settings	Viewing the Approval Workflow Setting Details on page 1064

Search Approval Workflow Group

The **Search Approval Workflow Group** zone allows you to search for an approval workflow group using various search criteria. It contains the following two sections:

- **Search Criteria** - The **Search Criteria** section contains the following fields::

Field Name	Field Description	Mandatory (Yes or No)
Approval Workflow Group	Used to search a particular approval workflow group.	Yes
Description	Used to search approval workflow group with a particular description.	Yes

Note: You must specify at least one search criterion while searching for an approval workflow group.

- **Search Results** - On clicking the **Search** button, the search results appear based on the specified search criteria. The **Search Results** section contains the following columns:

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Column Name	Column Description
Approval Workflow Group	Displays the approval workflow group.
Description	Displays the description of the approval workflow group.
	Note: It has a link. On clicking the link, the **Approval Workflow Group** screen appears where you can view the details of the respective approval workflow group.

Related Topics

For more information on...	See...
How to search for an approval workflow group	Searching for an Approval Workflow Group on page 1024
How to view the details of approval workflow setting	Viewing the Approval Workflow Setting Details on page 1064

Searching for an Approval Workflow Group

Prerequisites

To search for an approval workflow group, you should have:

- Approval Workflow Group defined in the application.
- Active flag should be set to **Yes**

Procedure

To search for an approval workflow group:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, Select **A** and then click **Approval Workflow Setting**.
   The **Approval Workflow Setting** screen appears.
3. Enter the search criteria in the **Search Approval Workflow Group** zone.

   Note: ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.
4. Click **Search**.

   A list of approval workflow groups that meet the search criteria appears in the **Search Results** section.

Related Topics

For more information on...	See...
Approval Workflow Setting screen	Approval Workflow Setting (Used for Viewing) on page 1066
Search Approval Workflow Group zone	Search Approval Workflow Group on page 1024

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Viewing the Approval Workflow Setting Details

Procedure

To view the details of approval workflow setting:

1. Search for an approval workflow group in the **Approval Workflow Setting** screen.
2. In the **Search Results** section, click the link in the **Description** column corresponding to *t*he approval workflow group whose details you want to view.
   The **Approval Workflow Settings** screen appears.
3. View the details of the approval workflow group in the **Approval Workflow Group Settings** zone.

Related Topics

For more information on...	See...
Approval Workflow Group Settings screen	Approval Workflow Setting (Used for Viewing) on page 1066
Approval Workflow Group Settings zone	Approval Workflow Group Settings on page 1066
How to search for an approval workflow setting	Searching for an Approval Workflow Group on page 1063

Defining Approval Workflow Group Settings

Prerequisites

To define an approval workflow group setting, you should have:

- Approval Workflow Group defined in the application.
- Active flag set to **Yes**

Procedure

To define an approval workflow group setting:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **A** and then click **Approval Workflow Setting**.
   The **Approval Workflow Settings** screen appears.
3. Click the **Add** button in the **Page Title** area of the **Approval Workflow Settings** screen.
   The **Approval Workflow Settings** screen appears. It contains the following section:

   - **Main** - Used to specify the details for the approval workflow settings.

   The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Approval Workflow Group	Used to specify the approval workflow group.	Yes
Approval Chain Selection Algorithm	Used to specify the algorithm that will be triggered before creating the approval workflow request. **Note:** This algorithm identifies the approval workflow chain that must be used for the approval workflow group.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	Note: You can search for an approval chain selection algorithm by clicking the **Search** (🔍) icon corresponding to the **Approval Chain Selection Algorithm** field.	
Prevalidation	Used to indicate whether validation must be done before the approval workflow request is created. The valid values are: • Yes • No **Note:** You can search for a prevalidation by clicking the **Search** (🔍) icon corresponding to the **Prevalidation** field.	Yes
Approval Reason Required	Used to indicate whether you want the approver to add reason and comments while approving the approval transaction. The valid values are: • Yes • No	Yes
Active	Used to indicate whether the approval workflow is required for the business objects in the approval workflow group. The valid values are: • **Yes** - Used when you want to activate the approval workflow for the business objects in the approval workflow group. • **No** - Used when you do not want to activate the approval workflow for the business objects in the approval workflow group. • **Conditional** - Used when you want to activate the approval workflow for business objects that satisfy particular criteria (for example, when the person or account belongs to a particular division). Note that, at present, this functionality works only for an approval workflow group which consists of a single business object.	Yes
Conditional Algorithm	Used to specify the algorithm that will be used to determine the business objects for which the approval workflow must be activated. **Note:** This field appears when the **Conditional** option is selected from the **Active** list.	Yes

4. Enter the required details.
5. Click **Save**.
   The approval workflow group setting is defined.

Related Topics

For more information on...	See...
Approval Workflow Group screen	Approval Workflow Group (Used for Searching) on page 1023

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For more information on...	See...
Search Approval Workflow Group zone	Search Approval Workflow Group on page 1024

Approval Workflow Setting (Used for Viewing)

Once the approval workflow group setting is defined, the **Approval Workflow Settings** screen allows you to:

- View the details of an approval workflow setting
- Edit the approval workflow group settings
- Delete an approval workflow group settings
- Regenerate approval workflow setting UI maps

This screen consists of the following zone:

- Approval Workflow Group Settings on page 1066

For more information on...	See...
How to edit the approval workflow group settings	Editing Approval Workflow Group Settings on page 1067
How to delete an approval workflow group settings	Deleting Approval Workflow Group Settings on page 1068
How to regenerate UI Maps	Regenerating Input and Display UI Maps on page 1068

Approval Workflow Group Settings

The **Approval Workflow Group Settings** zone displays the details of the approval workflow group settings. It contains the following sections:

- **Main** - Displays the basic information about the approval workflow group settings. It contains the following fields:

Field Name	Field Description
Approval Workflow Group	Displays the approval workflow group.
Approval Chain Selection Algorithm	Displays the algorithm that will be triggered after creating the approval workflow request. **Note:** This algorithm identifies the approval workflow chain that must be used for the approval workflow group. **Note:** It has a link. On clicking the link, the **Algorithm** screen appears where you can view the details of the respective approval chain selection algorithm.
Prevalidation	Indicates whether validation must be done before the approval workflow request is created. The valid values are: • Yes • No
Approval Reason Required	Indicates whether you want the approver to add reason and comments while approving the approval transaction. The valid values are: • Yes

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Field Name	Field Description
	• No
Active	Indicates whether the approval workflow is required for the business objects in the approval workflow group. The valid values are: • **Yes** - Used when you want to activate the approval workflow for the business objects in the approval workflow group. • **No** - Used when you do not want to activate the approval workflow for the business objects in the approval workflow group. • **Conditional** - Used when you want to activate the approval workflow for business objects that satisfy particular criteria (for example, when the person or account belongs to a particular division). Note that, at present, this functionality works only for an approval workflow group which consists of a single business object.
Conditional Algorithm	Displays the algorithm that will be used to determine the business objects for which the approval workflow must be activated. **Note:** This field appears when the **Conditional** option is selected from the **Active** list. **Note:** It has a link. On clicking the link, the **Algorithm** screen appears where you can view the details of the respective conditional algorithm.

- **Record Actions** - This section contains the following buttons:

Button Name	Button Description
Edit	Used to edit the settings of the approval workflow group.
Delete	Used to delete the approval workflow group setting.
Regenerate UI Maps	Used to regenerate the approval workflow group setting UI Maps.

- **Record Information** - This section contains the following fields:

Field Name	Field Description
Business Object	Indicates the business object using which the approval workflow reason is created. In addition, a context menu appears corresponding to this field which helps in navigating to other screens in the application. **Note:** It has a link. On clicking the link, the **Business Object** screen appears where you can view the details of the respective business object.

Editing Approval Workflow Group Settings

Prerequisites

To edit approval workflow group settings, you should have:

- Approval Chain Selection Algorithm defined in the application.
- Prevalidation, Approval Reason Required, and Active flag defined in the application.
- Conditional Algorithm defined in the application

Procedure

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To edit approval workflow group settings:

1. Search for the approval workflow group in the **Approval Workflow Setting** screen.
2. In the **Search Results** section, click the link in the **Description** column corresponding to the *a*pproval workflow group whose details you want to edit.
   The **Approval Workflow Settings** screen appears.
3. Click the **Edit** button in the **Approval Workflow Group Settings** zone.
   The **Approval Workflow Group Settings** screen appears.
4. Edit the settings for the approval workflow group, if required.
5. Click **Save**.
   The changes made to the approval workflow group settings are saved.

Related Topics

For more information on...	**See...**
How to search for an approval workflow group	Searching for an Approval Workflow Group on page 1024
Approval Workflow Settings screen	Approval Workflow Setting (Used for Viewing) on page 1066
Approval Workflow Group Settings zone	Approval Workflow Group Settings on page 1066

Deleting Approval Workflow Group Settings

Procedure

To delete approval workflow group settings:

1. Search for the approval workflow group in the **Approval Workflow Setting** screen.
2. In the **Search Results** section, click the link in the **Description** column *c*orresponding to the approval workflow group that you want to delete.
   The **Approval Workflow Settings** screen appears.
3. Click the **Delete** button in the **Approval Workflow Group Settings** zone.
   A message appears confirming whether you want to delete the approval workflow group settings.
4. Click **OK**.
   The approval workflow setting is deleted.

Related Topics

For more information on...	**See...**
How to search for an approval workflow group	Searching for an Approval Workflow Group on page 1024
Approval Workflow Settings screen	Approval Workflow Setting (Used for Viewing) on page 1066
Approval Workflow Group Settings zone	Approval Workflow Group Settings on page 1066

Regenerating Input and Display UI Maps

Procedure

To regenerate UI Maps for an approval workflow group setting:

1. Search for the approval workflow group in the **Approval Workflow Setting** screen.

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2. In the **Search Results** section, click the link in the **Description** column *c*orresponding to the approval workflow group for which you want to regenerate UI maps.
   The **Approval Workflow Settings** screen appears.
3. Click the **Regenerate UI Maps** button in the **Approval Workflow Group Settings** zone.
   A message appears confirming whether you want to replace the existing Input and Display UI Maps.
4. Click **OK**.
   The Input and Display UI Maps are generated.

Related Topics

For more information on...	See...
How to search for an approval workflow group	Searching for an Approval Workflow Group on page 1024
Approval Workflow Settings screen	Approval Workflow Setting (Used for Viewing) on page 1066
Approval Workflow Setting zone	Approval Workflow Group Settings on page 1066

Approval Workflow Reason

The **Approval Workflow Reason** screen lists the approval workflow reasons that are already defined in the system. It also allows you to define an approval workflow reason. The system enables you to define approval workflow reasons belonging to various categories. Depending on the reason category, the system enables you to use the reason for the appropriate function in different features, such as Approval Workflow and Deal Pricing Management.

This screen contains the following zone:

- Approval Workflow Reason List on page 1069

Through this screen, you can navigate to the following screen:

- Approval Workflow Reason (Used for Viewing) on page 1072

Approval Workflow Reason List

The **Approval Workflow Reason List** zone lists the approval workflow reasons that are already defined in the system. It contains the following columns:

Column Name	Column Description
Approval Workflow Reason	Displays the approval workflow reason.
Description	Displays the description of the approval workflow reason. **Note:** It has a link. On clicking the link, the **Approval Workflow Reason** screen appears where you can view the details of the respective approval workflow reason.
Reason Category	Indicates the category to which the approval workflow reason belongs. The valid values are: • Approve • Cancel • Deal General • Deal Reject • Deal Return • Reject

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You can filter the list using various search criteria (such as, **Approval Workflow Reason** and **Description**) available in the **Filter** area. By default, the **Filter** area is hidden. You can view the **Filter** area by clicking the **Filters** (▽) icon in the upper right corner of this zone.

Related Topics

For more information on...	See...
How to view the details of an approval workflow reason	Viewing the Approval Workflow Reason Details on page 1070

Viewing the Approval Workflow Reason Details

Procedure

To view the details of an approval workflow reason:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **A** and then click **Approval Workflow Reason**.
   The **Approval Workflow Reason** screen appears.
3. In the **Approval Workflow Reason List** zone, click the link in the **Description** column corresponding to the approval workflow reason whose details you want to view.
   The **Approval Workflow Reason** screen appears.
4. View the details of the approval workflow reason in the **Approval Workflow Reason** zone.

Related Topics

For more information on...	See...
Approval Workflow Reason screen	Approval Workflow Reason on page 1069
Approval Workflow Reason List zone	Approval Workflow Reason List on page 1069
Approval Workflow Reason screen	Approval Workflow Reason (Used for Viewing) on page 1072
Approval Workflow Reason zone	Approval Workflow Reason on page 1073

Defining an Approval Workflow Reason

Prerequisites

To define an approval workflow reason, you should have:

- Values defined in the **APPTXN_REASON_TYPE** lookup field

Procedure

To define an approval workflow reason:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **A** and then click **Approval Workflow Reason**.
   The **Approval Workflow Reason** screen appears.
3. Click the **Add** button in the **Page Title** area of the **Approval Workflow Reason** screen.

   The **Approval Workflow Reason** screen appears. It contains the following section:

   - **Main** - Used to specify the basic details for the approval workflow reason. It contains the following fields:

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Field Name	Field Description	Mandatory (Yes or No)
Approval Workflow Reason	Used to specify the approval workflow reason.	Yes
Description	Used to specify the description for the approval workflow reason.	Yes
Reason Category	Used to indicate the category to which the approval workflow reason belongs. The valid values are: • **Approve** - Used when you want to avail the reason while approving an approval transaction. The system will then list the reason in the respective field of the **Approval Reason** screen. **Note:** The **Approval Reason** screen appears when you click the **Approve** button in the **Comparison: New versus Existing** screen. It appears only when the **Approval Reason Required** field of the respective approval workflow group is set to **Yes**. • **Cancel** - Used when you want to avail the reason while canceling an approval transaction. The system will then list the reason in the respective field of the **Rejection/Cancelation Reason** screen. **Note:** The **Rejection/Cancelation Reason** screen appears when you click the **Revert to Original** button in the **Comparison: New versus Existing** screen. • **Deal General** - Used when you want to avail the reason while adding comments at the deal level. The system will then list the reason in the respective field of the **Deal Logs and Comments** screen. **Note:** The **Deal Logs and Comments** screen appears when you click the **Deal Log** link in the **Deal Information** screen. • **Deal Reject** - Used when you want to avail the reason while rejecting a deal. The system will then list the reason in the respective field of the **Deal Rejection** screen. **Note:** The **Deal Rejection** screen appears when you click the **Reject Deal** button in the **Deal Information** screen. • **Deal Return** - Used when you want to avail the reason while requesting the submitter to resubmit the deal. The system	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	will then list the reason in the respective field of the **Deal Approval Return To Submitter** screen. **Note:** The **Deal Approval Return To Submitter** screen appears when you click the **Resubmit Deal** button in the **Deal Information** screen. • **Reject** - Used when you want to avail the reason while rejecting an approval transaction. The system will then list the reason in the respective field of the **Rejection/Cancelation Reason** screen. **Note:** The **Rejection/Cancelation Reason** screen appears when you click the **Return to Submitter** button in the **Comparison: New versus Existing** screen. **Note:** The **Approve**, **Cancel**, and **Reject** reason categories are applicable only for the **Approval Workflow** feature. However, the **Deal General**, **Deal Reject**, and **Deal Return** reason categories are applicable only for the **Deal Pricing Management** feature.	

Tip: You can also define an approval workflow reason from the Approval Workflow Reason (Used for Viewing) on page 1072 screen.

4. Enter the required details in the **Main** section.
5. Click **Save**.
   The approval workflow reason is defined.

Related Topics

For more information on...	See...
Approval Workflow Reason screen	Approval Workflow Reason on page 1069

Approval Workflow Reason (Used for Viewing)

The **Approval Workflow Reason** screen enables you to do the following:

- View the details of an approval workflow reason
- Edit an approval workflow reason
- Delete an approval workflow reason

It contains the following zone:

- Approval Workflow Reason on page 1073

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Approval Workflow Reason

The **Approval Workflow Reason** zone displays the details of the approval workflow reason. It contains the following sections:

- **Main** - Displays the basic information about the approval workflow reason. It contains the following fields:

Field Name	Field Description
Approval Workflow Reason	Displays the approval workflow reason.
Description	Displays the description of the approval workflow reason.
Reason Category	Indicates the category to which the approval workflow reason belongs. The valid values are: • Approve • Cancel • Deal General • Deal Reject • Deal Return • Reject

- **Record Actions** - Enables you to perform various actions on the approval workflow reason. It contains the following buttons:

Button Name	Button Description
Edit	Used to edit the details of the approval workflow reason.
Delete	Used to delete the approval workflow reason.

- **Record Information** - This section contains the following field:

Field Name	Field Description
Business Object	Indicates the business object using which the approval workflow reason is created. In addition, a context menu (⊙) icon appears corresponding to this field which helps in navigating to other screens in the application. **Note:** It has a link. On clicking the link, the **Business Object** screen appears where you can view the details of the respective business object.

Related Topics

For more information on...	See...
How to edit an approval workflow reason	Editing an Approval Workflow Reason on page 1073
How to delete an approval workflow reason	Deleting an Approval Workflow Reason on page 1076

Editing an Approval Workflow Reason

Prerequisites

To edit an approval workflow reason, you should have:

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- Values defined in the **APPTXN_REASON_TYPE** lookup field

Procedure

To edit an approval workflow reason:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **A** and then click **Approval Workflow Reason**.
   The **Approval Workflow Reason** screen appears.
3. If required, filter the approval workflow reasons in the **Approval Workflow Reason** screen.
4. In the **Approval Workflow Reason List** zone, click the link in the **Description** column corresponding to the approval *w*orkflow reason whose details you want to edit.
   The **Approval Workflow Reason** screen appears.
5. Click the **Edit** button in the **Approval Workflow Reason** zone.

   The **Approval Workflow Reason** screen appears. It contains the following section:

   - **Main** - Used to specify the basic details for the approval workflow reason. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Approval Workflow Reason	Displays the approval workflow reason.	Not applicable
Description	Used to specify the description for the approval workflow reason.	Yes
Reason Category	Used to indicate the category to which the approval workflow reason belongs. The valid values are: • **Approve** - Used when you want to avail the reason while approving an approval transaction. The system will then list the reason in the respective field of the **Approval Reason** screen. **Note:** The **Approval Reason** screen appears when you click the **Approve** button in the **Comparison: New versus Existing** screen. It appears only when the **Approval Reason Required** field of the respective approval workflow group is set to **Yes**. • **Cancel** - Used when you want to avail the reason while canceling an approval transaction. The system will then list the reason in the respective field of the **Rejection/Cancelation Reason** screen. **Note:** The **Rejection/Cancelation Reason** screen appears when you click the **Revert to Original** button in the **Comparison: New versus Existing** screen. • **Deal General** - Used when you want to avail the reason while adding comments at the deal level. The system will then list the	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	reason in the respective field of the **Deal Logs and Comments** screen. **Note:** The **Deal Logs and Comments** screen appears when you click the **Deal Log** link in the **Deal Information** screen. • **Deal Reject** - Used when you want to avail the reason while rejecting a deal. The system will then list the reason in the respective field of the **Deal Rejection** screen. **Note:** The **Deal Rejection** screen appears when you click the **Reject Deal** button in the **Deal Information** screen. • **Deal Return** - Used when you want to avail the reason while requesting the submitter to resubmit the deal. The system will then list the reason in the respective field of the **Deal Approval Return To Submitter** screen. **Note:** The **Deal Approval Return To Submitter** screen appears when you click the **Resubmit Deal** button in the **Deal Information** screen. • **Reject** - Used when you want to avail the reason while rejecting an approval transaction. The system will then list the reason in the respective field of the **Rejection/Cancelation Reason** screen. **Note:** The **Rejection/Cancelation Reason** screen appears when you click the **Return to Submitter** button in the **Comparison: New versus Existing** screen. **Note:** The **Approve**, **Cancel**, and **Reject** reason categories are applicable only for the **Approval Workflow** feature. However, the **Deal General**, **Deal Reject**, and **Deal Return** reason categories are applicable only for the **Deal Pricing Management** feature.	

6. Modify the required details in the **Main** section.
7. Click **Save**.
   The changes made to the approval workflow reason are saved.

Related Topics

For more information on...	See...
Approval Workflow Reason screen	Approval Workflow Reason on page 1069

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For more information on...	See...
Approval Workflow Reason screen	Approval Workflow Reason (Used for Viewing) on page 1072
Approval Workflow Reason zone	Approval Workflow Reason on page 1073

Deleting an Approval Workflow Reason

Procedure

To delete an approval workflow reason:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **A** and then click **Approval Workflow Reason**.
   The **Approval Workflow Reason** screen appears.
3. If required, filter the approval workflow reasons in the **Approval Workflow Reason** screen.
4. In the **Approval Workflow Reason List** zone, click the link in the **Description** column corresponding to the approval *w*orkflow reason that you want to delete.
   The **Approval Workflow Reason** screen appears.
5. Click the **Delete** button in the **Approval Workflow Reason** zone.
   A message appears confirming whether you want to delete the approval workflow reason.
6. Click **OK**.
   The approval workflow reason is deleted.

Related Topics

For more information on...	See...
Approval Workflow Reason screen	Approval Workflow Reason on page 1069
Approval Workflow Reason screen	Approval Workflow Reason (Used for Viewing) on page 1072
Approval Workflow Reason zone	Approval Workflow Reason on page 1073

Chapter 14

Rules Engine

Topics:

- Rule Type (Used for Searching)
- Rule Type (Used for Viewing)
- Rule
- Rule
- Rule Check

A rules engine executes one or more business rules in a runtime production environment. It allows you to define, execute, and maintain these business rules separately from the application code. You can then use these business rules in any program to facilitate operational decisions at runtime. For example, you might use business rules in the Collection module to decide the collection strategy or in the Banking module to derive charges codes or price items for the transaction.

A rules engine allows you to classify these rules using the rule type. It also allows you to define the relationship between two or more rules and set the priority for each rule. When a calling program invokes these rules using the rule type, all effective rules with the specified rule type are executed, starting with the rule having highest priority. For example, a rule with the priority 10 will be executed before a rule with the priority 20.

Each rule contains one or more criteria. Depending on whether the criteria is satisfied, the system either executes the next criteria or indicates whether the rule is true or false. The rules engine allows you to define what should happen when the rule is true or false. In both the cases, you can enforce the system to either:

- Execute any dependent rule
- Execute a rule with the same rule type having lower priority
- Return the output parameters and their values to the calling program

You can define a criteria for a rule only using the input parameters that are defined for the rule type. Also, when the rule is true, you can only return the output parameters that are defined for the rule type to the calling programs. Therefore, in case you want to use any field in the rule, you have to associate it with the rule type as an input or output parameter.

A rules engine also allows you to execute preprocessing and postprocessing algorithms. A preprocessing algorithm is triggered before executing any criteria in the rule. It pre-processes the input parameters and then returns processed values against which the criteria is validated. A postprocessing algorithm is triggered after executing all criteria in the rule. It post-processes the output parameters and returns the updated values to the calling programs or dependent rules.

Oracle Revenue Management and Billing provides you with the Rule Check utility. It allows you to validate whether rules defined with a specific rule type get executed as expected. On validating, it indicates the sequence in which the rules were executed, the total execution time, and displays the output parameters of the rule that was successfully executed.

Normally, in the Transaction Feed Management feature, the transaction legs are created using the output parameters of the rule where the criteria returns **Rule Is True** and the rule true action is set to **Success**. Oracle Revenue Management

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

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

Note: The transaction legs with the same account ID, price item, variance parameter or price item parameters, and processing date are considered as duplicate transaction legs.

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Rule Type (Used for Searching)

A rule type can be used for defining rule based auto pay instructions or business rules for mapping transactions with the price items. If you want to use the rule type for defining rule based auto pay instructions, you must set the **Rule Type Usage** field to **Auto Pay**. However, if you want to use the rule type for defining business rules for mapping transactions with the price items, you must leave the **Rule Type Usage** field blank.

It is the rule type which helps the system to determine:

- Fields that can be used while defining criteria for business rules or rule based auto pay instructions
- Entities whose characteristics can be used while defining criteria for rule based auto pay instructions
- Algorithms which must be used for deriving information from the financial transaction
- Maximum number of rules that can be defined when the rule based auto pay instruction is created using the rule type

The **Rule Type** screen allows you to search for a rule type using various search criteria. It also allows you to define, edit, delete, and copy a rule type. It contains the following zone:

- Search Rule Type on page 1079

Search Rule Type

The **Search Rule Type** zone allows you to search for a rule type using various search criteria. It contains the following two sections:

- **Search Criteria** - The **Search Criteria** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Rule Type	Used to search a particular rule type.	No
Description	Used to search rule types with a particular description.	No
Rule Type Usage	Used to indicate whether you want to search rule types which are used for defining rule based auto pay instructions or which are used for defining business rules for mapping transactions with the price items. The valid value is: • ASO Billing Line Item Eligibility • ASO Billing Markup/Down Eligibility • • Auto Pay **Note:** If you want to search rule types which are used for defining business rules for mapping transactions with the price items, you must leave this field blank.	No

- **Search Results** - On clicking the **Search** button, the search results appear based on the specified search criteria. The **Search Results** section contains the following columns:

Column Name	Column Description
Rule Type	Displays the rule type.
Description	Displays the description of the rule type.
Rule Type Usage	Indicates whether the rule type is used for defining rule based auto pay instructions or for defining business rules for mapping transactions with the price items.

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Column Name	Column Description
View	On clicking the **View** (🔗) icon, the **Rule Type** screen appears where you can view the details of the rule type.
Edit	On clicking the **Edit** (✎) icon, the **Rule Type** screen appears where you can edit the details of the rule type.
Delete	On clicking the **Delete** (🗑) icon, you can delete the rule type.
	Note: You can delete a rule type when the rule based auto pay instructions or business rules are not yet defined using the rule type.
Duplicate	On clicking the **Duplicate** (⧉) icon, the **Rule Type** screen appears where you can create a new rule type using an existing rule type.

Related Topics

For more information on...	See...
How to search for a rule type	Searching for a Rule Type on page 1080
How to view the details of a rule type	Viewing the Rule Type Details on page 1093
How to edit a rule type	Editing a Rule Type on page 1087
How to delete a rule type	Deleting a Rule Type on page 1089
How to copy a rule type	Copying a Rule Type on page 1089

Searching for a Rule Type

Prerequisites

To search for a rule type, you should have:

- Values defined for the **C1_RULE_USAGE_FLG** lookup field

Procedure

To search for a rule type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **R** and then click **Rule Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Rule Type** sub-menu.
   The **Rule Type** screen appears.
4. Enter the search criteria in the **Search Rule Type** zone.

   Note: ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.
5. Click **Search**.
   A list of rule types that meet the search criteria appears in the **Search Results** section.

Related Topics

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For more information on...	See...
Rule Type screen	Rule Type (Used for Searching) on page 1079
Search Rule Type zone	Search Rule Type on page 1079

Defining a Rule Type

Prerequisites

To define a rule type, you should have:

- Values defined for the **C1_RULE_USAGE_FLG** lookup field
- Values defined for the **RULE_TYPE_CAT_FLG** lookup field

Procedure

To define a rule type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **R** and then click **Rule Type**.
   A sub-menu appears.
3. Click the **Add** option from the **Rule Type** sub-menu.

   The **Rule Type** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details about the rule type.
   - **Input and Output Parameters** - Used to define input and output parameters for the rule type.
   - **Rule Criteria Characteristic Entities** - Used to indicate the entities whose characteristics you can use while defining rule based auto pay instructions using the rule type.

     Note: This section appears when you select the **Auto Pay** option from the **Rule Type Usage** list.
   - **Rule Criteria Derivation Algorithms** - Used to attach algorithms which you want to use for deriving the following from the financial transaction:
     - Values of all those fields (such as, policy number, plan number, or price item) which are selected in the rule type as the input and output parameters
     - Characteristics of all those entities which are selected in the rule type as the rule criteria characteristic entities

     Note: This section appears when you select the **Auto Pay** option from the **Rule Type Usage** list.

   The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Rule Type	Used to specify the rule type.	Yes
Rule Type Usage	Used to indicate whether you want to use the rule type for defining rule based auto pay instructions or for defining business rules for mapping transactions with the price items. The valid values are: • Line Item Eligibility • Mark Up/Mark Down Eligibility • Domestic Provider Eligibility • Auto Pay • File Upload Interface • Price Item Eligibility	No

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Field Name	Field Description	Mandatory (Yes or No)
	• Related Pricing Rule Type Eligibility **Note:** If you want to use the rule type for defining rule based auto pay instructions, you must set the rule type usage to **Auto Pay**. However, if you want to use the rule type for defining business rules for mapping transactions with the price items, you must leave this field blank.	
Description	Used to specify the description for the rule type.	Yes
Maximum Rule Count	Used to indicate the maximum number of rules that can be defined when the rule based auto pay instruction is created using the rule type. **Note:** This field appears when you select the **Auto Pay** option from the **Rule Type Usage** list. The maximum rule count cannot be less than or equal to zero.	No
Rule Type Category	Used to indicate whether you want to create a field based or parameter based rule type. The valid values are: • Field Based • Parameter Based **Note:** This field appears when you select the **Price Item Eligibility** or **Related Pricing Rule Type Eligibility** option from the **Rule Type Usage** list. By default the value of this option type is set to **Field Based**.	No

Tip: Alternatively, you can access this screen by clicking the **Add** button in the **Page Title** area of the **Rule Type** screen.

4. Enter the required details in the **Main** section.
5. Define input and output parameters for the rule type.

Note: On selecting the **Parameter Based** option from the **Rule Type Category** list, the **Parameter** column appears in the **Input and Output Parameters** section. Here, you can specify a parameter whether the parameter usage is set to **Rule Eligibility Criteria**.

6. Associate one or more characteristic entities with the rule type, if required.

Note: You must specify at least one input or output parameter when you want to use the rule type for defining business rules for mapping transactions with the price items. However, you must specify at least one input or output parameter or associate at least one characteristic entity when you want to use the rule type for defining rule based auto pay instructions.

7. Associate the rule criteria derivation algorithm when you want to use the rule type for defining rule based auto *p*ay instructions.

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> **Note:** You must associate the rule criteria derivation algorithm with the rule type when the **Rule Type Usage** field is set to **Auto Pay**.

8. Click **Save**.
   The rule type is defined.

Related Topics

For more information on...	See...
How to define input and output parameters for a rule type	Defining Input and Output Parameters for a Rule Type on page 1083
How to associate a characteristic entity with a rule type	Associating a Characteristic Entity with a Rule Type on page 1085
How to associate an algorithm with a rule type	Associating an Algorithm with a Rule Type on page 1086

Defining Input and Output Parameters for a Rule Type

Prerequisites

To define the input and output parameters for a rule type, you should have:

- Fields defined in the application
- Field search zone defined in the application

Procedure

To define the input and output parameters for a rule type:

1. Ensure that the **Input and Output Parameters** section is expanded when you are defining, editing, *o*r copying a rule type.

   The **Input and Output Parameters** section contains the following fields in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Sequence	Used to specify the sequence number for the input or output parameter.	Yes
Field	Used to indicate the field that you want to use as the input or output parameter while defining a business rule. **Note:** The **Search** (🔍) icon appears corresponding to this field. On clicking the **Search** icon, the **Field Search** window appears. On specifying the field, the description of the field appears corresponding to the **Field**.	Yes
Parameter	Used to indicate the parameter that you want to use as the input or output parameter while defining a business rule.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The **Search** (🔍) icon appears corresponding to this field. On clicking the **Search** icon, the **Parameter Search** window appears. On specifying the parameter, the description of the parameter appears corresponding to the **Parameter** field. This field appears when you select the **Parameter Based** option from the **Rule Type Category** field.	
Rule Input/Output	Used to indicate whether you want to use the field as input and/or output parameter while defining a business rule. The valid values are: • Input • Input and Output • Output **Note:** By default, the **Input** option is selected. This field appears when you do not select the **Auto Pay** option from the **Rule Type Usage** list.	Yes
Search Zone	Used to indicate the search zone that you want to use for searching the field value while defining criteria for rule based auto pay instructions. **Note:** The **Search** (🔍) icon appears corresponding to this field. On clicking the **Search** icon, the **Zone Search** window appears. This field appears when you select the **Auto Pay** option from the **Rule Type Usage** list.	No

2. Enter the required details in the **Input and Output Parameters** section.

Note:

At present, the following fields are only supported while defining a rule type where the **Rule Type Usage** field is set to **Auto Pay**:

- Policy Number
- Plan Number
- Price Item

If you want to use any other field while defining criteria for rule based auto pay instructions, the implementation team will have to develop the custom logic to implement the requirement.

3. If you want to define more than one input or output parameter for the rule type, click the **Add** (+) icon and *t*hen repeat step 2.

Note: However, if you want to remove an input or output parameter from the rule type, click the **Delete** (🗑) icon corresponding to the parameter.

Related Topics

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For more information on...	See...
How to define a rule type	Defining a Rule Type on page 1081
How to edit a rule type	Editing a Rule Type on page 1087
How to copy a rule type	Copying a Rule Type on page 1089

Associating a Characteristic Entity with a Rule Type

Prerequisites

To associate a characteristic entity with a rule type, you should have:

- Values defined for the **RULE_CRITERIA_ENTITY_FLG** lookup field

Procedure

To associate a characteristic entity with a rule type:

1. Ensure that the **Rule Criteria Characteristic Entities** section is expanded when you are defining, *e*diting, or copying a rule type.

   The **Rule Criteria Characteristic Entities** section contains the following fields in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Characteristic Entity	Used to indicate the entity whose characteristics you want to use while defining criteria for rule based auto pay instructions. The valid values are: • Adjustment • Billable Charge • Policy • Policy Plan • Price Item **Note:** At present, the characteristics of the above listed entities are only supported while defining criteria for rule based auto pay instructions. If you want to use characteristics of any other entity, the implementation team will have to develop the custom logic to implement the requirement.	Yes

   Note: This section appears when you select the **Auto Pay** option from the **Rule Type Usage** list.

2. Enter the required details in the **Rule Criteria Characteristic Entities** section.
3. If you want to associate more than one characteristic entity with the rule type, click the **Add** (+) icon and then repeat step 2.

   Note: However, if you want to remove a characteristic entity from the rule type, click the **Delete** (🗑) icon corresponding to the characteristic entity.

Related Topics

For more information on...	See...
How to define a rule type	Defining a Rule Type on page 1081
How to edit a rule type	Editing a Rule Type on page 1087

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For more information on...	See...
How to copy a rule type	Copying a Rule Type on page 1089

Associating an Algorithm with a Rule Type

Prerequisites

To associate an algorithm with a rule type, you should have:

- Rule criteria derivation algorithm defined using the **C1-APRCRIDER** algorithm type

Procedure

To associate an algorithm with a rule type:

1. Ensure that the **Rule Criteria Derivation Algorithms** section is expanded when you are defining, *e*diting, or copying a rule type.

   The **Rule Criteria Derivation Algorithms** section contains the following fields in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Sequence	Used to indicate the order in which the algorithm should be executed.	Yes
Algorithm	Used to attach an algorithm which you want to use for deriving the following from the financial transaction: • Values of all those fields (such as, policy number, plan number, or price item) which are selected in the rule type as the input and output parameters • Characteristics of all those entities which are selected in the rule type as the rule criteria characteristic entities **Note:** The **Search** (🔍) icon appears corresponding to this field. On clicking the **Search** icon, the **Algorithm Search** window appears.	Yes

   Note: This section appears when you select the **Auto Pay** option from the **Rule Type Usage** list.

2. Enter the required details in the **Rule Criteria Derivation Algorithms** section.
3. If you want to associate more than one algorithm with the rule type, click the **Add** (+) icon and then repeat step 2.

   Note: However, if you want to remove an algorithm from the rule type, click the **Delete** (🗑) icon corresponding to the algorithm.

Related Topics

For more information on...	See...
How to define a rule type	Defining a Rule Type on page 1081
How to edit a rule type	Editing a Rule Type on page 1087
How to copy a rule type	Copying a Rule Type on page 1089

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Editing a Rule Type

Procedure

To edit a rule type:

1. Search for the rule type in the **Rule Type** screen.
2. In the **Search Results** section, click the **Edit** (✎) icon in the **Edit** column corresponding to *t*he rule type whose details you want to edit.

   The **Rule Type** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details about the rule type.
   - **Input and Output Parameters** - Used to define input and output parameters for the rule type.
   - **Rule Criteria Characteristic Entities** - Used to indicate the entities whose characteristics you can use while defining rule based auto pay instructions using the rule type.

     Note: This section appears when you select the **Auto Pay** option from the **Rule Type Usage** list.
   - **Rule Criteria Derivation Algorithms** - Used to attach algorithms which you want to use for deriving the following from the financial transaction:
     - Values of all those fields (such as, policy number, plan number, or price item) which are selected in the rule type as the input and output parameters
     - Characteristics of all those entities which are selected in the rule type as the rule criteria characteristic entities

     Note: This section appears when you select the **Auto Pay** option from the **Rule Type Usage** list.

   The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Rule Type	Displays the rule type. **Note:** This is a read-only field.	Not applicable
Rule Type Usage	Indicates whether the rule type is used for defining rule based auto pay instructions or for defining business rules for mapping transactions with the price items. The valid values are: • Line Item Eligibility • Mark Up/Mark Down Eligibility • Domestic Provider Eligibility • Auto Pay • File Upload Interface • Price Item Eligibility • Related Pricing Rule Type Eligibility **Note:** This is a read-only field.	Not applicable
Description	Used to specify the description for the rule type.	Yes
Maximum Rule Count	Used to indicate the maximum number of rules that can be defined when the rule based auto pay instruction is created using the rule type.	No

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Field Name	Field Description	Mandatory (Yes or No)
	Note: This field appears when the **Rule Type Usage** field is set to **Auto Pay**. The maximum rule count cannot be less than or equal to zero. You cannot reduce the maximum rule count when one or more auto pay instructions contain the specified number of rules.	
Rule Type Category	Used to indicate whether you want to create a field based or parameter based rule type. The valid values are: • Field Based • Parameter Based	No
	Note: This field appears when you have selected the **Price Item Eligibility** or **Related Pricing Rule Type Eligibility** option from the **Rule Type Usage** list while defining a rule type. This is a read-only field.	

Tip: Alternatively, you can edit the details of a rule type by clicking the **Edit** link in the **Rule Type** zone.

3. Modify the required details in the **Main** section.
4. Define, edit, or remove input or output parameters from the rule type, if required.

Note: You cannot edit or remove an input or output parameter from the rule type when it is used for defining criteria in a business rule or rule based auto pay instruction.

5. Associate or remove one or more characteristic entities from the rule type, if required.

Note:

You must specify at least one input or output parameter when you want to use the rule type for defining business rules for mapping transactions with the price items. However, you must specify at least one input or output parameter or associate at least one characteristic entity when you want to use the rule type for defining rule based auto pay instructions.

You cannot remove a characteristic entity from the rule type when it is used for defining criteria in a rule based auto pay instruction.

6. Associate or remove one or more rule criteria derivation algorithm from the rule type, if required.

Note: You must associate the rule criteria derivation algorithm with the rule type when the **Rule Type Usage** field is set to **Auto Pay**.

7. Click **Save**.
   The changes made to the rule type are saved.

Related Topics

For more information on...	See...
How to search for a rule type	Searching for a Rule Type on page 1080

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For more information on...	See...
How to define input and output parameters for a rule type	Defining Input and Output Parameters for a Rule Type on page 1083
How to associate a characteristic entity with a rule type	Associating a Characteristic Entity with a Rule Type on page 1085
How to associate an algorithm with a rule type	Associating an Algorithm with a Rule Type on page 1086
Rule Type zone	Rule Type on page 1092

Deleting a Rule Type

Procedure

To delete a rule type:

1. Search for the rule type in the **Rule Type** screen.
2. In the **Search Results** section, click the **Delete** (🗑) icon in the **Delete** column corresponding to *t*he rule type that you want to delete.
   A message appears confirming whether you want to delete the rule type.

   Note: You can delete a rule type when the rule based auto pay instructions or business rules are not yet defined using the rule type.
3. Click **OK**.
   The rule type is deleted.

Related Topics

For more information on...	See...
How to search for a rule type	Searching for a Rule Type on page 1080

Copying a Rule Type

Instead of creating a rule type from scratch, you can create a new rule type using an existing rule type. This is possible through copying a rule type. On copying a rule type, the details including the input and output parameters, rule criteria characteristic entities, and rule criteria derivation algorithms are copied to the new rule type. You can then edit the details, if required.

Prerequisites

To copy a rule type, you should have:

- Rule type (whose copy you want to create) defined in the application
- Values defined for the **C1_RULE_USAGE_FLG** lookup field
- Values defined for the **RULE_TYPE_CAT_FLG** lookup field

Procedure

To copy a rule type:

1. Search for the rule type in the **Rule Type** screen.
2. In the **Search Results** section, click the **Copy** (📋) icon in the **Copy** column corresponding to *t*he rule type whose copy you want to create.

   The **Rule Type** screen appears. It contains the following sections:

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- **Main** - Used to specify basic details about the rule type.
- **Input and Output Parameters** - Used to define input and output parameters for the rule type.
- **Rule Criteria Characteristic Entities** - Used to indicate the entities whose characteristics you can use while defining rule based auto pay instructions using the rule type.

Note: This section appears when you select the **Auto Pay** option from the **Rule Type Usage** list.

- **Rule Criteria Derivation Algorithms** - Used to attach algorithms which you want to use for deriving the following from the financial transaction:
  - Values of all those fields (such as, policy number, plan number, or price item) which are selected in the rule type as the input and output parameters
  - Characteristics of all those entities which are selected in the rule type as the rule criteria characteristic entities

Note: This section appears when you select the **Auto Pay** option from the **Rule Type Usage** list.

The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Rule Type	Used to specify the rule type.	Yes
Rule Type Usage	Used to indicate whether you want to use the rule type for defining rule based auto pay instructions or for defining business rules for mapping transactions with the price items. The valid values are: • Line Item Eligibility • Mark Up/Mark Down Eligibility • Domestic Provider Eligibility • Auto Pay • File Upload Interface • Price Item Eligibility • Related Pricing Rule Type Eligibility **Note:** If you want to use the rule type for defining rule based auto pay instructions, you must set the rule type usage to **Auto Pay**. However, if you want to use the rule type for defining business rules for mapping transactions with the price items, you must leave this field blank.	No
Description	Used to specify the description for the rule type.	Yes
Maximum Rule Count	Used to indicate the maximum number of rules that can be defined when the rule based auto pay instruction is created using the rule type. **Note:** This field appears when you select the **Auto Pay** option from the **Rule Type Usage** list. The maximum rule count cannot be less than or equal to zero.	No
Rule Type Category	Used to indicate whether you want to create a field based or parameter based rule type. The valid values are: • Field Based	No

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Field Name	Field Description	Mandatory (Yes or No)
	• Parameter Based **Note:** This field appears when you select the **Price Item Eligibility** or **Related Pricing Rule Type Eligibility** option from the **Rule Type Usage** list. By default the value of this option type is set to **Field Based**.	

3. Enter the required details in the **Main** section.
4. Define, edit, or remove input or output parameters from the rule type, if required.

Note: On selecting the **Parameter Based** option from the **Rule Type Category** list, the **Parameter** column appears in the **Input and Output Parameters** section. Here, you can specify a parameter whether the parameter usage is set to **Rule Eligibility Criteria**.

5. Associate or remove one or more characteristic entities from the rule type, if required.

Note: You must specify at least one input or output parameter when you want to use the rule type for defining business rules for mapping transactions with the price items. However, you must specify at least one input or output parameter or associate at least one characteristic entity when you want to use the rule type for defining rule based auto pay instructions.

6. Associate the rule criteria derivation algorithm when you want to use the rule type for defining rule based auto pay instructions.

Note: You must associate the rule criteria derivation algorithm with the rule type when the **Rule Type Usage** field is set to **Auto Pay**.

7. Click **Save**.
   The new rule type is defined.

Related Topics

For more information on...	See...
How to search for a rule type	Searching for a Rule Type on page 1080
How to define input and output parameters for a rule type	Defining Input and Output Parameters for a Rule Type on page 1083
How to associate a characteristic entity with a rule type	Associating a Characteristic Entity with a Rule Type on page 1085
How to associate an algorithm with a rule type	Associating an Algorithm with a Rule Type on page 1086

Rule Type (Used for Viewing)

The **Rule Type** screen allows you to view the details of the rule type. It contains the following zone:

- Rule Type on page 1092

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Rule Type

The **Rule Type** zone displays the details of the rule type. It contains the following sections:

- **Main** - Displays basic information about the rule type. It contains the following fields:

Field Name	Field Description
Rule Type	Displays the rule type.
Rule Type Usage	Indicates whether the rule type is used for defining rule based auto pay instructions or for defining business rules for mapping transactions with the price items. The valid values are: • Line Item Eligibility • Mark Up/Mark Down Eligibility • Domestic Provider Eligibility • Auto Pay • File Upload Interface • Price Item Eligibility • Related Pricing Rule Type Eligibility **Note:** This field appears when the rule type usage is specified while defining the rule type.
Description	Displays the description of the rule type.
Maximum Rule Count	Indicates the maximum number of rules that can be defined when the rule based auto pay instruction is created using the rule type. **Note:** This field appears when the **Rule Type Usage** field is set to **Auto Pay**.
Rule Type Category	Indicates whether you want to create a field based or parameter based rule type. The valid values are: • Field Based • Parameter Based **Note:** This field appears when you select the **Price Item Eligibility** or **Related Pricing Rule Type Eligibility** option from the **Rule Type Usage** list while defining the rule type.

- **Input and Output Parameters** - Lists the input and output parameters defined for the rule type. It contains the following columns:

Column Name	Column Description
Sequence	Displays the sequence number of the input or output parameter.
Field	Indicates the field which is used as the input or output parameter.
Parameter	Indicates the parameter that you want to use as the input or output parameter.
Rule Input/Output	Indicates whether the field is used as input and/or output parameter while defining a business rule.
Search Zone	Indicates the search zone that is used for searching the field value while defining criteria for rule based auto pay instructions.

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Column Name	Column Description
	Note: It has a link. On clicking the link, the **Zone** screen appears where you can view the details of the zone.

- **Rule Criteria Characteristic Entities** - This section contains the following column:

Column Name	Column Description
Characteristic Entity	Indicates the entity whose characteristics can be used while defining criteria for rule based auto pay instructions. The valid values are: • Adjustment • Billable Charge • Policy • Policy Plan • Price Item

- **Rule Criteria Derivation Algorithms** - Lists the algorithms attached to the rule type. It contains the following columns:

Column Name	Column Description
Sequence	Indicates the order in which the algorithm should be executed.
Algorithm	Indicates the algorithm attached to the rule type which derives the following from the financial transaction: • Values of all those fields (such as, policy number, plan number, or price item) which are selected in the rule type as the input and output parameters • Characteristics of all those entities which are selected in the rule type as the rule criteria characteristic entities

Note: The **Rule Criteria Characteristic Entities** and **Rule Criteria Derivation Algorithms** sections appear when the **Rule Type Usage** field is set to **Auto Pay**.

You can edit the details of the rule type by clicking the **Edit** link in the upper-right corner of this zone.

Related Topics

For more information on...	See...
How to edit a rule type	Editing a Rule Type on page 1087

Viewing the Rule Type Details

Procedure

To view the details of a rule type:

1. Search for the rule type in the **Rule Type** screen.
2. In the **Search Results** section, click the **View** (🔗) icon in the **View** column corresponding to the *r*ule type whose details you want to view.
   The **Rule Type** screen appears.
3. View the details of the rule type in the **Rule Type** zone.

Related Topics

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For more information on...	See...
How to search for a rule type	Searching for a Rule Type on page 1080
Rule Type screen	Rule Type (Used for Viewing) on page 1091
Rule Type zone	Rule Type on page 1092

Editing a Rule Type

Procedure

To edit a rule type:

1. Search for the rule type in the **Rule Type** screen.
2. In the **Search Results** section, click the **Edit** (✎) icon in the **Edit** column corresponding to *t*he rule type whose details you want to edit.

   The **Rule Type** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details about the rule type.
   - **Input and Output Parameters** - Used to define input and output parameters for the rule type.
   - **Rule Criteria Characteristic Entities** - Used to indicate the entities whose characteristics you can use while defining rule based auto pay instructions using the rule type.

     Note: This section appears when you select the **Auto Pay** option from the **Rule Type Usage** list.

   - **Rule Criteria Derivation Algorithms** - Used to attach algorithms which you want to use for deriving the following from the financial transaction:
     - Values of all those fields (such as, policy number, plan number, or price item) which are selected in the rule type as the input and output parameters
     - Characteristics of all those entities which are selected in the rule type as the rule criteria characteristic entities

     Note: This section appears when you select the **Auto Pay** option from the **Rule Type Usage** list.

   The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Rule Type	Displays the rule type. **Note:** This is a read-only field.	Not applicable
Rule Type Usage	Indicates whether the rule type is used for defining rule based auto pay instructions or for defining business rules for mapping transactions with the price items. The valid values are: • Line Item Eligibility • Mark Up/Mark Down Eligibility • Domestic Provider Eligibility • Auto Pay • File Upload Interface • Price Item Eligibility • Related Pricing Rule Type Eligibility **Note:** This is a read-only field.	Not applicable

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Field Name	Field Description	Mandatory (Yes or No)
Description	Used to specify the description for the rule type.	Yes
Maximum Rule Count	Used to indicate the maximum number of rules that can be defined when the rule based auto pay instruction is created using the rule type. **Note:** This field appears when the **Rule Type Usage** field is set to **Auto Pay**. The maximum rule count cannot be less than or equal to zero. You cannot reduce the maximum rule count when one or more auto pay instructions contain the specified number of rules.	No
Rule Type Category	Used to indicate whether you want to create a field based or parameter based rule type. The valid values are: • Field Based • Parameter Based **Note:** This field appears when you have selected the **Price Item Eligibility** or **Related Pricing Rule Type Eligibility** option from the **Rule Type Usage** list while defining a rule type. This is a read-only field.	No

Tip: Alternatively, you can edit the details of a rule type by clicking the **Edit** link in the **Rule Type** zone.

3. Modify the required details in the **Main** section.
4. Define, edit, or remove input or output parameters from the rule type, if required.

Note: You cannot edit or remove an input or output parameter from the rule type when it is used for defining criteria in a business rule or rule based auto pay instruction.

5. Associate or remove one or more characteristic entities from the rule type, if required.

Note:

You must specify at least one input or output parameter when you want to use the rule type for defining business rules for mapping transactions with the price items. However, you must specify at least one input or output parameter or associate at least one characteristic entity when you want to use the rule type for defining rule based auto pay instructions.

You cannot remove a characteristic entity from the rule type when it is used for defining criteria in a rule based auto pay instruction.

6. Associate or remove one or more rule criteria derivation algorithm from the rule type, if required.

Note: You must associate the rule criteria derivation algorithm with the rule type when the **Rule Type Usage** field is set to **Auto Pay**.

7. Click **Save**.
   The changes made to the rule type are saved.

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Related Topics

For more information on...	See...
How to search for a rule type	Searching for a Rule Type on page 1080
How to define input and output parameters for a rule type	Defining Input and Output Parameters for a Rule Type on page 1083
How to associate a characteristic entity with a rule type	Associating a Characteristic Entity with a Rule Type on page 1085
How to associate an algorithm with a rule type	Associating an Algorithm with a Rule Type on page 1086
Rule Type zone	Rule Type on page 1092

Rule

The **Rule** screen allows you to define, edit, delete, and copy a rule. This screen consists of the following zones:

- Search Rule on page 1096

Search Rule

The **Search Rule** zone allows you to search for a rule. This zone contains the following two sections:

- **Search Criteria** - The **Search Criteria** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Rule	Used to specify the rule code.	No
Rule Type	Used to specify the type of rule.	No
Description	Used to specify the description for the rule.	No
Rule Priority	Used to specify the priority of the rule.	No
Effective Start Date	Used to specify the date from when the rule is effective.	No

- **Search Results** - On clicking the **Search** button, the search results appear based on the specified search criteria. The **Search Results** section contains the following columns:

Column Name	Column Description
Rule Priority	Displays the priority of the rule.
Rule	Displays the rule code.
Description	Displays the description of the rule.
Rule Type	Displays the type of rule.
Effective Start Date	Displays the date from when the rule is effective.
Effective End Date	Displays the date till when the rule is effective.
Pre-Processing Algorithm	Indicates the algorithm that will be triggered before executing the criteria in the rule. It pre-processes the input parameters and then returns processed values against which the criteria is validated.

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Column Name	Column Description
Post-Processing Algorithm	Indicates the algorithm that will be triggered when the rule is true. It post-processes the output parameters and returns the updated values to the calling programs or dependent rules.
View	On clicking the **View** (🔗) icon, the **View Rule** screen appears where you can view the details of the rule.
Edit	On clicking the **Edit** (✎) icon, the **Edit Rule** screen appears where you can edit the details of the rule.
Delete	On clicking the **Delete** (🗑) icon, you can delete the rule.
	Note: You can delete a rule only if it is not used.
Duplicate	On clicking the **Duplicate** (⧉) icon, the **Copy Rule** screen appears where you can create a rule using an existing rule.

You can create a new rule by clicking the **Add** link in the upper right corner of this zone.

Related Topics

For more information on...	See...
How to search for a rule	Searching for a Rule on page 1097
How to view the details of a rule	Viewing the Rule Details on page 1098
How to define a rule	Defining a Rule on page 1098
How to edit a rule	Editing a Rule on page 1103
How to delete a rule	Deleting a Rule on page 1108
How to copy a rule	Copying a Rule on page 1109

Searching for a Rule

Procedure

To search for a rule:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **R** and then click **Rule**.
   A sub-menu appears.
3. Click the **Search** option from the **Rule** sub-menu.
   The **Rule** screen appears.
4. Enter the search criteria in the **Search** zone.

> **Note:** ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.

5. Click **Search**.

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A list of rules that meet the search criteria appears in the **Search Results** section.

Related Topics

For more information on...	See...
Rule screen	Rule on page 1096
Search zone	Search Rule on page 1096

Viewing the Rule Details

Procedure

To view the details of a rule:

1. Search for the rule in the **Rule** screen.
2. In the **Search Results** section, click the **View** (🔗) icon in the **View** column corresponding to the rule whose *d*etails you want to view.
   The **View Rule** screen appears.
3. View the details of the rule in the **Rule Information** zone.

Related Topics

For more information on...	See...
View Rule screen	Rule on page 1114
Rule Information zone	Rule Information on page 1114
How to search for a rule	Searching for a Rule Type on page 1080

Defining a Rule

Prerequisites

To define a rule, you should have:

- Rule types defined in the application
- Pre-processing and post-processing algorithms, dependent rules, and parameters defined in the application in case you want to use any of them

Procedure

To define a rule:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **R** and then click **Rule**.
   A sub-menu appears.
3. Click the **Add** option from the **Rule** sub-menu.

   The **Rule** screen appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Rule	Used to specify the rule code.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
Rule Type	Used to specify the type of rule.	Yes
Description	Used to specify the description for the rule.	Yes
Rule Priority	Used to specify the priority of the rule. **Note:** You cannot define two rules with the same rule type and priority in the same duration.	Yes
Effective Start Date	Used to specify the date from when the rule is effective.	Yes
Effective End Date	Used to specify the date till when the rule is effective. **Note:** The effective end date cannot be earlier than the effective start date.	No
Pre-Processing Algorithm	Used to specify the algorithm that will be triggered before executing the criteria in the rule. It pre-processes the input parameters and then returns processed values against which the criteria is validated. **Note:** The **Search** (🔍) icon appears corresponding to this field. On clicking the **Search** icon, the **Algorithm Search** window appears. On specifying the algorithm, the description of the algorithm appears corresponding to the **Pre-Processing Algorithm** field.	No
Post-Processing Algorithm	Used to specify the algorithm that will be triggered when the rule is true. It post-processes the output parameters and returns the updated values to the calling programs or dependent rules. **Note:** The **Search** (🔍) icon appears corresponding to this field. On clicking the **Search** icon, the **Algorithm Search** window appears. On specifying the algorithm, the description of the algorithm appears corresponding to the **Post-Processing Algorithm** field.	No
Rule True Action	Used to indicate what should happen when all conditions in the rule are satisfied and returns **Rule is True**. The valid values are: • **Next Dependent Rule** - Used to indicate that the dependent rule should be executed when the rule is true. • **Next Rule by Priority** - Used to indicate that the rule of the same rule type having lower priority should be executed when the rule is true. • **Success** - Used to indicate that no more rules should be executed when the rule is true. The output parameters and their values are returned to the calling programs.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
Dependent Rule	Used to specify the next dependent rule that must be executed when **Next Dependent Rule** is selected from the **Rule True Action** list.	Yes (Conditional) **Note:** This field is required when you select **Next Dependent Rule** from the **Rule True Action** list.
Rule False Action	Used to indicate what should happen when any of the criteria in the rule is not satisfied and returns **Rule is False**. The valid values are: • **Next Dependent Rule** - Used to indicate that the dependent rule should be executed when the rule is false. • **Next Rule by Priority** - Used to indicate that the rule of the same rule type having lower priority should be executed when the rule is false. • **Success** - Used to indicate that no more rules should be executed when the rule is false. The output parameters and their values are returned to the calling programs.	Yes
Dependent Rule	Used to specify the next dependent rule that must be executed when **Next Dependent Rule** is selected from the **Rule False Action** list.	Yes (Conditional) **Note:** This field is required when you select **Next Dependent Rule** from the **Rule False Action** list.

In addition, it contains the following two sections:

- **Rule Output Parameters** - Used to specify the output parameters that must be returned to the calling programs or dependent rules when all conditions in the rule are satisfied. This section contains the following columns:

Column Name	Column Description	Mandatory (Yes or No)
Parameter Name	Used to specify the parameter. **Note:** For more information about the output parameters that you can specify while defining a rule, see Transaction Validation and Initial Price Item Determination (Specific to Financial Services Domain). The **Search** (🔍) icon appears corresponding to this field. On clicking the **Search** icon, the **Search Input or Output Parameter** window appears. On specifying the parameter, the parameter description appears corresponding to the **Parameter Name** field.	Yes
Parameter Value	Used to specify the value for the parameter.	Yes

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Column Name	Column Description	Mandatory (Yes or No)
	Note: You can specify any special characters except ampersand (&), comma (,), underscore (_), equal to (=), tilde (~), and semi-colon(;) in the parameter value.	

- **Criteria** - Used to define criteria for the rule. This section contains the following columns:

Column Name	Column Description	Mandatory (Yes or No)
Sequence Number	Used to indicate the order in which the criteria should be executed in the rule.	Yes
Parameter Name	Used to indicate whether you want to specify a field or an algorithm as an input parameter. The valid values are: • Field • Algorithm **Note:** By default, the **Field** option is selected. If a business label is defined for a user defined field (that you have selected), the business label appears in the **Parameter Name** field.	Yes

If the parameter name is selected as ...	Then...
Field	The **Search** (🔍) icon appears corresponding to this field. On clicking the **Search** icon, the **Search Input or Output Parameter** window appears. On specifying the field, the field description appears corresponding to the **Parameter Name** field.
Algorithm	The **Search** (🔍) icon appears corresponding to this field. On clicking the **Search** icon, the **Algorithm Search** window appears. On specifying the algorithm, the algorithm description appears corresponding to the **Parameter Name** field.

Operator	Used to specify the relational operator to define the relation between the parameter name and value.	Yes
Parameter Value	Used to specify the parameter value. The valid values are: • Field • Algorithm	Yes

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<table>
<tr><th>Column Name</th><th>Column Description</th><th>Mandatory (Yes or No)</th></tr>
<tr><td></td><td>Note:
By default, the Field option is selected.
You can specify any special characters except ampersand (&), comma (,), underscore (_), equal to (=), tilde (~), and semi-colon(;) in the parameter value.
<table>
<tr><th>If the parameter value is selected as ...</th><th>Then...</th></tr>
<tr><td>Field</td><td>The Search (🔍) icon appears corresponding to this field. On clicking the Search icon, the Search Input or Output Parameter window appears.
On specifying the field, the field description appears corresponding to the Parameter Value field.</td></tr>
<tr><td>Algorithm</td><td>The Search (🔍) icon appears corresponding to this field. On clicking the Search icon, the Algorithm Search window appears.
On specifying the algorithm, the algorithm description appears corresponding to the Parameter Value field.</td></tr>
</table></td><td></td></tr>
<tr><td>Is True</td><td>Used to indicate what should happen when the condition is true (satisfied). The valid values are:
• Check next condition - Used to indicate that the condition with consecutive sequence number should be executed.
• Rule is false - Used to indicate that the action specified in the Rule False Action field should be executed.
• Rule is true - Used to indicate that the action specified in the Rule True Action field should be executed.</td><td>Yes</td></tr>
<tr><td>Is False</td><td>Used to indicate what should happen when the condition is false (not satisfied). The valid values are:
• Check next condition - Used to indicate that the condition with consecutive sequence number should be executed.
• Rule is false - Used to indicate that the action specified in the Rule False Action field should be executed.
• Rule is true - Used to indicate that the action specified in the Rule True Action field should be executed.</td><td>Yes</td></tr>
<tr><td>Is Insufficient</td><td>Used to indicate what should happen when the data is insufficient. The valid values are:
• Check next condition - Used to indicate that the condition with consecutive sequence number should be executed.</td><td>Yes</td></tr>
</table>

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Column Name	Column Description	Mandatory (Yes or No)
	• **Rule is false** - Used to indicate that the action specified in the **Rule False Action** field should be executed. • **Rule is true** - Used to indicate that the action specified in the **Rule True Action** field should be executed.	

Tip: Alternatively, you can access the **Add Rule** screen by clicking the **Add** link in the upper right corner of the **Search** zone in the **Rule** screen.

4. Enter the required details.

Note:

You can search for a parameter, dependent rule and an algorithm by clicking the **Search** (🔍) icon corresponding to the respective field.

If you want to associate more than one output parameter with the rule or define more than one criteria for the rule, click the **Add** (+) icon and then specify the details. However, if you want to remove an output parameter or a criteria from the rule, click the **Delete** (🗑) icon corresponding to it.

5. Click **Save**.
   The rule is defined.

Related Topics

For more information on...	See...
Rule screen	Rule on page 1096
Search zone	Search Rule on page 1096

Editing a Rule

Prerequisites

To edit a rule, you should have:

- Pre-processing and post-processing algorithms, dependent rules, and parameters defined in the application in case you want to use any of them.

Procedure

To edit a rule:

1. Search for the rule in the **Rule** screen.
2. In the **Search Results** section, click the **Edit** (✎) icon in the **Edit** column corresponding to the rule whose details you want to edit.

   The **Rule** screen appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Rule	Used to specify the rule code.	Yes
Rule Type	Used to specify the type of rule.	Yes
Description	Used to specify the description for the rule.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
Rule Priority	Used to specify the priority of the rule. **Note:** You cannot define two rules with the same rule type and priority in the same duration.	Yes
Effective Start Date	Used to specify the date from when the rule is effective.	Yes
Effective End Date	Used to specify the date till when the rule is effective. **Note:** The effective end date cannot be earlier than the effective start date.	No
Pre-Processing Algorithm	Used to specify the algorithm that will be triggered before executing the criteria in the rule. It pre-processes the input parameters and then returns processed values against which the criteria is validated. **Note:** The **Search** (🔍) icon appears corresponding to this field. On clicking the **Search** icon, the **Algorithm Search** window appears. On specifying the algorithm, the description of the algorithm appears corresponding to the **Pre-Processing Algorithm** field.	No
Post-Processing Algorithm	Used to specify the algorithm that will be triggered when the rule is true. It post-processes the output parameters and returns the updated values to the calling programs or dependent rules. **Note:** The **Search** (🔍) icon appears corresponding to this field. On clicking the **Search** icon, the **Algorithm Search** window appears. On specifying the algorithm, the description of the algorithm appears corresponding to the **Post-Processing Algorithm** field.	No
Rule True Action	Used to indicate what should happen when all conditions in the rule are satisfied and returns **Rule is True**. The valid values are: • **Next Dependent Rule** - Used to indicate that the dependent rule should be executed when the rule is true. • **Next Rule by Priority** - Used to indicate that the rule of the same rule type having lower priority should be executed when the rule is true. • **Success** - Used to indicate that no more rules should be executed when the rule is true. The output parameters and their values are returned to the calling programs.	Yes
Dependent Rule	Used to specify the next dependent rule that must be executed when **Next Dependent Rule** is selected from the **Rule True Action** list.	Yes (Conditional)

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Field Name	Field Description	Mandatory (Yes or No)
		Note: This field is required when you select **Next Dependent Rule** from the **Rule True Action** list.
Rule False Action	Used to indicate what should happen when any of the criteria in the rule is not satisfied and returns **Rule is False**. The valid values are: • **Next Dependent Rule** - Used to indicate that the dependent rule should be executed when the rule is false. • **Next Rule by Priority** - Used to indicate that the rule of the same rule type having lower priority should be executed when the rule is false. • **Success** - Used to indicate that no more rules should be executed when the rule is false. The output parameters and their values are returned to the calling programs.	Yes
Dependent Rule	Used to specify the next dependent rule that must be executed when **Next Dependent Rule** is selected from the **Rule False Action** list.	Yes (Conditional) **Note:** This field is required when you select **Next Dependent Rule** from the **Rule False Action** list.

In addition, it contains the following two sections:

- **Rule Output Parameters** - Used to specify the output parameters that must be returned to the calling programs or dependent rules when all conditions in the rule are satisfied. This section contains the following columns:

Column Name	Column Description	Mandatory (Yes or No)
Parameter Name	Used to specify the parameter. **Note:** For more information about the output parameters that you can specify while defining a rule, see Transaction Validation and Initial Price Item Determination (Specific to Financial Services Domain). The **Search** (🔍) icon appears corresponding to this field. On clicking the **Search** icon, the **Search Rule Type Field** window appears. On specifying the rule type field, the description of the rule type field appears corresponding to the **Parameter Name** field.	Yes
Parameter Value	Used to specify the value for the parameter.	Yes

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Column Name	Column Description	Mandatory (Yes or No)
	Note: You can specify any special characters except ampersand (&), comma (,), underscore (_), equal to (=), tilde (~), and semi-colon(;) in the parameter value.	

- **Criteria** - Used to define criteria for the rule. This section contains the following columns:

Column Name	Column Description	Mandatory (Yes or No)
Sequence Number	Used to indicate the order in which the criteria should be executed in the rule.	Yes
Parameter Name	Used to indicate whether you want to specify a field or an algorithm as an input parameter. The valid values are: • Field • Algorithm **Note:** By default, the **Field** option is selected. If a business label is defined for a user defined field (that you have selected), the business label appears in the **Parameter Name** field.	Yes
Operator	Used to specify the relational operator to define the relation between the parameter name and value.	Yes
Parameter Value	Used to specify the parameter value. The valid values are: • Field • Algorithm	Yes

If the parameter name is selected as ...	Then...
Field	The **Search** (🔍) icon appears corresponding to this field. On clicking the **Search** icon, the **Search Input or Output Parameter** window appears. On specifying the field, the field description appears corresponding to the **Parameter Name** field.
Algorithm	The **Search** (🔍) icon appears corresponding to this field. On clicking the **Search** icon, the **Algorithm Search** window appears. On specifying the algorithm, the algorithm description appears corresponding to the **Parameter Name** field.

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<table>
<tr><th>Column Name</th><th>Column Description</th><th>Mandatory (Yes or No)</th></tr>
<tr><td></td><td>Note:
By default, the Field option is selected.
You can specify any special characters except ampersand (&), comma (,), underscore (_), equal to (=), tilde (~), and semi-colon(;) in the parameter value.
<table><tr><th>If the parameter value is selected as ...</th><th>Then...</th></tr><tr><td>Field</td><td>The Search (🔍) icon appears corresponding to this field. On clicking the Search icon, the Search Input or Output Parameter window appears.
On specifying the field, the field description appears corresponding to the Parameter Value field.</td></tr><tr><td>Algorithm</td><td>The Search (🔍) icon appears corresponding to this field. On clicking the Search icon, the Algorithm Search window appears.
On specifying the algorithm, the algorithm description appears corresponding to the Parameter Value field.</td></tr></table></td><td></td></tr>
<tr><td>Is True</td><td>Used to indicate what should happen when the condition is true (satisfied). The valid values are:
• Check next condition - Used to indicate that the condition with consecutive sequence number should be executed.
• Rule is false - Used to indicate that the action specified in the Rule False Action field should be executed.
• Rule is true - Used to indicate that the action specified in the Rule True Action field should be executed.</td><td>Yes</td></tr>
<tr><td>Is False</td><td>Used to indicate what should happen when the condition is false (not satisfied). The valid values are:
• Check next condition - Used to indicate that the condition with consecutive sequence number should be executed.
• Rule is false - Used to indicate that the action specified in the Rule False Action field should be executed.
• Rule is true - Used to indicate that the action specified in the Rule True Action field should be executed.</td><td>Yes</td></tr>
<tr><td>Is Insufficient</td><td>Used to indicate what should happen when the data is insufficient. The valid values are:
• Check next condition - Used to indicate that the condition with consecutive sequence number should be executed.</td><td>Yes</td></tr>
</table>

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Column Name	Column Description	Mandatory (Yes or No)
	• **Rule is false** - Used to indicate that the action specified in the **Rule False Action** field should be executed. • **Rule is true** - Used to indicate that the action specified in the **Rule True Action** field should be executed.	

Tip: Alternatively, you can access the **Edit Rule** screen by clicking the **Edit** link in the **View Rule** screen.

3. Modify the required details.

Note: You can search for a parameter, dependent rule and an algorithm by clicking the **Search** (🔍) icon corresponding to the respective field.

4. Add or remove output parameters or criteria from the rule, if required.

Note: If you want to associate more than one output parameter with the rule or define more than one criteria for the rule, click the **Add** (+) icon and then specify the details. However, if you want to remove an output parameter or a criteria from the rule, click the **Delete** (🗑) icon corresponding to it.

5. Click **Save**.
   The changes made to the rule are saved.

Related Topics

For more information on...	See...
Rule screen	Rule on page 1096
Search zone	Search Rule on page 1096

Deleting a Rule

Procedure

To delete a rule:

1. Search for the rule in the **Rule** screen.
2. In the **Search Results** section, click the **Delete** (🗑) icon in the **Delete** column corresponding to the rule that you want to delete.
   A message appears confirming whether you want to delete the rule.

Note: You can delete a rule when it is not yet used in the system.

3. Click **OK**.
   The rule is deleted.

Related Topics

For more information on...	See...
Rule screen	Rule on page 1096
Search zone	Search Rule on page 1096

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Copying a Rule

Instead of creating a rule from scratch, you can also create a new rule using an existing rule. You can do this by copying a rule. When you copy a rule, the output parameters and criteria defined for the original rule are copied to the new rule. You can then add or remove parameters or criteria from the new rule.

Prerequisites

To copy a rule, you should have:

- Rule (whose copy you want to create) defined in the application
- Preprocessing and postprocessing algorithms, dependent rules, and parameters defined in the application in case you want to use any of them

Procedure

To copy a rule:

1. Search for the rule in the **Rule** screen.
2. In the **Search Results** section, click the **Copy** (⧉) icon corresponding to the rule whose copy you want to *c*reate.

   The **Rule** screen appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Rule	Used to specify the rule code.	Yes
Rule Type	Used to specify the type of rule.	Yes
Description	Used to specify the description for the rule.	Yes
Rule Priority	Used to specify the priority of the rule. **Note:** You cannot define two rules with the same rule type and priority in the same duration.	Yes
Effective Start Date	Used to specify the date from when the rule is effective.	Yes
Effective End Date	Used to specify the date till when the rule is effective. **Note:** The effective end date cannot be earlier than the effective start date.	No
Pre-Processing Algorithm	Used to specify the algorithm that will be triggered before executing the criteria in the rule. It pre-processes the input parameters and then returns processed values against which the criteria is validated. **Note:** The **Search** (🔍) icon appears corresponding to this field. On clicking the **Search** icon, the **Algorithm Search** window appears. On specifying the algorithm, the description of the algorithm appears corresponding to the **Pre-Processing Algorithm** field.	No
Post-Processing Algorithm	Used to specify the algorithm that will be triggered when the rule is true. It post-processes the output parameters and returns the updated values to the calling programs or dependent rules.	No

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The **Search** (🔍) icon appears corresponding to this field. On clicking the **Search** icon, the **Algorithm Search** window appears. On specifying the algorithm, the description of the algorithm appears corresponding to the **Post-Processing Algorithm** field.	
Rule True Action	Used to indicate what should happen when all conditions in the rule are satisfied and returns **Rule is True**. The valid values are: • **Next Dependent Rule** - Used to indicate that the dependent rule should be executed when the rule is true. • **Next Rule by Priority** - Used to indicate that the rule of the same rule type having lower priority should be executed when the rule is true. • **Success** - Used to indicate that no more rules should be executed when the rule is true. The output parameters and their values are returned to the calling programs.	Yes
Dependent Rule	Used to specify the next dependent rule that must be executed when **Next Dependent Rule** is selected from the **Rule True Action** list.	Yes (Conditional) **Note:** This field is required when you select **Next Dependent Rule** from the **Rule True Action** list.
Rule False Action	Used to indicate what should happen when any of the criteria in the rule is not satisfied and returns **Rule is False**. The valid values are: • **Next Dependent Rule** - Used to indicate that the dependent rule should be executed when the rule is false. • **Next Rule by Priority** - Used to indicate that the rule of the same rule type having lower priority should be executed when the rule is false. • **Success** - Used to indicate that no more rules should be executed when the rule is false. The output parameters and their values are returned to the calling programs.	Yes
Dependent Rule	Used to specify the next dependent rule that must be executed when **Next Dependent Rule** is selected from the **Rule False Action** list.	Yes (Conditional) **Note:** This field is required when you select **Next Dependent Rule** from the **Rule False Action** list.

In addition, it contains the following two sections:

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- **Rule Output Parameters** - Used to specify the output parameters that must be returned to the calling programs or dependent rules when all conditions in the rule are satisfied. This section contains the following columns:

Column Name	Column Description	Mandatory (Yes or No)
Parameter Name	Used to specify the parameter. **Note:** For more information about the output parameters that you can specify while defining a rule, see Transaction Validation and Initial Price Item Determination (Specific to Financial Services Domain). The **Search** (🔍) icon appears corresponding to this field. On clicking the **Search** icon, the **Search Rule Type Field** window appears. On specifying the rule type field, the description of the rule type field appears corresponding to the **Parameter Name** field.	Yes
Parameter Value	Used to specify the value for the parameter. **Note:** You can specify any special characters except ampersand (&), comma (,), underscore (_), equal to (=), tilde (~), and semi-colon(;) in the parameter value.	Yes

- **Criteria** - Used to define criteria for the rule. This section contains the following columns:

Column Name	Column Description	Mandatory (Yes or No)
Sequence Number	Used to indicate the order in which the criteria should be executed in the rule.	Yes
Parameter Name	Used to indicate whether you want to specify a field or an algorithm as an input parameter. The valid values are: • Field • Algorithm	Yes

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<table>
<tr><th>Column Name</th><th>Column Description</th><th>Mandatory (Yes or No)</th></tr>
<tr><td></td><td>Note:
By default, the Field option is selected.
If a business label is defined for a user defined field (that you have selected), the business label appears in the Parameter Name field.<table><tr><th>If the parameter name is selected as ...</th><th>Then...</th></tr><tr><td>Field</td><td>The Search (🔍) icon appears corresponding to this field. On clicking the Search icon, the Search Input or Output Parameter window appears.
On specifying the field, the field description appears corresponding to the Parameter Name field.</td></tr><tr><td>Algorithm</td><td>The Search (🔍) icon appears corresponding to this field. On clicking the Search icon, the Algorithm Search window appears.
On specifying the algorithm, the algorithm description appears corresponding to the Parameter Name field.</td></tr></table></td><td></td></tr>
<tr><td>Operator</td><td>Used to specify the relational operator to define the relation between the parameter name and value.</td><td>Yes</td></tr>
<tr><td>Parameter Value</td><td>Used to specify the parameter value. The valid values are:
• Field
• Algorithm</td><td>Yes</td></tr>
</table>

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<table>
<tr><th>Column Name</th><th>Column Description</th><th>Mandatory (Yes or No)</th></tr>
<tr><td></td><td>Note:
By default, the Field option is selected.
You can specify any special characters except ampersand (&), comma (,), underscore (_), equal to (=), tilde (~), and semi-colon(;) in the parameter value.
<table><tr><th>If the parameter value is selected as ...</th><th>Then...</th></tr><tr><td>Field</td><td>The Search (🔍) icon appears corresponding to this field. On clicking the Search icon, the Search Input or Output Parameter window appears.
On specifying the field, the field description appears corresponding to the Parameter Value field.</td></tr><tr><td>Algorithm</td><td>The Search (🔍) icon appears corresponding to this field. On clicking the Search icon, the Algorithm Search window appears.
On specifying the algorithm, the algorithm description appears corresponding to the Parameter Value field.</td></tr></table></td><td></td></tr>
<tr><td>Is True</td><td>Used to indicate what should happen when the condition is true (satisfied). The valid values are:
• Check next condition - Used to indicate that the condition with consecutive sequence number should be executed.
• Rule is false - Used to indicate that the action specified in the Rule False Action field should be executed.
• Rule is true - Used to indicate that the action specified in the Rule True Action field should be executed.</td><td>Yes</td></tr>
<tr><td>Is False</td><td>Used to indicate what should happen when the condition is false (not satisfied). The valid values are:
• Check next condition - Used to indicate that the condition with consecutive sequence number should be executed.
• Rule is false - Used to indicate that the action specified in the Rule False Action field should be executed.
• Rule is true - Used to indicate that the action specified in the Rule True Action field should be executed.</td><td>Yes</td></tr>
<tr><td>Is Insufficient</td><td>Used to indicate what should happen when the data is insufficient. The valid values are:
• Check next condition - Used to indicate that the condition with consecutive sequence number should be executed.</td><td>Yes</td></tr>
</table>

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Column Name	Column Description	Mandatory (Yes or No)
	• **Rule is false** - Used to indicate that the action specified in the **Rule False Action** field should be executed. • **Rule is true** - Used to indicate that the action specified in the **Rule True Action** field should be executed.	

3. Modify the required details.
4. Add or remove the output parameters or criteria from the new rule, if required.

Note:

You can specify any special characters except ampersand (&), comma (,), underscore (_), equal to (=), tilde (~), and semi-colon(;) in the parameter value.

You can search for a parameter, dependent rule and an algorithm by clicking the **Search** (🔍) icon corresponding to the respective field.

If you want to associate more than one output parameter with the rule or define more than one criteria for the rule, click the **Add** (+) icon and then specify the details. However, if you want to remove an output parameter or a criteria from the rule, click the **Delete** (🗑) icon corresponding to it. For more information on the output parameters that you can specify while defining a rule, see Transaction Validation and Initial Price Item Determination (Specific to Financial Services Domain).

5. Click **Save**.
   The new rule is defined.

Related Topics

For more information on...	See...
Rule screen	Rule on page 1096
Search zone	Search Rule on page 1096
How to define a rule	Defining a Rule on page 1098

Rule

The **Rule** screen allows you to view the details of a rule. This screen consists of the following zones:

- Rule Information on page 1114

Rule Information

The **Rule Information** zone displays information about the rule. This zone contains the following fields:

Field Name	Field Description
Rule	Displays the rule code.
Rule Type	Indicates the type of rule.
Description	Displays the description of the rule.
Rule Priority	Indicates the priority of the rule.

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Field Name	Field Description
	Note: You can use the **Move Up** (⇧) and **Move Down** (⇩) icons corresponding to this field to view the details of a rule (having the same rule type) with a higher or lower priority. Note that this functionality is available when you access the **View Rule** screen through the **Rule** screen.
Effective Start Date	Displays the date from when the rule is effective.
Effective End Date	Displays the date till when the rule is effective.
Pre-Processing Algorithm	Indicates the algorithm that will be triggered before executing the criteria in the rule. It pre-processes the input parameters and then returns processed values against which the criteria is validated.
Post-Processing Algorithm	Indicates the algorithm that will be triggered after executing the criteria in the rule. It post-processes the output parameters and returns the updated values to the calling programs or dependent rules.
Rule True Action	Indicates what should happen when all conditions in the rule are satisfied and returns **Rule is True**.
Dependent Rule	Indicates the next dependent rule that must be executed when **Next Dependent Rule** is selected from the **Rule True Action** list.
Rule False Action	Indicates what should happen when any of the criteria in the rule is not satisfied and returns **Rule is False**.
Dependent Rule	Indicates the next dependent rule that must be executed when **Next Dependent Rule** is selected from the **Rule False Action** list.

In addition, it contains the following two sections:

- **Rule Output Parameters** - Lists the output parameters that must be returned to the calling programs or dependent rules when all conditions in the rule are satisfied. This section contains the following columns:

Column Name	Column Description
Parameter Name	Displays the name of the parameter. In addition, this column has a context menu which helps in navigating to the **Field** screen.
Parameter Value	Displays the value of the parameter.

- **Criteria** - Lists the criteria defined in the rule. This section contains the following columns:

Column Name	Column Description
Sequence Number	Indicates the order in which the criteria should be executed in the rule.
Parameter Type	Indicates whether the input parameter is a field or an algorithm.
Parameter Name	Displays the field or algorithm name which is used as an input parameter.
Operator	Indicates the relational operator used to define the relation between the parameter name and value.
Parameter Value	Displays the parameter value.
Is True	Indicates what should happen when the condition is true (satisfied). The valid values are: • **Check next condition** - Indicates that the condition with consecutive sequence number should be executed. • **Rule is false** - Indicates that the action specified in the **Rule False Action** field should be executed.

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Column Name	Column Description
	• **Rule is true** - Indicates that the action specified in the **Rule True Action** field should be executed.
Is False	Indicates what should happen when the condition is false (not satisfied). The valid values are: • **Check next condition** - Indicates that the condition with consecutive sequence number should be executed. • **Rule is false** - Indicates that the action specified in the **Rule False Action** field should be executed. • **Rule is true** - Indicates that the action specified in the **Rule True Action** field should be executed.
Is Insufficient	Indicates what should happen when the data is insufficient. The valid values are: • **Check next condition** - Indicates that the condition with consecutive sequence number should be executed. • **Rule is false** - Indicates that the action specified in the **Rule False Action** field should be executed. • **Rule is true** - Indicates that the action specified in the **Rule True Action** field should be executed.

The **Edit** link appears in the upper-right corner of the **Rule Information** zone. On clicking the **Edit** link, the **Edit Rule** screen appears where you can edit the details of the rule.

Related Topics

For more information on...	See...
How to view the details of a rule	Viewing the Rule Details on page 1098

Viewing the Rule Details

Procedure

To view the details of a rule:

1. Search for the rule in the **Rule** screen.
2. In the **Search Results** section, click the **View** (🔗) icon in the **View** column corresponding to the rule whose *d*etails you want to view.
   The **View Rule** screen appears.
3. View the details of the rule in the **Rule Information** zone.

Related Topics

For more information on...	See...
View Rule screen	Rule on page 1114
Rule Information zone	Rule Information on page 1114
How to search for a rule	Searching for a Rule Type on page 1080

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Rule Check

The **Rule Check** screen allows you to validate whether rules of a particular rule type are executed as expected. On validating, it indicates the sequence in which all effective rules were executed, the total execution time, and the output parameters of the rule that was successfully executed. This screen consists of the following sections:

- Rule Type Input Parameters
- Rule Output Parameters
- Rule Execution

Rule Type Input Parameters

The **Rule Type Input Parameters** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Rule Type	Used to specify the rule type.	Yes
Effective Date	Used when you want to execute the rules which are effective on a particular date. **Note:** If you do not specify the effective date, the system executes all rules which are effective on the system date.	No
Parameter Name	Indicates the input parameter. **Note:** The input parameters listed change depending on the rule type that you have selected.	Not applicable
Parameter Value	Used to specify the value for the input parameter.	Yes

In addition, this section contains the **Check Rule** button. On clicking the button, you can validate the sequence in which the rules with the specified rule type are executed.

Rule Output Parameters

The **Rule Output Parameters** section contains the following fields:

Field Name	Field Description
Status	Displays the status of the rule execution. The valid values are: • **Success** - Indicates that one of the rule was successfully executed and returned the output parameters. • **Fail** - Indicates that none of the rules with the specified rule type were successfully executed. • **Error** - Indicates that an error occurred while executing a rule.
Execution Time	Displays the total time taken to execute all effective rules with the specified rule type.
Error	Displays the error message indicating the error that occurred while executing a rule. **Note:** This field appears when the status is **Error**.

In addition, this section contains the following columns:

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Column Name	Column Description
Parameter Name	Displays the output parameter of the rule that was successfully executed.
Parameter Value	Displays the value of the output parameter.

Rule Execution

The **Rule Execution** section indicates the sequence in which all effective rules with the specified rule type were executed. This section contains the following columns:

Column Name	Column Description
Rule	Indicates the rule that was executed.
Rule Type	Indicates the type of rule.
Rule Priority	Indicates the priority of the rule.
Rule Status	Indicates whether the rule was true or false.
Rule Next Action	Indicates the action that took place when the rule was true or false.

Rule Check

The **Rule Check** zone allows you to validate whether rules of a particular rule type are executed as expected. It indicates the sequence in which all effective rules were executed along with the total execution time. This zone consists of the following sections:

- **Rule Type Input Parameters** - This sections contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Rule Type	Used to specify the rule type.	Yes
Effective Date	Used when you want to execute the rules which are effective on a particular date.	No
Parameter Name	Indicates the input parameter. **Note:** The input parameters listed change depending on the rule type that you have selected.	Not applicable
Parameter Value	Used to specify the value for the input parameter.	Yes

  In addition, this section contains the **Check Rule** button. On clicking the button, you can validate the sequence in which the rules with the specified rule type are executed.
- **Rule Output Parameters** - This section contains the following fields:

Field Name	Field Description
Status	Displays the status of the rule execution. The valid values are: • **Success** - Indicates that one of the rule was successfully executed and returned the output parameters. • **Fail** - Indicates that none of the rules with the specified rule type were successfully executed. • **Error** - Indicates that an error occurred while executing a rule.
Execution Time	Displays the total time taken to execute a set of rules.

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Field Name	Field Description
Error	Displays the error message indicating the error that occurred while executing a rule.
	Note: This field appears when the status is **Error**.

In addition, this section contains the following columns:

Column Name	Column Description
Parameter Name	Displays the output parameter of the rule that was successfully executed.
Parameter Value	Displays the value of the output parameter.

- **Rule Execution** - Indicates the sequence in which the rules with the specified rule type were executed. This section contains the following columns:

Column Name	Column Description
Rule Code	Displays the rule code.
Rule Type	Displays the type of rule.
Rule Priority	Displays the priority of the rule.
Rule Status Flag	Indicates whether the rule was true or false.
Rule Next Action	Indicates the action that took place when the rule was true or false.

Related Topics

For more information on...	See...
Rule Check screen	Rule Check on page 1117

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Chapter 15

Alternate Sequential Bill Numbers

Topics:

- Alternate Sequential Bill Number Generation Algorithms
- Enabling the Alternate Sequential Bill Numbers Feature

Each bill is uniquely identified by its bill ID. Bill ID is a random system-generated number. In some locales, bills have an additional identifier known as alternate sequential bill number. Alternate sequential bill numbers are system-generated sequential numbers. For example, the first bill generated by the system is assigned a sequential bill number of 1, the next bill is assigned a value of 2, and so on.

If you want to generate alternate sequential bill numbers for the pending or completed bills, you must select the **Use Sequential Bill Numbers** option in the **Billing** tab of the **Installation Options** screen. You can configure the application to generate alternate sequential bill numbers which are either unique throughout the system or within the division. The **Assign Sequential Bill Numbers (ASSGNSBN)** batch allows you to generate alternate sequential bill numbers for the completed or pending bills. You need to configure this batch such that it is executed at regular intervals. For more information about the batch, refer to *Oracle Revenue Management and Billing Batch Guide*.

Related Topics

For more information on...	See...
How to enable the Alternate Sequential Bill Numbers feature	Enabling the Alternate Sequential Bill Numbers Feature on page 1127

Alternate Sequential Bill Number Generation Algorithms

The following table lists the alternate sequential bill number generation algorithm types which are shipped with the product:

If you want to generate...	Then create an algorithm using the following algorithm type...
Alternate sequential bill numbers unique throughout the system	C1_ALTBLLSYS on page 1122
Alternate sequential bill numbers unique within the division	C1_ALTBLDV on page 1125
Alternate sequential bill numbers unique throughout the system in the required format using a set of parameters	C1_ALTBLSYS1 on page 1122 **Note:** The alternate sequential bill number will be unique throughout the system when you configure the algorithm parameters appropriately.
Alternate sequential bill numbers unique within the division in the required format using a set of parameters	C1_ALTBLDIV1 on page 1125 **Note:** The alternate sequential bill number will be unique within the division when you configure the algorithm parameters appropriately.

C1_ALTBLLSYS

The **C1_ALTBLLSYS** algorithm type is used to generate an alternate bill ID for the completed and pending bills. The alternate bill ID is sequenced using the sequence number, and is unique throughout the system. This algorithm type does not have any parameters.

If you attach an algorithm created using the **C1_ALTBLLSYS** algorithm type to the **Sequence Generation Algorithm** field in the **Billing** tab of the **Installation Options** screen, the algorithm is invoked while executing the **Assign Sequential Bill Numbers (ASSGNSBN)** batch.

C1_ALTBLSYS1

The **C1_ALTBLSYS1** algorithm type is used to generate an alternate bill ID for the completed and pending bills. You can generate an alternate bill ID in the required format using the following parameters:

Parameter	Description
'X'	Here, X stands for a separator. For example, ','. The separator must be enclosed within single quotes. It will act as a delimiter in the alternate sequential bill number.
CIS_DIVISION	The division to which the account belongs. It is retrieved from the bill. It should not be more than five characters.
BILL_CYC_CD	The bill cycle of the account for which the bill is generated. It is retrieved from the bill. It should not be more than four characters.
ACCT_INDENTIFIER=<Account_Identifier_Type>, <CharStartPosition>,<CharCount>	Here, you need to specify the following information separated by a comma:

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Parameter	Description
	• **<Account_Identifier_Type>** - Used to indicate the account identifier type whose value must be used to generate the alternate sequential bill number. • **<CharStartPosition>** - Used to indicate the starting position from where you want to extract the characters from the account identifier. If you do not specify the starting position, by default, it is set to zero (0) (i.e. from the first character). • **<CharCount>** - Used to indicate the number of characters that you want to extract from the account identifier. If you do not specify the count, by default, it is set to five.
CHARACC=<Characteristic_Type>, <CharStartPosition>,<CharCount>	Here, you need to specify the following information separated by a comma: • **<Characteristic_Type>** - Used to indicate the account's characteristic whose value must be used to generate the alternate sequential bill number. • **<CharStartPosition>** - Used to indicate the starting position from where you want to extract the characters from the characteristic value. If you do not specify the starting position, by default, it is set to zero (0) (i.e. from the first character). • **<CharCount>** - Used to indicate the number of characters that you want to extract from the characteristic value. If you do not specify the count, by default, it is set to five. **Note:** If the same characteristic is defined multiple times for an account, the characteristic value which is effective on the batch business date is considered.
CHARPER=<Characteristic_Type>, <CharStartPosition>,<CharCount>	Here, you need to specify the following information separated by a comma: • **<Characteristic_Type>** - Used to indicate the person's characteristic whose value must be used to generate the alternate sequential bill number. • **<CharStartPosition>** - Used to indicate the starting position from where you want to extract the characters from the characteristic value. If you do not specify the starting position, by default, it is set to zero (0) (i.e. from the first character). • **<CharCount>** - Used to indicate the number of characters that you want to extract from the characteristic value. If you do not specify the count, by default, it is set to five. **Note:** If the same characteristic is defined multiple times for a person, the characteristic value which is effective on the batch business date is considered.
BILL_DT=MMddyy	The date when the bill is created for the account. It should not be more than six characters. You can use the following patterns in the date format: • "yyyy" or "yy" for year

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Parameter	Description
	• "MM" or "M" for month • "dd" or "d" for day **Note:** The date format should either start or end with the year.
SEQ_NBR	The sequence number generated by the database. It should not be more than 12 characters.
FIXED_SUFFIX=XX	Here, X stands for a letter or a group of letters that you want to add at the end of the alternate sequential bill number.
LEFT_PADDING_CHAR=ZERO or LEFT_PADDING_CHAR=SPACE	Indicates whether you want to add zero or space when the number of characters derived from the account's or person's characteristic value is less than the character count. The padding is added to the left.

You can specify the above mentioned parameters against any of the following parameters available in the **C1_ALTBLSYS1** algorithm type:

- Field1
- Field2
- Field3
- Field4
- Field5
- Field6
- Field7
- Field8
- Field9
- Field10

None of these algorithm type parameters are mandatory. The system will concatenate the parameter values and then generate alternate bill ID in the required format. For example, if you create an algorithm using the following parameters:

- Field1 - CIS_DIVISION
- Field2 - ‘|’
- Field3 - SEQ_NBR
- Field4 - ‘-’
- Field5 - FIXED_SUFFIX=01

In this case, the system will generate the alternate bill ID in the CIS_DIVISION|SEQ_NBR-01 format. For example, DIV1|12345678-01. If you want to generate unique alternate bill ID, we recommend you to use the **SEQ_NBR** parameter while creating an algorithm using the **C1_ALTBLSYS1** algorithm type.

Note that if you do not specify the value for any parameters while creating an algorithm using the **C1_ALTBLSYS1** algorithm type, the system will generate the alternate bill ID using the sequence number.

While specifying the value for these parameters, you need to ensure that the length of the alternate bill ID should not exceed 30 characters. An algorithm named **C1_ALTBLSYS1** is already shipped with the product. You can create custom algorithms using the **C1_ALTBLSYS1** algorithm type to design the required alternate bill ID format using the above mentioned parameters. If you attach an algorithm created using the **C1_ALTBLSYS1** algorithm type to the **Sequence Generation Algorithm** field in the **Billing** tab of the **Installation Options** screen, the algorithm is invoked while executing the **Assign Sequential Bill Numbers (ASSGNSBN)** batch.

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C1_ALTBLDV

The **C1_ALTBLDV** algorithm type is used to generate a unique alternate bill ID for the completed and pending bills within the division. For example, two bills (such as B1 and B2) belonging to the same division (such as D1) cannot have the same alternate bill ID. However, two bills (such as B1 and B2) belonging to different divisions, (such as D1 and D2) can have the same alternate bill ID.

This algorithm type contains the following parameter:

Parameter	Description	Mandatory (Yes or No)
Initial Bill Sequence Number	Used to specify the initial alternate bill ID that you want to use while sequencing. **Note:** If you do not specify any value for this parameter, by default, the system will generate the initial alternate bill ID for sequencing.	No

If you attach an algorithm created using the **C1_ALTBLDV** algorithm type to the **Sequence Generation Algorithm** field in the **Billing** tab of the **Installation Options** screen, the algorithm is invoked while executing the **Assign Sequential Bill Numbers (ASSGNSBN)** batch.

C1_ALTBLDIV1

The **C1_ALTBLDIV1** algorithm type is used to generate an alternate bill ID for the completed and pending bills. You can generate an alternate bill ID in the required format using the following parameters:

Parameter	Description
'X'	Here, X stands for a separator. For example, ','. The separator must be enclosed within single quotes. It will act as a delimiter in the alternate sequential bill number.
CIS_DIVISION	The division to which the account belongs. It is retrieved from the bill. It should not be more than five characters.
BILL_CYC_CD	The bill cycle of the account for which the bill is generated. It is retrieved from the bill. It should not be more than four characters.
ACCT_INDENTIFIER=<Account_Identifier_Type>, <CharStartPosition>,<CharCount>	Here, you need to specify the following information separated by a comma: • **<Account_Identifier_Type>** - Used to indicate the account identifier type whose value must be used to generate the alternate sequential bill number. • **<CharStartPosition>** - Used to indicate the starting position from where you want to extract the characters from the account identifier. If you do not specify the starting position, by default, it is set to zero (0) (i.e. from the first character). • **<CharCount>** - Used to indicate the number of characters that you want to extract from the account identifier. If you do not specify the count, by default, it is set to five.

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Parameter	Description
CHARACC=<Characteristic_Type>, <CharStartPosition>,<CharCount>	Here, you need to specify the following information separated by a comma: • **<Characteristic_Type>** - Used to indicate the account's characteristic whose value must be used to generate the alternate sequential bill number. • **<CharStartPosition>** - Used to indicate the starting position from where you want to extract the characters from the characteristic value. If you do not specify the starting position, by default, it is set to zero (0) (i.e. from the first character). • **<CharCount>** - Used to indicate the number of characters that you want to extract from the characteristic value. If you do not specify the count, by default, it is set to five. **Note:** If the same characteristic is defined multiple times for an account, the characteristic value which is effective on the batch business date is considered.
CHARPER=<Characteristic_Type>, <CharStartPosition>,<CharCount>	Here, you need to specify the following information separated by a comma: • **<Characteristic_Type>** - Used to indicate the person's characteristic whose value must be used to generate the alternate sequential bill number. • **<CharStartPosition>** - Used to indicate the starting position from where you want to extract the characters from the characteristic value. If you do not specify the starting position, by default, it is set to zero (0) (i.e. from the first character). • **<CharCount>** - Used to indicate the number of characters that you want to extract from the characteristic value. If you do not specify the count, by default, it is set to five. **Note:** If the same characteristic is defined multiple times for a person, the characteristic value which is effective on the batch business date is considered.
BILL_DT=MMddyy	The date when the bill is created for the account. It should not be more than six characters. You can use the following patterns in the date format: • "yyyy" or "yy" for year • "MM" or "M" for month • "dd" or "d" for day **Note:** The date format should either start or end with the year.
FIXED_SUFFIX=XX	Here, X stands for a letter or a group of letters that you want to add at the end of the alternate sequential bill number.
LEFT_PADDING_CHAR=ZERO or LEFT_PADDING_CHAR=SPACE	Indicates whether you want to add zero or space when the number of characters derived from the account's or person's characteristic value is less than the character count. The padding is added to the left.

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You can specify the above mentioned parameters against any of the following parameters available in the **C1_ALTBLDIV1** algorithm type:

- Field1
- Field2
- Field3
- Field4
- Field5
- Field6
- Field7
- Field8
- Field9
- Field10

None of these algorithm type parameters are mandatory. The system will concatenate the parameter values and then generate alternate bill ID in the required format. For example, if you create an algorithm using the following parameters:

- Field1 - CIS_DIVISION
- Field2 - '|'
- Field3 - BILL_DT=MMddyy
- Field4 - '-'
- Field5 - FIXED_SUFFIX=01

In this case, the system will generate the alternate bill ID in the CIS_DIVISION|MMddyy-01 format. For example, DIV1|110501-01. Note that if you do not specify the value for any of these algorithm type parameters, the system will not generate the alternate bill ID for the completed and pending bills.

While specifying the value for these parameters, you need to ensure that the length of the alternate bill ID should not exceed 30 characters. An algorithm named **C1_ALTBLDIV1** is already shipped with the product. You can create custom algorithms using the **C1_ALTBLDIV1** algorithm type to design the required alternate bill ID format using the above mentioned parameters. If you attach an algorithm created using the **C1_ALTBLDIV1** algorithm type to the **Sequence Generation Algorithm** field in the **Billing** tab of the **Installation Options** screen, the algorithm is invoked while executing the **Assign Sequential Bill Numbers (ASSGNSBN)** batch.

Enabling the Alternate Sequential Bill Numbers Feature

Prerequisites

To enable the alternate sequential bill numbers feature, you should have:

- An algorithm created using the **C1_ALTBLLSYS**, **C1_ALTBLSYS1**, **C1_ALTBLDV**, or **C1_ALTBLDIV1** algorithm type that you want to use for alternate sequential bill number generation

Procedure

To enable the alternate sequential bill numbers feature:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **I** and then click **Installation Options**.
   The **Installation Options** screen appears.
3. Click the **Billing** tab.
   The **Billing** tab appears.
4. Select the **Use Sequential Bill Numbers** option to indicate that you want to generate alternate *s*equential bill numbers for the completed and pending bills.
   The **Sequential Invoice** field is enabled.

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5. Select the **System-wide** or **Division-specific** option from the **Sequential Invoice** list depending on whether *y*ou want alternate sequential bill numbers to be unique throughout the system or within the division.
6. Do either of the following:

If you want to generate...	Then
Alternate sequential bill numbers unique throughout the system	**a.** Attach an algorithm created using the **C1_ALTBLLSYS** algorithm type to the **Sequence Generation Algorithm** field to indicate how an alternate bill number which is unique throughout the system should be sequenced. **Note:** The **Sequence Generation Algorithm** field is enabled when the **System-wide** option is selected from the **Sequential Invoice** list. **b.** Click the **Save** button in the **Page Title** area. The changes made to the installation options are saved.
Alternate sequential bill numbers unique within the division	**a.** Click the **Save** button in the **Page Title** area. The changes made to the installation options are saved. **b.** From the **Admin** menu, select **D** and then click **Division**. The **Division** screen appears. **c.** Search for the division, whose accounts' bills should have alternate sequential bill numbers unique within the division. **d.** In the **Division** screen, click the **Algorithms** tab. The **Algorithms** tab appears. **e.** Select the **Sequential Bill Number Generation** option from the **Division Algorithm Entity** list. **f.** Enter the sequence number to indicate the order in which the algorithms with the same entity should be executed. **g.** Attach an algorithm created using the **C1_ALTBLDV** algorithm type to the respective field to indicate how an alternate bill number which is unique within the division should be sequenced. **h.** Click the **Save** button in the **Page Title** area. The changes made to the division are saved.
Alternate sequential bill numbers unique throughout the system in the required format using a set of parameters	**a.** Attach an algorithm created using the **C1_ALTBLSYS1** algorithm type to the **Sequence Generation Algorithm** field to indicate how an alternate bill number which is unique throughout the system should be generated. **Note:** The **Sequence Generation Algorithm** field is enabled when the **System-wide** option is selected from the **Sequential Invoice** list. The alternate sequential bill number will be unique throughout the system when you configure the algorithm parameters appropriately. **b.** Click the **Save** button in the **Page Title** area. The changes made to the installation options are saved.
Alternate sequential bill numbers unique within the division in the required format using a set of parameters	**a.** Click the **Save** button in the **Page Title** area. The changes made to the installation options are saved. **b.** From the **Admin** menu, select **D** and then click **Division**. The **Division** screen appears.

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If you want to generate...	Then
	c. Search for the division, whose accounts' bills should have alternate sequential bill numbers unique within the division. **d.** In the **Division** screen, click the **Algorithms** tab. The **Algorithms** tab appears. **e.** Select the **Sequential Bill Number Generation** option from the **Division Algorithm Entity** list. **f.** Enter the sequence number to indicate the order in which the algorithms with the same entity should be executed. **g.** Attach an algorithm created using the **C1_ALTBLDIV1** algorithm type to the respective field to indicate how an alternate bill number which is unique within the division should be generated. **Note:** The alternate sequential bill number will be unique within the division when you configure the algorithm parameters appropriately. **h.** Click the **Save** button in the **Page Title** area. The changes made to the division are saved.

Related Topics

For more information on...	See...
Alternate Sequential Bill Numbers	Alternate Sequential Bill Numbers on page 1121
Alternate Sequential Bill Number Generation Algorithms	Alternate Sequential Bill Number Generation Algorithms on page 1122

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Chapter 16

Transaction Feed Management

Topics:

- Prerequisites
- Transaction Rating Before Billing
- Transaction Aggregation
- Transaction Aggregation Batch Processing
- Transaction Disaggregation
- Transaction Disaggregation Batch Processing
- Reseeding (Specific to Health Insurance Domain)
- Transaction Cancellation
- Transaction Cancellation Batch Processing
- Transaction Rollback
- Feed Status Transition
- Transaction Status Transition
- Transaction Leg Status Transition
- Transaction Data File
- Error List
- Alert Notification for Transaction Feed Management
- Feed Management Dashboard
- Transaction Details
- Transaction Source
- Transaction Record Type
- Transaction Aggregation Rule
- Schedule
- Disaggregation Request

Oracle Revenue Management and Billing provides you with a facility to upload banking and Administrative Services Only (ASO) transactions received from various product processors or applications for billing. You can use the **File Upload Interface** feature to upload transaction data files in the following formats:

- Comma Separated Values
- JavaScript Object Notation
- Fixed Position
- Pipe Separated Values
- Tilde Separated Values
- Extensible Markup Language

For more information on how to upload the data using the **File Upload Interface** feature, refer to the respective feature documentation. Once the transaction data is uploaded in the system, you need to:

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

The system provides the flexibility to rate the transactions either prior to billing or during billing. Based on the business requirements, you can configure the system such that transactions mapped to some price item can be rated at a frequency which is different than the account's billing frequency. For example, daily, weekly, etc. During the transaction feed management process, each transaction goes through various statuses until it is billed to the person. For more information about the transaction statuses, see Transaction Status Transition on page 1183.

The transaction feed management process includes the following sub-processes:

- Transaction Aggregation
- Transaction Disaggregation on page 1166
- Transaction Cancellation on page 1177
- Transaction Rollback on page 1181

Prerequisites

To setup the transaction feed management process, you need to do the following:

- Define the required transaction sources in the system
- Define the required transaction record types for each transaction source
- Associate the required SQIs with a price item -division combination
- Define the required transaction aggregation rule for each SQI
- Define the aggregation schedules in the system
- Define the required rules in the system to determine initial price item for transactions
- Attach a validation algorithm to each account identifier type (to ensure that the account identifier type and account identifier combination is unique in or across divisions)
- Attach the **Price Assignment Search** algorithm to each division
- Define the **TFM - Processing Date** characteristic for each division
- Create an algorithm of the **C1_CURALGTFM** algorithm type and attach it to the **TFM - Currency Conversion** algorithm spot of the division for which you want to enable the currency conversion feature
- Define the required exchange rates for currency conversion
- Define values for the PAGE_NUMBER lookup field
- Create an algorithm of the **C1_RTCL_POPC** algorithm type and attach it to the **TFM - Rate Post-Processing** algorithm spot of the required division

Besides this, you need to setup the following feature configurations:

- Setting the C1_RLENG Feature Configuration on page 4466
- Setting the C1-TXNDMYID Feature Configuration on page 4467
- Setting the C1_PPARM_FLG Feature Configuration on page 4461
- Setting the C1_FM Feature Configuration on page 4451

Transaction Rating Before Billing

The system provides the flexibility to rate the transaction legs either prior to billing or during billing. Based on the business requirements, you can configure the system such that transactions mapped to some price items can be rated at a frequency which is different than the account's billing frequency. For example, daily, weekly, etc. This will help to reduce the performance issues which are caused when large volume of transactions are rated at the time of billing.

The system offers the following ways in which a transaction leg can be priced, rated and billed:

1. **Rate the Transaction Leg During Billing** - In this approach, you can use either of the following ways:
   a. Determine effective pricing for a transaction leg, create a billable charge for the transaction leg, and then determine the rate during billing.
   b. Determine effective pricing for a transaction leg, create a billable charge for aggregated transaction legs, and then determine the rate during billing.
2. **Rate the Transaction Leg Prior to Billing** - In this approach, you can use either of the following ways:
   a. Determine effective pricing and rate for a transaction leg, and accumulate pre-calculated charges in a pass through billable charge based on the distribution code, currency code, description on bill, aggregation parameter group ID (which is created based on the rate component characteristics). The pass through billable charge is then billed during billing.
   b. Determine effective pricing for a transaction leg, aggregate the transaction legs, determine rate for aggregated service quantities, and then accumulate pre-calculated charges in a pass through billable charge based on the distribution code, currency code, description on bill, aggregation parameter group ID (which is created based on the rate component characteristics). The pass through billable charge is then billed during billing.

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c. Determine effective pricing and rate for a transaction leg and create a pass through billable charge for the transaction leg which is billed during billing.

3. **Ignore the Transaction Leg for Billing** - In this approach, you can use either of the following ways:

a. Determine effective pricing for a transaction leg, but the billable charge is not created for the transaction leg.

b. Determine effective pricing and rate for a transaction leg, but the billable charge is not created for the transaction leg.

Note:

Once the rate is determined for transaction legs, a set of rate component characteristics and their values are grouped. For example, if a price assignment has the following rate components, the system creates two groups - Group A and Group B:

- RC1, Char1=Y, Char2=Y
- RC2, Char1=N, Char2=Y
- RC3, Char1=Y, Char2=Y

Group A contains Char1=Y, Char2=Y and Group B contains Char1=N, Char2=Y. These groups are used for accumulating pre-calculated charges. A unique aggregation parameter group ID is generated for each group. If a group with a set of rate component characteristics and their values already exists in the system, a new group is not created. Instead, the existing group is used for accumulating pre-calculated charges. The aggregation parameter group ID is created when you attach an algorithm of the **C1_RTCL_POPC** algorithm type on the **TFM - Rate Post-Processing** algorithm entity in the **Algorithms** tab of the **Division** screen. Note that the system invokes the algorithm which is attached on the derived account's division and not on the division to which the transaction belongs.

While defining a price item pricing, you need to specify the rating criteria which indicates how and when you want to the rate the transaction legs. The valid values are:

- Do Not Rate Transactions (DNRT)
- Aggregate transactions and then rate aggregated SQs (AGTR)
- Rate individual transactions and aggregate calc lines across transactions (RITA)
- Rate Transactions (RITX)

Along with the **Rating Criteria** field, the **Ignore Transaction** and **Aggregate Transaction** fields help the system to determine how and when the corresponding transaction leg must be rated. The following table indicates how to configure the system in order to use the above mentioned ways:

Transaction Rating Approach and Way	Ignore Transaction (Yes or No)	Aggregate Transaction (Yes or No)	Rating Criteria	Batch in which the Rate is Determined
3a	Yes	Not applicable	Do Not Rate Transactions (DNRT)	Not applicable because ignored transactions are not considered for billing.
3b	Yes	Not applicable	Rate Transactions (RITX)	Update Status (C1-TXNEX)
1b	No	Yes	Do Not Rate Transactions (DNRT)	Not applicable because the rate is determined during billing.
2b	No	Yes	Aggregate transactions and then rate aggregated SQs (AGTR)	Service Quantity Calculation (C1-TXNSQ)

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Transaction Rating Approach and Way	Ignore Transaction (Yes or No)	Aggregate Transaction (Yes or No)	Rating Criteria	Batch in which the Rate is Determined
2a	No	Yes	Rate individual transactions and aggregate calc lines across transactions (RITA)	Update Status (C1-TXNEX)
1a	No	No	Do Not Rate Transactions (DNRT)	Not applicable because the rate is determined during billing.
2c	No	No	Rate Transactions (RITX)	Service Quantity Calculation (C1-TXNSQ)

Let us understand the following transaction rating ways with the help of an example:

- 2a
- 2b
- 2c

The following table lists the account, price item, and price item parameters combination to which transaction T1 and T2 are mapped:

Transaction	Transaction Volume	Transaction Date	Account	Price Item	Price Item Parameter Group ID	Price Assignment ID	Aggregation Schedule
T1	300	01/01/2015	A1	P1	PG1	PA1	Monthly
T1	300	01/01/2015	A2	P1	PG1	PA2	Monthly
T2	200	15/01/2015	A1	P1	PG1	PA1	Monthly
T2	200	15/01/2015	A3	P1	PG1	PA3	Monthly

The following table lists the rate components available on the PA1, PA2, and PA3 price assignments:

Transaction	Price Assignment ID	Rate Component	Currency Code	Distribution Code	Description on Bill	Aggregation Parameter Group ID (Rate Component's Characteristics)
T1	PA1	RC1-0.1*Transaction Volume	USD	BK-AR1	XYZ	Char1=Y
T1	PA1	RC2-0.2*Transaction Volume	USD	BK-AR2	ABC	Char2=Y
T1	PA2	RC3-0.3*Transaction Volume	USD	BK-AR3	XYZ	Char1=Y

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Transaction	Price Assignment ID	Rate Component	Currency Code	Distribution Code	Description on Bill	Aggregation Parameter Group ID (Rate Component's Characteristics)
T1	PA2	RC4-0.2*Transaction Volume	USD	BK-AR4	ABC	Char2=Y
T2	PA1	RC1-0.1*Transaction Volume	USD	BK-AR1	XYZ	Char1=Y
T2	PA1	RC2-0.2*Transaction Volume	USD	BK-AR2	ABC	Char2=Y
T2	PA3	RC3-0.3*Transaction Volume	USD	BK-AR3	XYZ	Char1=Y
T2	PA3	RC4-0.2*Transaction Volume	USD	BK-AR3	XYZ	Char1=Y

Now, if you use **RITA (2a)** approach, the system will rate a transaction leg and accumulate pre-calculated charges in a pass through billable charge based on the distribution code, currency code, description on bill, aggregation parameter group ID, as shown in the following table:

Billable Charge	Start Date	End Date	Transaction Leg	Rate Component	Calculation Details	Pass Through Charge ($)	Comments
BC1	01/01/2015	31/01/2015	T1-A1P1PG1-PA1, T2-A1P1PG1-PA1	RC1	300*0.1 = 30, 200*0.1 = 20	30+20 = 50	The pass through charge is calculated for each transaction leg and then accumulated because the distribution code, currency code, description on bill, and characteristics of the rate components are same.
BC1	01/01/2015	31/01/2015	T1-A1P1PG1-PA1, T2-A1P1PG1-PA1	RC2	300*0.2 = 60, 200*0.2 = 40	60+40 = 100	The pass through charge is calculated for each transaction leg and then accumulated because the distribution code, currency code, description on bill, and characteristics

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Billable Charge	Start Date	End Date	Transaction Leg	Rate Component	Calculation Details	Pass Through Charge ($)	Comments
							of the rate components are same.
BC2	01/01/2015	31/01/2015	T1-A2P1PG1-PA2	RC3	300*0.3 = 90	90	The pass through charge is calculated for the transaction leg.
BC2	01/01/2015	31/01/2015	T1-A2P1PG1-PA2	RC4	300*0.2 = 60	60	The pass through charge is calculated for the transaction leg.
BC3	01/01/2015	31/01/2015	T2-A3P1PG1-PA3	RC3, RC4	200*0.3 = 60, 200*0.2 = 40	60+40 = 100	The pass through charges are calculated for the transaction leg and then accumulated because the distribution code, currency code, description on bill, and characteristics of the rate components are same.

In the above example, the BC1 and BC2 will have two pass through lines, whereas the BC3 will have one pass through line.

Now, if you use **RITX (2c)** approach, the system will rate a transaction leg and calculate charges for each transaction leg in a separate pass through billable charge, as shown in the following table:

Billable Charge	Start Date	End Date	Transaction Leg	Rate Component	Calculation Details	Pass Through Charge ($)	Comments
BC1	01/01/2015	31/01/2015	T1-A1P1PG1-PA1	RC1	300*0.1 = 30	30	The pass through charge is calculated for the transaction leg.
BC1	01/01/2015	31/01/2015	T1-A1P1PG1-PA1	RC2	300*0.2 = 60	60	The pass through charge is calculated for the transaction leg.
BC2	01/01/2015	31/01/2015	T1-A2P1PG1-PA2	RC3	300*0.3 = 90	90	The pass through charge is calculated for

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Billable Charge	Start Date	End Date	Transaction Leg	Rate Component	Calculation Details	Pass Through Charge ($)	Comments
							the transaction leg.
BC2	01/01/2015	31/01/2015	T1-A2P1PG1-PA2	RC4	300*0.2 = 60	60	The pass through charge is calculated for the transaction leg.
BC3	01/01/2015	31/01/2015	T2-A1P1PG1-PA1	RC1	200*0.1 = 20	20	The pass through charge is calculated for the transaction leg.
BC3	01/01/2015	31/01/2015	T2-A1P1PG1-PA1	RC2	200*0.2 = 40	40	The pass through charge is calculated for the transaction leg.
BC4	01/01/2015	31/01/2015	T2-A3P1PG1-PA3	RC3, RC4	200*0.3 = 60, 200*0.2 = 40	60+40 = 100	The pass through charges are calculated for the transaction leg and then accumulated because the distribution code, currency code, description on bill, and characteristics of the rate components are same.

In the above example, the BC1, BC2, and BC3 will have two pass through lines, whereas the BC4 will have one pass through line.

Now, if you use **AGTR (2b)** approach, the system will determine effective pricing for a transaction leg, aggregate the transaction legs, determine rate for aggregated service quantities, and then accumulate pre-calculated charges in a pass through billable charge based on the distribution code, currency code, description on bill, aggregation parameter group ID (which is created based on the rate component characteristics), as shown in the following table:

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Account-Price Item-Price Item Parameter Group-Price Assignment-Aggregation Schedule	**Total Transaction Volume**	**Billable Charge**	**Start Date**	**End Date**	**Rate Component**	**Calculation Details**	**Pass Through Charge ($)**	**Comments**
A1P1PG1-PA1-Monthly	300+200 = 500	BC1	01/01/2015	31/01/2015	RC1	500*0.1 = 50	50	The transaction volume of T1 and T2 legs having the same price item and price item parameters combination and whose transaction date falls between the aggregation schedule is first aggregated and then pass through charge is calculated for aggregated service quantities.
A1P1PG1-PA1-Monthly	300+200 = 500	BC1	01/01/2015	31/01/2015	RC2	500*0.2 = 100	100	The transaction volume of T1 and T2 legs having the same price item and price item parameters combination and whose transaction date falls between the aggregation schedule is first aggregated and then pass through charge is calculated for aggregated service quantities.
A2P1PG1-PA2-Monthly	300	BC2	01/01/2015	31/01/2015	RC3	300*0.3 = 90	90	The pass through charge is calculated for the transaction leg.

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Account-Price Item-Price Item Parameter Group-Price Assignment-Aggregation Schedule	Total Transaction Volume	Billable Charge	Start Date	End Date	Rate Component	Calculation Details	Pass Through Charge ($)	Comments
A2P1PG1-PA2-Monthly	300	BC2	01/01/2015	31/01/2015	RC4	300*0.2 = 60	60	The pass through charge is calculated for the transaction leg.
A3P1PG1-PA3-Monthly	200	BC3	01/01/2015	31/01/2015	RC3, RC4	200*0.3 = 60, 200*0.2 = 40	60+40 = 100	The pass through charges are calculated for the transaction leg and then accumulated because the distribution code, currency code, description on bill, and characteristics of the rate components are same.

In the above example, the BC1 and BC2 will have two pass through lines, whereas the BC3 will have one pass through line.

Transaction Aggregation

The transaction aggregation process includes the following sub-processes:

- Header Validation on page 1140
- Transaction Validation and Initial Price Item Determination (Specific to Health Insurance Domain) on page 1142
- Price Item Pricing Verification on page 1152
- Aggregation on page 1157
- Clean Up on page 1160

The following figure graphically explains the transaction aggregation process:

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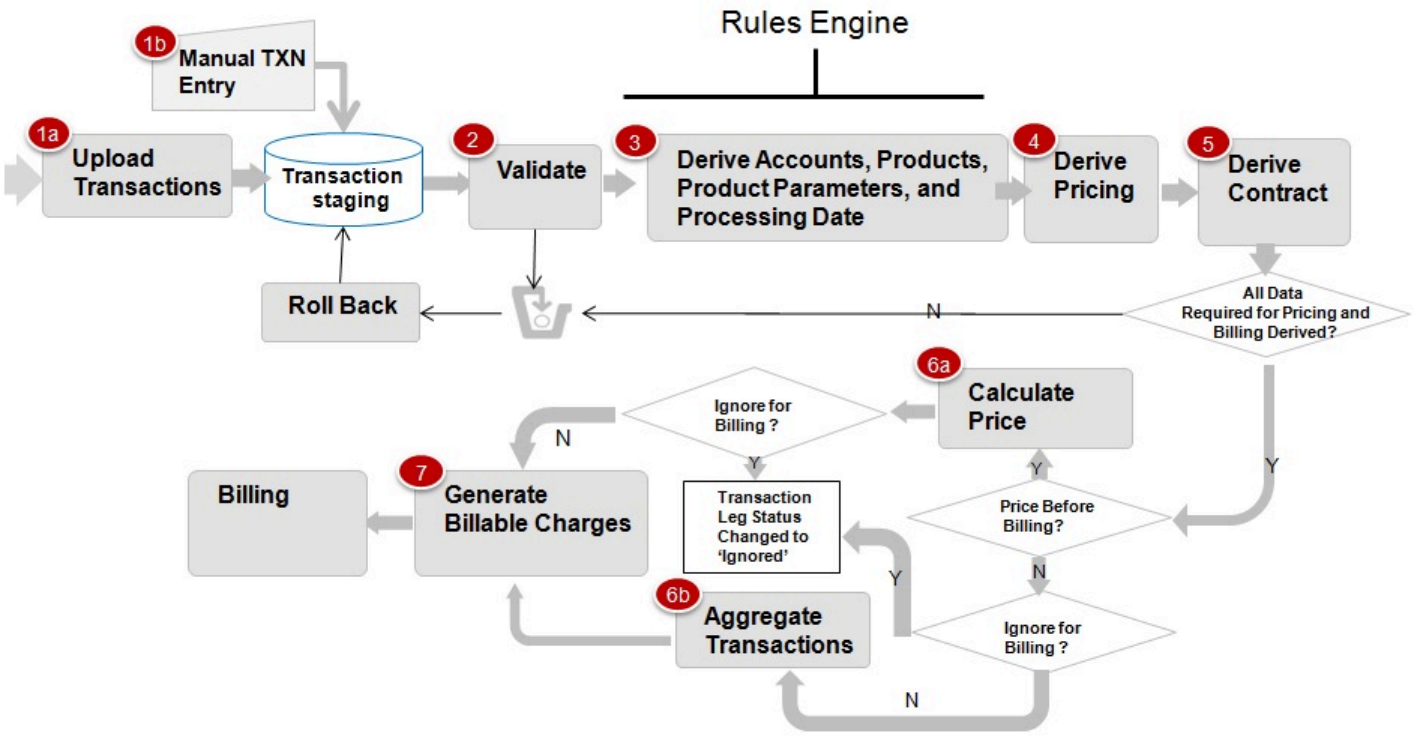

Header Validation

Once the file is uploaded in the system, you can execute the **Header Validation (C1-TXNHV)** batch to validate the file or header level information. It checks whether:

- Transaction Header ID and Transaction Source is available in the header.
- At least one transaction record is available in the file.
- The number of transaction records in the file matches the total transaction records in the header.
- The sum of transaction amount matches the total transaction amount in the header.
- The sum of transaction volume matches the total transaction volume in the header.
- File with the same header date and transaction header ID is not available in the system.
- External reference number is specified in each transaction record of the file.

If the file or header information is validated successfully, the status of the file or feed is changed to **Validated (VALI)** and the status of all transactions in the feed remains as **Uploaded (UPLD)**. However, if the header validation fails, the status of the feed and all transactions in the feed is changed to **Invalid (INVL)**.

The **Header Validation (C1-TXNHV)** batch is a multi-threaded batch. You can specify either of the following parameters while executing this batch:

Parameter Name	Description	Mandatory (Yes or No)
Transaction Header ID	Used when you want to validate a particular transaction feed.	No
Transaction Source	Used when you want to validate the transaction feeds which are received from a particular transaction source.	No

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Parameter Name	Description	Mandatory (Yes or No)
Checksum Validation Required	Used to indicate whether the following should be validated: • The number of transaction records in the file matches the total transaction records in the header. • The sum of transaction amount matches the total transaction amount in the header. • The sum of transaction volume matches the total transaction volume in the header. The valid values are: • Y • N	No
Duplicate Check Required	Used to indicate whether the following should be validated: • File with the same header date and external header ID is not available in the system. The valid values are: • Y • N **Note:** The duplicate check is done only against the transaction feeds which are in the **Validated (VALI)** status and not against the transaction feeds which are in the **Uploaded (UPLD)** status.	No
Allow Positive Transaction Volume in Header	Used to indicate whether you want to allow positive value in the total transaction volume which is specified in the header record. The valid values are: • Y • N **Note:** By default, the parameter value is set to **Y**.	Yes
Allow Negative Transaction Volume in Header	Used to indicate whether you want to allow negative value in the total transaction volume which is specified in the header record. The valid values are: • Y • N **Note:** By default, the parameter value is set to **N**.	Yes
Allow Zero Transaction Volume in Header	Used to indicate whether you want to allow zero value in the total transaction volume which is specified in the header record. The valid values are: • Y • N **Note:** By default, the parameter value is set to **N**.	Yes

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Parameter Name	Description	Mandatory (Yes or No)
Thread Pool Name	Used to specify the thread pool on which you want to execute the batch.	No

Transaction Validation and Initial Price Item Determination (Specific to Health Insurance Domain)

This process includes the following two sub-processes:

- **Transaction Validation** - In this sub-process, the transaction records are validated. The transaction level validations are done to check the integrity of the data. During the transaction validation, the system checks whether:
  - Transaction source is defined in the system.
  - Transaction record type is defined for the transaction source in the system.
  - Division and currencies are defined in the system.
  - The account with the specified account identifier, account identifier type and division exists in the system.

    Note: This validation is done when the **Transaction Detail Account Validation** option type of the **Feed Management (C1_FM)** feature configuration is set to **Y**. If you set the **Transaction Detail Account Validation** option type of the **Feed Management (C1_FM)** feature configuration to **N**, the system overrides the transaction's account identifier type, account identifier, and division with the first derived account's account identifier type, account identifier, and division, respectively.
  - User ID (if available in the transaction information) is defined in the system.
  - The value other than ‘Y’ or ‘N’ is not specified in the **Manual Switch** column.
  - The value other than ‘+’ or ‘-’ is not specified in the **Credit/Debit Indicator** column.
  - Transaction Amount is specified when Transaction Currency is specified, and vice versa.
  - Additional Amount 1 is specified when Amount 1 Currency Code is specified, and vice versa.
  - Additional Amount 2 is specified when Amount 2 Currency Code is specified, and vice versa.
  - Additional Amount 3 is specified when Amount 3 Currency Code is specified, and vice versa.
  - Additional Amount 4 is specified when Amount 4 Currency Code is specified, and vice versa.
  - Additional Amount 5 is specified when Amount 5 Currency Code is specified, and vice versa.
  - Additional Amount 6 is specified when Amount 6 Currency Code is specified, and vice versa
  - Additional Amount 7 is specified when Amount 7 Currency Code is specified, and vice versa
  - Additional Amount 8 is specified when Amount 8 Currency Code is specified, and vice versa
  - Additional Amount 9 is specified when Amount 9 Currency Code is specified, and vice versa
  - Additional Amount 10 is specified when Amount 10 Currency Code is specified, and vice versa

  If the transaction information is invalid or incorrect (for example, division is invalid), the status of the transaction is changed to **Error (EROR)**. But, if the transaction information is not available, the status of the transaction is changed to **Invalid (INVL)**.
- **Pricing Rule Type or Rule Type Determination** - If the transaction validation is successful, the system checks whether a primary pricing rule type is specified in the respective transaction record type. If a primary pricing rule type is specified in the transaction record type, the system calls the primary pricing rule type and invokes the algorithms which are attached to the following system events of the primary pricing rule type in the specified sequence:

  1. **Transaction Validation** - At present, the product has not shipped an algorithm type for the **Transaction Validation** system event. If required, you can create a custom algorithm type which validates the transaction before deriving the transaction legs.
  2. **Bill Group Derivation** - For more information, refer to the Bill Group Derivation on page 3323 section.
  3. **Account and Price Item Derivation** - Depending on the category to which the pricing rule type belongs, you need to attach different algorithm to the **Account and Price Item Derivation** system event. The following table lists the algorithms that you can attach to a primary pricing rule types with different category:

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Pricing Rule Type Category	Algorithm	For more information on how the system derives the transaction legs, refer to...
Claim	C1_ACCPRIDRV	Account and Price Item Derivation (for the Claim Pricing Rule Type Category) on page 3325
Retention Type Enrollment Based	C1_ACCPRIDRV	Account and Price Item Derivation (for the Retention Type Enrollment Based Pricing Rule Type Category) on page 3348
Ancillary	C1_ACCPRIDRV	Account and Price Item Derivation (for the Ancillary Pricing Rule Type Category) on page 3356

Once the primary pricing rule type is called, the system calls the eligible related pricing rule types (if any) defined in the primary pricing rule type. Note that the related pricing rule types are called one by one in the specified sequence. The system invokes the algorithms which are attached to the following system events of the related pricing rule type in the specified sequence:

1. **Transaction Validation** - At present, the product has not shipped an algorithm type for the **Transaction Validation** system event. If required, you can create a custom algorithm type which validates the transaction before deriving the transaction legs.
2. **Account and Price Item Derivation** - Depending on the category to which the pricing rule type belongs, you need to attach different algorithm to the **Account and Price Item Derivation** system event. The following table lists the algorithms that you can attach to a related pricing rule type with different category:

Pricing Rule Type Category	Algorithm	For more information on how the system derives the transaction legs, refer to...
Specific Stop-Loss	C1_ACCPRISL	Account and Price Item Derivation (for the Specific Stop-Loss and Aggregate Stop-Loss Pricing Rule Type Categories) on page 3330
Aggregate Stop-Loss	C1_ACCPRISL	Account and Price Item Derivation (for the Specific Stop-Loss and Aggregate Stop-Loss Pricing Rule Type Categories) on page 3330
Retention Type Claim Based	C1_ACCPRIDRV	Account and Price Item Derivation (for the Retention Type Claim Based Pricing Rule Type Category) on page 3339

However, if a primary pricing rule type is not specified in the transaction record type, the system determines the account which will bear the charges for the transaction and the price item and variance parameter or price item parameters to which the transaction will be mapped using rules which are invoked through the rule type. Depending on the transaction record type, a rule type is invoked for each transaction. The effective rules with the specified rule type are executed, starting with the rule having highest priority, until a rule is satisfied. For example, a rule with the priority 10 will be executed before a rule with the priority 20.

Note: The system determines rules which are effective based on the **TFM - Processing Date** characteristic defined for the division to which the transaction belongs. The system uses the **TFM - Processing Date** characteristic which is effective on the transaction date. If the **TFM - Processing Date** characteristic type is set to `BATCH_DT`, the system executes rules which are effective on the batch business date. However, if the **TFM - Processing Date** characteristic type is set to `TXN_DT`, the system executes rules which are effective on the transaction date. Note that the transaction date must be earlier than or equal to the batch business date. And, if the **TFM - Processing Date** characteristic is not defined for the division to which a transaction belongs, the system, by default, executes rules which are effective on the transaction date.

Each rule contains one or more conditions or criteria. For example, Rule A states that if the transaction record type is R001 and the division is New York, then set the following output parameters:

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- ACCT_NO1_Val - Account 1
- DIVISION1_VAL - D1
- PRODUCT1_1_Val - Price Item X

Here, Transaction Record Type = R001 and Division = New York are two conditions. If these two conditions in the rule are satisfied, then set three output parameters - ACCT_NO1_Val, DIVISION1_VAL and PRODUCT1_1_Val. Now, when this rule is executed and the transaction satisfies this criteria, the transaction is mapped to Price Item X and Account 1 which belongs to D1 bears the charges for the transaction. In case, the rule has four output parameters (ACCT_NO1_Val set to Account 1, DIVISION1_VAL set to D1, PRODUCT1_1 Val set to Price Item X, and PRODUCT1_2_Val set to Price Item Y), the transaction will be mapped to both the price items (i.e. Price Item X and Price Item Y) and Account 1 which belongs to D1 bears the charges for the transaction. A transaction can be mapped to one or more price items or to one or more price item and TOU (variance parameter) combinations. If the multi parameter based pricing feature is enabled, you can map a transaction to one or more price item and price item parameters combinations. Let us understand this with the help of an example.

Rule B states that if the transaction is performed in US and the transaction amount exceeds 1000 USD, then set the following output parameters:

- ACCT_NO1_Val - Account A
- DIVISION1_VAL - D1
- PRODUCT1_1_Val - Price Item X
- PCD1_1_1_VAL - Country
- PVL1_1_1_VAL - US
- PCD1_1_2_VAL - Currency
- PVL1_1_2_VAL - USD
- PRODUCT1_2_Val - Price Item Y
- PCD1_2_1_VAL - Country
- PVL1_2_1_VAL - US
- PCD1_2_2_VAL - Currency
- PVL1_2_2_VAL - USD

Now, when this rule is executed and the transaction satisfies the criteria, Account A which belongs to D1 bears the charges for the transaction which is mapped to the following price item and price item parameters combinations:

- Price Item X, Country - US, Currency - USD
- Price Item Y, Country - US, Currency - USD

More than one account can bear the charges for a transaction and each account can belong to a different division. You can map a transaction to one or more price items, to one or more price item and TOU (variance parameter) combinations, or to one or more price item and price item parameters combinations. The system allows you to map price items for each account. For example, Rule C states that if the transaction is performed in UK and the transaction amount exceeds 1000 USD, then set the following output parameters:

- ACCT_NO1_Val - Account A
- DIVISION1_VAL - D1
- PRODUCT1_1_Val - Price Item X
- PCD1_1_1_VAL - Country
- PVL1_1_1_VAL - UK
- PCD1_1_2_VAL - Currency
- PVL1_1_2_VAL - USD
- PRODUCT1_2_Val - Price Item Y
- PCD1_2_1_VAL - Country
- PVL1_2_1_VAL - UK
- PCD1_2_2_VAL - Currency
- PVL1_2_2_VAL - USD
- ACCT_NO2_Val - Account B

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- DIVISION2_VAL - D2
- PRODUCT2_1_Val - Price Item A
- PCD2_1_1_VAL - Country
- PVL2_1_1_VAL - US
- PCD2_1_2_VAL - Currency
- PVL2_1_2_VAL - USD

Now, when this rule is executed and the transaction satisfies the criteria, the transaction is mapped to the following price item and price item parameters combinations:

Charges Borne By	**Division to which the account belongs...**	**Price Item**	**Country**	**Currency**
Account A	D1	Price Item X	UK	USD
Account A	D1	Price Item Y	UK	USD
Account B	D2	Price Item A	US	USD

You can limit the maximum accounts that can bear the charges for a transaction, maximum price item that can be mapped to a transaction, and maximum parameters that can be used with each price item to determine price item pricing. For more information, see Defining a Transaction Record Type on page 1264. You can also define rules to ignore transactions based on the transaction attributes. If the rule returns the **IGNORE_SW** equal to **Y**, the status of the transaction is changed to **Ignored (IGNR)** and no further processing takes place on the transaction.

You can use the following output parameters while defining rules in the system:

Output Parameter	**Naming Convention**	**Example**	**Description**
Account Identifier	ACCT_NOX_Val	ACCT_NO1_Val, ACCT_NO2_Val, ACCT_NO3_Val, ...	Used to indicate the account which must bear the charges for the transaction.
Account Identifier Column Name	ACCT_NOX_Col	ACCT_NO1_Col, ACCT_NO2_Col, ACCT_NO3_Col, ...	Used to indicate the column from where the account identifier corresponding to the transaction (in the transaction details) must be picked.
Account Identifier Type	ACCT_NO_TYPEX_Val	ACCT_NO_TYPE1_Val, ACCT_NO_TYPE2_Val, ACCT_NO_TYPE3_Val, ...	Used to indicate the type of account identifier.
Account Identifier Type Column Name	ACCT_NO_TYPEX_Col	ACCT_NO_TYPE1_Col, ACCT_NO_TYPE2_Col, ACCT_NO_TYPE3_Col, ...	Used to indicate the column from where the account identifier type corresponding to the transaction (in the transaction details) must be picked.
Account Division	DIVISIONX_VAL	DIVISION1_VAL	Used to indicate the division to which the account belongs.
Account Division Column Name	DIVISIONX_COL	DIVISION1_COL	Used to indicate the column from where the division corresponding to the transaction (in the transaction details) must be picked.
Price Item Name	PRODUCTX_Y_Val	PRODUCT1_1_Val, PRODUCT2_1_Val, PRODUCT2_2_Val, ...	Used to indicate the price item to which the transaction must be mapped.

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Output Parameter	Naming Convention	Example	Description
	Note: Here, X represents the account and Y represents the price item.		
Price Item Column Name	PRODUCTX_Y_Col **Note:** Here, X represents the account and Y represents the price item.	PRODUCT1_1_Col,, PRODUCT2_1_Col, PRODUCT2_2_Col, ...	Used to indicate the column from where the price item corresponding to the transaction (in the transaction details) must be picked.
TOU	TOUX_Y_Val **Note:** Here, X represents the account and Y represents the price item.	TOU1_1_Val, TOU2_1_Val, TOU2_2_Val, ...	Used to indicate the variance parameter which you want to use along with the price item for price determination. **Note:** This output parameter appears when the **Multi Price Parameter** option type of the **Multi Parameter Based Pricing (C1_PPARM_FLG)** feature configuration is set to **False**.
TOU Column Name	TOUX_Y_Col **Note:** Here, X represents the account and Y represents the price item.	TOU1_1_Col, TOU2_1_Col, TOU2_2_Col, ...	Used to indicate the column from where the variance parameter corresponding to the transaction (in the transaction details) must be picked. **Note:** This output parameter appears when the **Multi Price Parameter** option type of the **Multi Parameter Based Pricing (C1_PPARM_FLG)** feature configuration is set to **False**.
Parameter Code **Note:** At present, the system does not support the Parameter Code Column output parameter.	PCDX_Y_Z_VAL **Note:** Here, X represents the account, Y represents the price item, and Z represents the parameter.	PCD1_1_1_VAL, PCD1_2_1_VAL, PCD2_1_1_VAL, ...	Used to indicate the parameter which you want to use along with the price item for price determination. **Note:** This output parameter appears when the **Multi Price Parameter** option type of the **Multi Parameter Based Pricing (C1_PPARM_FLG)** feature configuration is set to **True**. You must not specify any special character except underscore (_) in the parameter code. Otherwise, the status of the transaction is changed to **Error (EROR)**.
Parameter Value	PVLX_Y_Z_VAL	PVL1_1_1_VAL, PVL1_2_1_VAL, PVL2_1_1_VAL, ...	Used to specify the value for the parameter.

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Output Parameter	Naming Convention	Example	Description
	Note: Here, X represents the account, Y represents the price item, and Z represents the parameter.		**Note:** This output parameter appears when the **Multi Price Parameter** option type of the **Multi Parameter Based Pricing (C1_PPARM_FLG)** feature configuration is set to **True**. The parameter value must not contain the equal to (=) and tilde (~) symbols. Otherwise, the status of the transaction is changed to **Error (EROR)**.
Parameter Value Column Name	PVLX_Y_Z_COL **Note:** Here, X represents the account, Y represents the price item, and Z represents the parameter.	PVL1_1_1_COL, PVL1_2_1_COL, PVL2_1_1_COL, ...	Used to indicate the column from where the parameter value corresponding to the transaction (in the transaction details) must be picked. **Note:** This output parameter appears when the **Multi Price Parameter** option type of the **Multi Parameter Based Pricing (C1_PPARM_FLG)** feature configuration is set to **True**. The column from where the parameter value is picked must not contain the equal to (=) and tilde (~) symbols. Otherwise, the status of the transaction is changed to **Error (EROR)**.
Processing Date Type	PRCS_DTX_Y_TYP **Note:** Here, X represents the account and Y represents the price item.	PRCS_DT1_1_TYP, PRCS_DT1_2_TYP, PRCS_DT2_1_TYP, ...	Used to indicate the date type using which you want to determine the effective price item parameters, pricing, and exchange rate. The valid values are: • **TXN_DT** - Used when you want to determine price item parameters, pricing, and exchange rate which are effective on the transaction date. • **Batch_DT** - Used when you want to determine price item parameters, pricing, and exchange rate which are effective on the batch business date.

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Output Parameter	Naming Convention	Example	Description
			Note: Based on the **TFM - Processing Date** characteristic defined for the division to which a transaction belongs, the system determines the rules, price item parameters, pricing, and exchange rate which are effective on the transaction or batch business date. The price item parameters, pricing, and exchange rate which are effective is determined for all account and price item combinations to which the transaction is mapped. If you want to use a custom processing date for a particular account and price item combination to which the transaction is mapped, you need to set the PRCS_DTX_Y_TYP output parameter. In other words, the PRCS_DTX_Y_TYP output parameter helps you to override the processing date for a particular account and price item combination. However, the overridden processing date is used only while determining effective price item parameters, pricing, and exchange rate.
Processing Date	PRCS_DTX_Y_VAL **Note:** Here, X represents the account and Y represents the price item.	PRCS_DT1_1_VAL, PRCS_DT1_2_VAL, PRCS_DT2_1_VAL, ...	Used to specify a custom date on which you want to determine the effective price item parameters, pricing, and exchange rate.

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Output Parameter	Naming Convention	Example	Description
			Note: The custom date must be a date other than the transaction or batch business date. Based on the **TFM - Processing Date** characteristic defined for the division to which a transaction belongs, the system determines the rules, price item parameters, pricing, and exchange rate which are effective on the transaction or batch business date. The price item parameters, pricing, and exchange rate which are effective is determined for all account and price item combinations to which the transaction is mapped. If you want to use a custom processing date for a particular account and price item combination to which the transaction is mapped, you need to set the PRCS_DTX_Y_VAL output parameter. In other words, the PRCS_DTX_Y_VAL output parameter helps you to override the processing date for a particular account and price item combination. However, the overridden processing date is used only while determining effective price item parameters, pricing, and exchange rate.
Ignore Transaction	IGNORE_SW		Used to ignore transactions based on the transaction attributes. The valid values are: • Y • N

Once the transaction satisfies any rule (invoked through the rule type), one transaction leg is created for each account, division, price item, and variance parameter or price item parameters combination. Let us understand this with the help of an example. The following table lists the accounts and price items to which T1, T2, and T3 are mapped:

Transaction	Charges Borne By	Division to which the account belongs...	Price Item	Variance Parameter	Price Item Parameters
T1	A1	D1	P1	-	Country - US, Currency - USD
T1	A1	D1	P2	-	Country - Germany, Currency - USD
T1	A2	D2	P3	USD	-

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Transaction	Charges Borne By	Division to which the account belongs...	Price Item	Variance Parameter	Price Item Parameters
T2	A1	D1	P1	-	Country - US, Currency - USD
T2	A2	D2	P2	USD	-
T3	A1	D1	P3	-	Country - Germany, Currency - USD

In such case, the system will create three legs for T1, two legs for T2, and one leg for T3. Each transaction leg will have its own status. The status of the transaction legs and transaction is changed to **Initial Price Item Determined (INPD)**. However, if a transaction does not satisfy any rule, the status of the transaction is changed to **Error (EROR)**.

Note:

During this sub-process, the system validates the following:

- Whether the price item parameters specified in the output parameters are effective for the price item on the processing date.
- Whether the mandatory price item parameter which is effective on the processing date is specified in the output parameter.
- Whether the parameter value is specified for all mandatory price item parameters which are effective on the processing date.

If any of the above validation fails, the status of the transaction is changed to **Error (EROR)** and no transaction legs are created.

Once the transaction legs are created, the price item parameters of each transaction leg are grouped. For example, when a transaction is mapped to the following price item and price item parameters combinations, the system creates three groups - Group A, Group B, and Group C:

- Account A, Price Item X, Country - US, Currency - USD
- Account A, Price Item Y, Country - Germany, Currency - USD
- Account B, Price Item X, Country - England, Currency - USD

Group A contains Country - US, Currency - USD; Group B contains Country - Germany, Currency - USD; and Group C contains Country - England, Currency - USD.

A set of price item parameters are grouped when the multi parameter based pricing feature is enabled. A group is used to determine the price item pricing. A unique group ID is generated for each group. If a group with a set of price item parameters already exists in the system, a new group is not created. Instead, the existing group is used for determining the price item pricing.

You can execute this process through a multi-threaded batch named **Validate Transaction and Derive Price Item (C1-TXNIP)**. You can specify the following parameters while executing this batch:

Parameter Name	Description	Mandatory (Yes or No)
Batch Business Date	Used to identify the transactions for which you want to perform validation and determine price item. The system considers the transactions whose transaction date is earlier than or equal to the batch business date.	No

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Parameter Name	Description	Mandatory (Yes or No)
	Note: If you do not specify any date, the batch business date is set to the current date. The batch business date used while executing the **C1-TXNIP** batch is stamped in the database. It is then used while executing all other consequent batches in the transaction aggregation cycle.	
Transaction Header ID	Used when you want to validate and derive price item for the transactions which are received in a particular transaction feed.	No
Transaction Source	Used when you want to validate and derive price item for the transactions which are received from a particular transaction source.	No
Division	Used when you want to validate and derive price item for the transactions belonging to a particular division.	No
Shuffle Work Unit	Used to indicate whether you want to shuffle the work units across threads to correct the uneven thread processing time. The valid values are: • Y • N **Note:** By default, the parameter value is set to **N**.	No
Chunk Size	Used to specify the number of transactions you want to execute in each work unit.	Yes
Maximum Batch Count	Used to specify the maximum number of transactions after which the data must be transferred to the database.	Yes
Thread Pool Name	Used to specify the thread pool on which you want to execute the batch.	No

A log is generated if the **Logging Rules for Transaction Feed** option type in the **Rule Engine (C1_RLENG)** feature configuration is set to **True**. This log indicates the rules that were executed for each transaction and whether each rule passed or failed during the execution.

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Note:

You can aggregate transaction legs in a billable charge using aggregation parameters other than account ID, price item code, variance or price item parameters, aggregation start date, and aggregation end date. The additional aggregation parameters can be stamped in the form of aggregation parameter group ID while performing post-processing activities for each transaction leg. This aggregation parameter group ID will be used in subsequent batches during the transaction aggregation cycle. If you want to perform some post-processing activities on the transaction legs, you need to attach a post-processing algorithm on the **TFM - Price Item Derivation Post-Processing** algorithm entity in the **Algorithms** tab of the **Division** screen. Note that the system invokes the algorithm which is attached on the division to which the transaction belongs. This algorithm is triggered only for transactions which are in the **Initial Price Item Determined (INPD)** status. It is triggered before the price item parameter group is created.

A sample post-processing algorithm type named **C1_PRDR_POPC** is shipped with the price item. It does not have any business logic. If you want to undertake some post-processing activities for a transaction leg, you need to create custom algorithm type and attach the respective algorithm on the **TFM - Price Item Derivation Post-Processing** algorithm spot of the respective division. You can refer to the **C1_PRDR_POPC** algorithm type to understand the input parameters that must be passed to the custom algorithm type.

Once the **Validate Transaction and Derive Price Item (C1-TXNIP)** batch is executed, the processing date is stamped against each transaction leg in the database. If a custom processing date is specified for a particular account and price item combination, the custom processing date is stamped against the respective transaction leg. Otherwise, the processing date defined for the division to which a transaction belongs is stamped against the legs of the respective transaction. The processing date which is stamped against a transaction leg in the database is used while executing all subsequent batches in the transaction aggregation cycle.

Related Topics

For more information on...	See...
Rules Engine	Rules Engine on page 1077
How to define a rule	Defining a Rule on page 1098

Price Item Pricing Verification

In this process, the system behaves in the following manner:

If the Multi Parameter Based Pricing feature is...	Then...
Disabled	The system checks whether effective pricing is available for the account, price item or regular bundle (to which the price item belongs) or parent (regular) bundle (to which the regular bundle belongs) and/or TOU combination on the processing date. The system searches for the price item, regular bundle or parent bundle pricing depending on the value defined for the **Prefer Price Item Over Bundle** parameter in the price assignment search algorithm (which is defined for the division to which the account belongs). If the price item belongs to a regular bundle and the effective pricing is available for the regular bundle at the account level, the system considers the regular bundle as the final price item and maps it to the transaction leg. If the effective pricing is not available for the regular bundle, the system checks whether the effective pricing is available for the parent bundle (if assigned) at the account level. If the effective pricing is available for the parent bundle, the system considers the parent bundle as the final price item and maps it to the transaction leg. If the effective pricing is not available for the price item, regular bundle, or parent bundle, the status of the transaction leg is changed to **Error (EROR)**. If the effective pricing is not

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If the Multi Parameter Based Pricing feature is...	Then...
	available for one or more price items to which a transaction is mapped, the status of the transaction is also changed to **Error (EROR)**.
Enabled	The system checks whether effective pricing is available for the account, price item or regular bundle (to which the price item belongs) or parent (regular) bundle (to which the regular bundle belongs)and/or price item parameters (parameter group) combination on the processing date. The system searches for the price item, regular bundle or parent bundle pricing depending on the value defined for the **Prefer Price Item Over Bundle** parameter in the price assignment search algorithm (which is defined for the division to which the account belongs). The system searches for a price with exact match at all levels defined in the search order. If the exact match is available at two or more levels, the price assignment at the higher precedence level is considered for calculating the charges. But, if the system does not find the exact match at any level, it searches for the best fit match at all levels. For more information about best fit match, see Multi Parameter Based Pricing. If the system finds the best fit match with same weight at multiple levels, the price assignment at the higher precedence level is considered for calculating the charges. If the price item belongs to a regular bundle and the exact or best fit price is available for the regular bundle at the account level, the system considers the regular bundle as the final price item and maps it to the transaction leg. If the exact or best fit price is not available for the regular bundle, the system checks whether the exact or best fit price is available for the parent bundle (if assigned) at the account level. If the exact or best fit price is available for the parent bundle, the system considers the parent bundle as the final price item and maps it to the transaction leg. If the exact or best fit price is not available for the price item, regular bundle, or parent bundle, the status of the transaction leg is changed to **Error (EROR)**. If the exact or best fit price is not available for one or more price items to which a transaction is mapped, the status of the transaction is also changed to **Error (EROR)**.

Note:

The processing date which is stamped against a transaction leg is used to determine effective pricing for the transaction leg.

The order in which the system searches effective pricing for the price item, regular bundle, or parent (regular) bundle at the same level depends on the value defined for the **Prefer Price Item Over Bundle** parameter in the price assignment search algorithm. If the value of the **Prefer Price Item Over Bundle** parameter is set to **Y**, the system first searches whether effective pricing is available for the price item. If the effective pricing is not available for the price item, then the system searches whether effective pricing is available for the regular bundle at the same level. If the effective pricing is not available for the regular bundle, then the system searches whether effective pricing is available for the parent bundle at the same level. However, if the value of the **Prefer Price Item Over Bundle** parameter is set to **N**, the system first searches whether effective pricing is available for the parent bundle. If the effective pricing is not available for the parent bundle, then the system searches whether effective pricing is available for the regular bundle at the same level. If the effective pricing is not available for the regular bundle, then the system searches whether effective pricing is available for the price item at the same level.

In addition, the status of the transaction and transaction leg is changed to **Error (EROR)** when:

- There is no contract available with the specified contract type on the transaction date or when the contract is inactive.
- There are multiple effective contracts of the same contract type (available on the transaction date) in **Active**, **Pending Stop**, or **Stop** status.

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- The **Price Assignment Search** algorithm is not defined for the division.
- The parameter values are either not defined or invalid in the **Price Assignment Search** algorithm on the processing date.
- The period in which the transaction date falls is not defined in the aggregation schedule.

Once the effective pricing is determined for the initial or final price item, the values of the following pricing attributes are retrieved:

- Ignore Transaction
- Aggregate Transaction
- Aggregation Schedule
- Rating Criteria
- Price Assignment ID
- Account ID (in case of account agreed and price list pricing)
- Person ID (in case of customer agreed and price list pricing)
- Price List ID (in case of price list pricing)
- Contract ID
- Regular Bundle Code
- Pricing Currency

In addition, the system invokes the algorithms attached to the following algorithm spots of the derived account's division in the specified sequence for the self-funded health insurance business:

1. **TFM - Contract Derivation** - You can attach an algorithm created using the **SA_DERV_POPC** algorithm type to this algorithm spot. If the account has multiple active contracts of the contract type which is associated with the price item, this algorithm derives the contract which is associated with the policy and maps it to the transaction leg. The manner in which the system derives the active contract for the account differs in the following scenarios:

If the effective pricing rule stamped against the transaction leg is defined at ...	**Then...**
The bill group level	The system first fetches the policy derived for the transaction and then derives the active contract which is associated with the policy.
The parent customer level	The system first fetches the bill group to which the account belongs and then the policy where the bill group is associated with the policy using the policy person role which is specified in the **Bill Group Policy Person Role** option type of the **C1-ASOBLLNG** feature configuration. Once the policy is derived, the system derives the active contract which is associated with the policy.

2. **TFM - Verify Pricing Post-Processing** - You can attach an algorithm created using the **C1-VRPR_POPC** algorithm type to this algorithm spot. This algorithm removes the price assignment ID and price item parameter group ID from the summary ID column of each transaction leg.

You can execute this process through a multi-threaded batch named **Price Item Pricing Verification (C1-TXNVP)**. You can specify either of the following parameters while executing this batch:

Parameter Name	**Description**	**Mandatory (Yes or No)**
Transaction Header ID	Used when you want to find the price item pricing for transactions which are received in a particular transaction feed.	No
Transaction Source	Used when you want to find the price item pricing for transactions which are received from a particular transaction source.	No

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Parameter Name	Description	Mandatory (Yes or No)
Division	Used when you want to find the price item pricing for transactions belonging to a particular division.	No
Chunk Size	Used to specify the number of transactions you want to execute in each work unit.	Yes
Thread Pool Name	Used to specify the thread pool on which you want to execute the batch.	No

Note that the **Price Item Pricing Verification (C1-TXNVP)** batch does not change the status of the transaction and its legs. You need to execute the **Update Status (C1-TXNEX)** batch to update the status of the transaction and its legs. Besides updating the status, the **Update Status (C1-TXNEX)** batch determines the rate for transaction legs whose effective pricing has either of the following set of attributes:

- **Ignore Transaction** is set to **Yes** and **Rating Criteria** is set to **Rate Transactions (RITX)**
- **Ignore Transaction** is set to **No**, **Aggregate Transaction** is set to **Yes**, and **Rating Criteria** is set to **Rate individual transactions and aggregate calc lines across transactions (RITA)**

Each set of pricing attributes indicates how the transaction legs must be rated before billing. For more information about the different ways in which a transaction leg can be rated, see Transaction Rating Before Billing on page 1132.

You can specify either of the following parameters while executing this batch:

Parameter Name	Description	Mandatory (Yes or No)
Transaction Header ID	Used when you want to change the status of transactions which are received in a particular transaction feed.	No
Transaction Source	Used when you want to change the status of transactions which are received from a particular transaction source.	No
Division	Used when you want to change the status of transactions belonging to a particular division.	No
Shuffle Work Unit	Used to indicate whether you want to shuffle the work units across threads to correct the uneven thread processing time. The valid values are: • Y • N **Note:** By default, the parameter value is set to **N**.	No
Chunk Size	Used to specify the number of transactions you want to execute in each work unit.	Yes
Maximum Batch Count	Used to specify the maximum number of transactions after which the data must be transferred to the database.	Yes
Thread Pool Name	Used to specify the thread pool on which you want to execute the batch.	No

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Note:

You must specify same parameters in the **Product Pricing Verification (C1-TXNVP)** and **Update Status (C1-TXNEX)** batches. Otherwise, erroneous results might occur.

If you want to do some preprocessing activities before invoking the rates engine, you need to attach a preprocessing algorithm on the **TFM - Rate Pre-Processing** algorithm entity in the **Algorithms** tab of the **Division** screen. Note that the system invokes the algorithm which is attached on the derived account's division and not on the division to which the transaction belongs. A sample preprocessing algorithm type named **C1_RTCL_PRPC** is shipped with the product. It does not have any business logic. If you want to undertake some preprocessing activities before invoking the rates engine, you need to create custom algorithm type and attach the respective algorithm on the **TFM - Rate Pre-Processing** algorithm spot of the respective division. You can refer to the **C1_RTCL_PRPC** algorithm type to understand the input parameters that must be passed to the custom algorithm type.

If a transaction leg is ignored and not considered for billing, the status of the transaction leg is changed to **Ignored (IGNR)**, whereas the status of the transaction remains as **Initial Price Item Determined (INPD)**. However, if all legs of a transaction are ignored and not considered for billing, the status of the transaction and transaction legs is changed to **Ignored (IGNR)**.

You can store the price item pricing information, and thereby improve the **Price Item Pricing Verification (C1-TXNVP)** batch performance. If you set the **Use Materialized Views** option type of the **C1_FM** feature configuration to **true**, the system will store the product pricing information in the following tables:

- CI_PRC_AGRD
- CI_PRC_PL
- CI_PRC_INH_PL

But, if you set the **Use Materialized Views** option type of the **C1_FM** feature configuration to **false**, the system will not store the product pricing information in the above mentioned tables. If there are any pricing changes, you will have to update these tables before executing the **Price Item Pricing Verification (C1-TXNVP)** batch. You can update the product pricing information in these tables by executing the **Refresh Pricing (C1-TXNRP)** batch. Ideally, you must execute the **Refresh Pricing (C1-TXNRP)** batch after you execute the **Flush All Caches (F1-FLUSH)** batch in the transaction aggregation cycle. You can specify the following parameters while executing the **Refresh Pricing (C1-TXNRP)** batch:

Parameter Name	Description	Mandatory (Yes or No)
Division	Used when you want to update the price item pricing information of accounts belonging to a particular division.	No
Chunk Size	Used to specify the number of persons whose regular and post-processing price item pricing information you want to update in each work unit.	Yes
Thread Pool Name	Used to specify the thread pool on which you want to execute the batch.	No

Related Topics

For more information on...	See...
Transaction Leg Status Transition	Transaction Leg Status Transition on page 1185
How to set the **C1_FM** feature configuration	Setting the C1_FM Feature Configuration on page 4451

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Aggregation

Once the price item pricing verification is complete, you can aggregate the transaction legs, create a billable charge, and update the SQI values in the billable charge. In the aggregation process, the system behaves in the following manner:

If the Multi Parameter Based Pricing feature is...	**Then...**
Disabled	The system checks the value defined in the **Aggregate Transaction** field. If the **Aggregate Transaction** field is set to **No**, the system creates one billable charge (with the **Billable** status) for each transaction leg. However, if the **Aggregate Transaction** field is set to **Yes**, the system creates one billable charge (with the **Billable** status) for all transactions legs having the same price item and TOU combination and whose transaction date falls between the aggregation schedule.
	Note: During the billable charge creation, the system also considers the contract start and end dates along with the aggregation schedule. If the contract start date falls between the aggregation schedule, the billable charge start date is equal to the contract start date. If the contract start date is earlier than the aggregation schedule start date, the billable charge start date is equal to the aggregation schedule start date. If the contract end date is earlier than the aggregation schedule end date, the billable charge end date is equal to the contract end date. If the contract end date is later than the aggregation schedule end date, the billable charge end date is equal to the aggregation schedule end date. However, if the contract start date is later than the aggregation schedule end date or if the contract end date is earlier than the aggregation schedule start date, the status of the transaction leg is changed to **Error (EROR)**. If the aggregated billable charge already exists for the account, price item and TOU combination and there is no bill segment associated with the billable charge, the system will update the SQI values in the existing billable charge.
Enabled	The system checks the value defined in the **Aggregate Transaction** field. If the **Aggregate Transaction** field is set to **No**, the system creates one billable charge (with the **Billable** status) for each transaction leg. However, if the **Aggregate Transaction** field is set to **Yes**, the system creates one billable charge (with the **Billable** status) for all transaction legs having the same price item and price item parameters (parameter group) combination and whose transaction date falls between the aggregation schedule.

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If the Multi Parameter Based Pricing feature is...	Then...
	Note: During the billable charge creation, the system also considers the contract start and end dates along with the aggregation schedule. If the contract start date falls between the aggregation schedule, the billable charge start date is equal to the contract start date. If the contract start date is earlier than the aggregation schedule start date, the billable charge start date is equal to the aggregation schedule start date. If the contract end date is earlier than the aggregation schedule end date, the billable charge end date is equal to the contract end date. If the contract end date is later than the aggregation schedule end date, the billable charge end date is equal to the aggregation schedule end date. However, if the contract start date is later than the aggregation schedule end date or if the contract end date is earlier than the aggregation schedule start date, the status of the transaction leg is changed to **Error (EROR)**. If the aggregated billable charge already exists for the account, price item and price item parameters combination and there is no bill segment associated with the billable charge, the system will update the SQI values in the existing billable charge.

The transaction aggregation is done based on the aggregation schedule defined in the price item pricing. You can use the following standard schedules or you can create your own custom schedules for aggregation:

- Daily
- Weekly
- Monthly
- Quarterly
- Yearly

Once the billable charge is created, the system aggregates the SQIs defined for the price item - division combination using the aggregation function and then updates the billable charge with the respective SQI values. If the aggregation function is based on the transaction amount or on any other user defined amount and the transaction or user defined currency is different from the pricing currency, the system does currency conversion if the appropriate exchange rate is available in the system. The processing date which is stamped against a transaction leg is used to determine effective exchange rate for the transaction leg.

Once the SQI values are updated in the billable charge, the rate is determined for the transaction leg whose effective pricing has either of the following set of attributes:

- **Ignore Transaction** is set to **No**, **Aggregate Transaction** is set to **Yes**, and **Rating Criteria** is set to **Aggregate transactions and then rate aggregated SQs (AGTR)**
- **Ignore Transaction** is set to **No**, **Aggregate Transaction** is set to **No**, and **Rating Criteria** is set to **Rate Transactions (RITX)**

Each set of pricing attributes indicates how the transaction legs must be rated before billing. For more information about the different ways in which a transaction leg can be rated, see Transaction Rating Before Billing on page 1132.

Note: If you want to do some preprocessing activities while determining rate, you need to attach a preprocessing algorithm on the **TFM - Rate Pre-Processing** algorithm entity in the **Algorithms** tab of the **Division** screen. Note that the system invokes the algorithm which is attached on the derived account's division and not on the division to which the transaction belongs. A sample preprocessing algorithm type named **C1_RTCL_PRPC** is shipped with the price item. It does not have any business logic. If you want to undertake some preprocessing activities while determining rate for transaction legs, you need to create custom algorithm type and attach the respective algorithm on the **TFM - Rate Pre-Processing** algorithm spot of the respective division. You can refer to the **C1_RTCL_PRPC** algorithm type to understand the input parameters that must be passed to the custom algorithm type.

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In addition, the system invokes the algorithm attached to the following algorithm spot of the derived account's division for the **self-funded health insurance** business:

- **TFM - Billable Charge Post Processing** - You can attach an algorithm created using the **C1_BCHG_POPC** algorithm type to this algorithm spot. This algorithm invokes the algorithm which is attached to the **Bill After Date Determination** system event of the respective pricing rule type. For more information, refer to the Bill After Date Determination on page 3362 section.

Once the billable charge is created and updated successfully, the status of the transaction leg is changed to **Completed (COMP)**. However, if the SQIs are not defined for the price item - division combination, the transaction aggregation rule is not defined for the SQI, or if the exchange rate is not available during currency conversion, the status of the transaction leg is changed to **Error (EROR)**. If all legs of a transaction are in the **Completed (COMP)** status, the status of the transaction is changed to **Completed (COMP)**. But, if any of the transaction leg is in the **Error (EROR)** status, the status of the transaction is changed to **Error (EROR)**.

You can execute this process through a multi-threaded batch named **Service Quantity Calculation (C1-TXNSQ)**. You can specify either of the following parameters while executing this batch:

Parameter Name	Description	Mandatory (Yes or No)
Transaction Header ID	Used when you want to create the billable charges for transactions which are received in a particular transaction feed.	No
Transaction Source	Used when you want to create the billable charges for transactions which are received from a particular transaction source.	No
Division	Used when you want to create the billable charges for transactions belonging to a particular division.	No
Chunk Size	Used to specify the number of transactions you want to execute in each work unit.	Yes
Maximum Batch Count	Used to specify the maximum number of transactions after which the data must be transferred to the database.	Yes
Thread Pool Name	Used to specify the thread pool on which you want to execute the batch.	No

The **Service Quantity Calculation (C1-TXNSQ)** batch does not change the status of the transaction and its legs. You need to execute the **Mark Completion (C1-TXNCM)** batch to update the status of the transaction and its legs. Besides updating the status, the **Mark Completion (C1-TXNCM)** batch does the following with other legs when billable charge is not created for one or more transaction legs:

Rate for other transaction leg is determined using the following set of pricing attributes...	Then....
Ignore Transaction is set to **Yes** and **Rating Criteria** is set to **Rate Transactions (RITX)**	The corresponding calculation lines of the transaction leg are deleted.
Ignore Transaction is set to **No**, **Aggregate Transaction** is set to **No**, and **Rating Criteria** is set to **Rate Transactions (RITX)**	The corresponding billable charge and calculation lines of the transaction leg are deleted.
Ignore Transaction is set to **No**, **Aggregate Transaction** is set to **Yes**, and **Rating Criteria** is set to **Rate individual transactions and aggregate calc lines across transactions (RITA)**	The corresponding calculation lines of the transaction leg are deleted.

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Rate for other transaction leg is determined using the following set of pricing attributes...	**Then....**
Ignore Transaction is set to **No**, **Aggregate Transaction** is set to **Yes**, and **Rating Criteria** is set to **Aggregate transactions and then rate aggregated SQs (AGTR)**	The corresponding billable charge and calculation lines are not deleted.
Ignore Transaction is set to **No**, **Aggregate Transaction** is set to **No**, and **Rating Criteria** is set to **Do Not Rate Transactions**	The corresponding non-aggregated billable charge is deleted.

You can specify either of the following parameters while executing the **Mark Completion (C1-TXNCM)** batch:

Parameter Name	**Description**	**Mandatory (Yes or No)**
Transaction Header ID	Used when you want to change the status of transactions which are received in a particular transaction feed.	No
Transaction Source	Used when you want to change the status of transactions which are received from a particular transaction source.	No
Division	Used when you want to change the status of transactions belonging to a particular division.	No
Chunk Size	Used to specify the number of transactions you want to execute in each work unit.	Yes
Maximum Batch Count	Used to specify the maximum number of transactions after which the data must be transferred to the database.	Yes
Thread Pool Name	Used to specify the thread pool on which you want to execute the batch.	No

Note:

You must specify same parameters in the **Service Quantity Calculation (C1-TXNSQ)** and **Mark Completion (C1-TXNCM)** batches. Otherwise, erroneous results might occur.

If you want to perform some post-processing activities on a billable charge, you need to attach a post-processing algorithm on the **TFM - Billable Charge Post-Processing** algorithm entity in the **Algorithms** tab of the **Division** screen. This algorithm is triggered once the billable charge is created and SQIs are updated in the billable charge. Note that the system invokes the algorithm which is attached on the derived account's division and not on the division to which the transaction belongs. A sample post-processing algorithm type named **C1_BCHG_POPC** is shipped with the product. It does not have any business logic. If you want to undertake some post-processing activities on a billable charge, you need to create custom algorithm type and attach the respective algorithm on the **Feed Management Billable Charge Post-Processing** algorithm spot of the respective division. You can refer to the **C1_BCHG_POPC** algorithm type to understand the input parameters that must be passed to the custom algorithm type.

Related Topics

For more information on...	**See...**
Transaction Leg Status Transition	Transaction Leg Status Transition on page 1185

Clean Up

There might be situations when a transaction is mapped to one or more price items and due to some reasons a billable charge could not be created for one of the price item. And, therefore the status of the transaction is changed to **Error**

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(EROR). In such case, you need to either recalculate SQIs in the aggregated billable charge or delete the aggregated billable charge depending on whether the aggregated billable charge includes transaction legs in the **Completed (COMP)** status. You can perform this clean up process through a multi-threaded batch named **Clean Up (C1-TXNCU)**.

When the transaction legs in the **Error (EROR)** and **Completed (COMP)** statuses are aggregated together in a billable charge, the **Clean Up (C1-TXNCU)** batch does the following:

Billable charge contain transaction legs with the following set of pricing attributes...	**Then....**
Ignore Transaction is set to **No**, **Aggregate Transaction** is set to **Yes**, and **Rating Criteria** is set to **Do Not Rate Transactions**	The SQIs are recalculated in the billable charge.
Ignore Transaction is set to **No**, **Aggregate Transaction** is set to **Yes**, and **Rating Criteria** is set to **Aggregate transactions and then rate aggregated SQs (AGTR)**	The SQIs are recalculated in the billable charge and the rate is determined for aggregated service quantities. Once the rate is determined, pass through charges are calculated and accumulated accordingly.
Ignore Transaction is set to **No**, **Aggregate Transaction** is set to **Yes**, and **Rating Criteria** is set to **Rate individual transactions and aggregate calc lines across transactions (RITA)**	The pass through charges are recalculated and accumulated accordingly.

However, when the transaction legs in the **Error (EROR)** status are only aggregated in a billable charge, the **Clean Up (C1-TXNCU)** batch does the following:

Billable charge contain transaction legs with the following set of pricing attributes...	**Then....**
Ignore Transaction is set to **No**, **Aggregate Transaction** is set to **Yes**, and **Rating Criteria** is set to **Do Not Rate Transactions**	The aggregated billable charge is deleted.
Ignore Transaction is set to **No**, **Aggregate Transaction** is set to **Yes**, and **Rating Criteria** is set to **Aggregate transactions and then rate aggregated SQs (AGTR)**	The aggregated billable charge and the corresponding calculation lines are deleted.
Ignore Transaction is set to **No**, **Aggregate Transaction** is set to **Yes**, and **Rating Criteria** is set to **Rate individual transactions and aggregate calc lines across transactions (RITA)**	The aggregated billable charge is deleted.

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Note:

If the aggregation function is based on the transaction amount or on any other user defined amount and the transaction or user defined currency is different from the pricing currency, the system does currency conversion if the appropriate exchange rate is available in the system. The processing date which is stamped against a transaction leg is used to determine effective exchange rate for the transaction leg.

The SQIs in an aggregated billable charge are recalculated only when the **SQ Recalculation Required** option type in the **C1_FM** feature configuration is set to **Y**. If you set the **SQ Recalculation Required** option type in the **C1_FM** feature configuration to **N**, the SQIs are not recalculated in an aggregated billable charge. We recommend you to recalculate SQIs in an aggregated billable charge when more than one account bears the charges for a transaction.

If you want to perform some post-processing activities on a billable charge, you need to attach a post-processing algorithm on the **TFM - Billable Charge Post-Processing** algorithm entity in the **Algorithms** tab of the **Division** screen. This algorithm is triggered once the billable charge is created and SQIs are updated in the billable charge. Note that the system invokes the algorithm which is attached on the derived account's division and not on the division to which the transaction belongs. A sample post-processing algorithm type named **C1_BCHG_POPC** is shipped with the product. It does not have any business logic. If you want to undertake some post-processing activities on a billable charge, you need to create custom algorithm type and attach the respective algorithm on the **TFM - Billable Charge Post-Processing** algorithm spot of the respective division. You can refer to the **C1_BCHG_POPC** algorithm type to understand the input parameters that must be passed to the custom algorithm type.

Besides the transaction aggregation process, the **Clean Up (C1-TXNCU)** batch is also used during the following sub-processes:

- **Cancellation** - During the cancellation process, it deletes non-aggregated billable charges and recalculates SQIs in aggregated billable charges.
- **Disaggregation** - During the disaggregation process, it deletes an aggregated billable charge when all the corresponding transaction legs which were aggregated in the billable charge are deleted during disaggregation.

You can specify either of the following parameters while executing the **Clean Up (C1-TXNCU)** batch:

Parameter Name	Description	Mandatory (Yes or No)
Transaction Header ID	Used when you want to update or delete billable charges created for transactions which are received in a particular transaction feed. **Note:** This parameter should not be used during the disaggregation process.	Yes (Conditional) **Note:** This parameter is required when you set the request type to **CNCL**.
Transaction Source	Used when you want to update or delete billable charges created for transactions which are received from a particular transaction source. **Note:** This parameter should not be used during the cancellation and disaggregation processes.	No
Division	Used when you want to update or delete billable charges created for transactions belonging to a particular division. **Note:** This parameter should not be used during the cancellation process.	No
Account ID	Used when you want to update or delete billable charges created for transactions of a particular account.	No

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Parameter Name	Description	Mandatory (Yes or No)
	Note: This parameter should be used only during the disaggregation process.	
Bill Cycle	Used when you want to update or delete billable charges created for transactions of accounts having a particular bill cycle. **Note:** This parameter should be used only during the disaggregation process.	No
Disaggregate Transactions From Date	Used when you want to update or delete billable charges created for transactions which were performed from a particular date onwards. **Note:** You must specify the date in the YYYY-MM-DD format. This parameter should be used only during the disaggregation process.	Yes (Conditional) **Note:** This parameter is required when you set the request type to **DISAGG**.
Request Type	Used to indicate the process during which you want to execute the batch. The valid values are: • CNCL • EROR • DISAGG	Yes
Chunk Size	Used to specify the number of transactions you want to execute in each work unit.	Yes
Maximum Batch Count	Used to specify the maximum number of transactions after which the data must be transferred to the database.	Yes
Thread Pool Name	Used to specify the thread pool on which you want to execute the batch.	No

Related Topics

For more information on...	See...
Transaction Leg Status Transition	Transaction Leg Status Transition on page 1185
How to set the **C1_FM** feature configuration	Setting the C1_FM Feature Configuration on page 4451

Transaction Aggregation Batch Processing

During the transaction aggregation process, you need to execute the following batches in the specified order:

1. Flush All Caches (F1-FLUSH)
2. Refresh Pricing (C1-TXNRP)
3. Header Validation (C1-TXNHV)
4. Validate Transaction and Derive Price Item (C1-TXNIP)
5. Price Item Pricing Verification (C1-TXNVP)

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6. Update Status (C1-TXNEX)
7. Service Quantity Calculation (C1-TXNSQ)
8. Mark Completion (C1-TXNCM)
9. Clean Up (C1-TXNCU) with the **Request Type** parameter set to **EROR**

The **Validate Transaction and Derive Price Item (C1-TXNIP)** batch locks the **CI_TXN_DTL_PRITM_SUMMARY** table before inserting records to ensure that only unique records are inserted in this table. The locking mechanism results in performance issue when there is no or very little aggregation of transactions. Therefore, we recommend you to use an alternative transaction aggregation process when the aggregation ratio is low. You can enable the alternative transaction aggregation process by setting the **Use C1-TXNPS During Transaction Aggregation** option type in the **C1_FM** feature configuration to **true**. In this alternative transaction aggregation process, you need to execute the following batches in the specified order:

1. Flush All Caches (F1-FLUSH)
2. Refresh Pricing (C1-TXNRP)
3. Header Validation (C1-TXNHV)
4. Validate Transaction and Derive Price Item (C1-TXNIP)
5. Populate CI_TXN_DTL_PRITM_SUMMARY Table (C1-TXNPS)
6. Price Item Pricing Verification (C1-TXNVP)
7. Update Status (C1-TXNEX)
8. Service Quantity Calculation (C1-TXNSQ)
9. Mark Completion (C1-TXNCM)
10. Clean Up (C1-TXNCU) with the **Request Type** parameter set to **EROR**

The following figure graphically explains the sequence in which you need to execute the batches during the transaction aggregation process:

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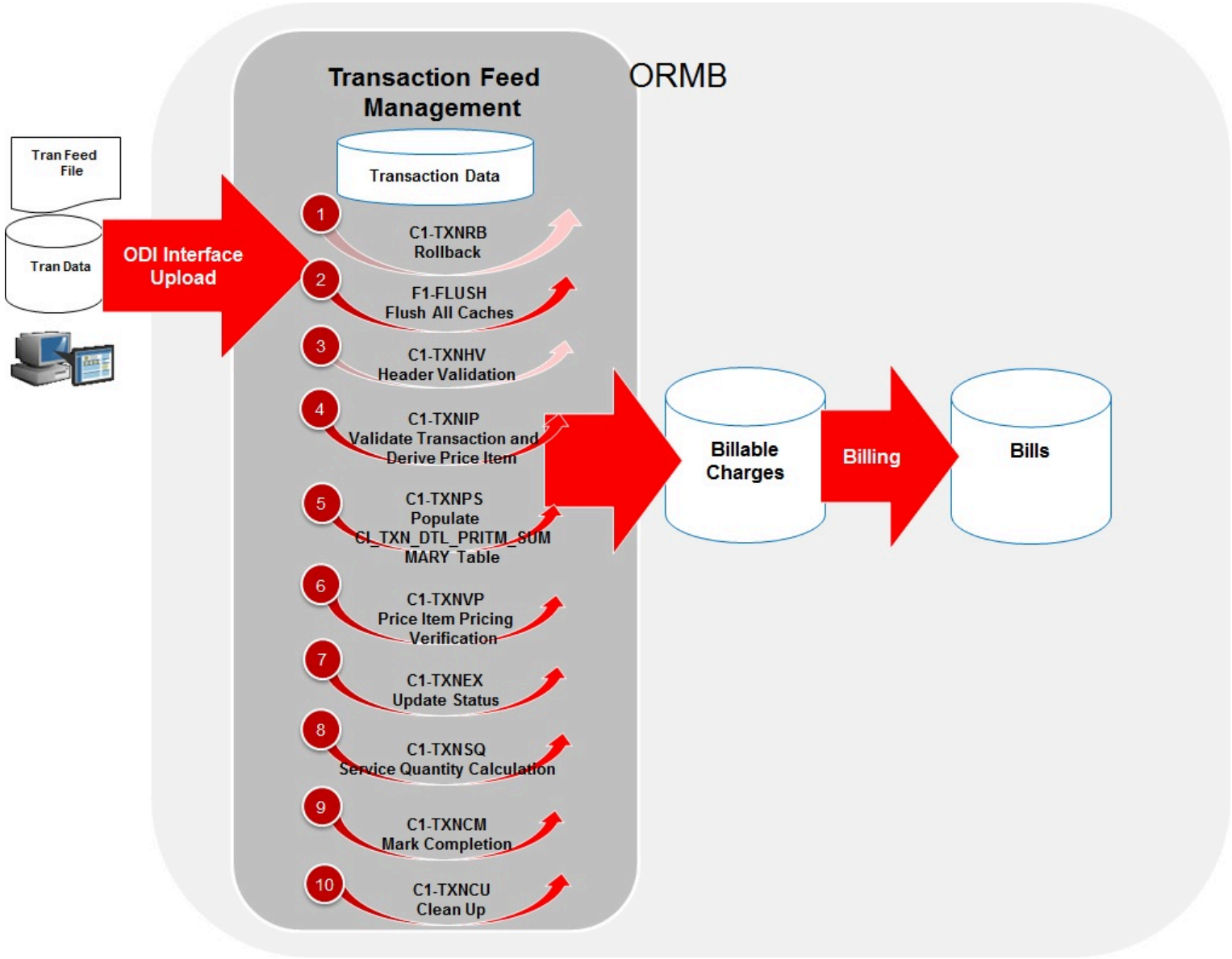

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Note:

You need to remember the following points during the transaction aggregation process:

- Before you start the transaction aggregation process, you need to execute the **Flush All Caches (F1-FLUSH)** batch to clean the cache. This batch has one parameter named **Thread Pool** which allows you to clean cache of a particular thread pool. In case you want to reprocess the error transactions from the earlier cycle, you need to execute the **Rollback (C1-TXNRB)** batch.
- You can store the price item pricing information, and thereby improve the **Price Item Pricing Verification (C1-TXNVP)** batch performance. If you set the **Use Materialized Views** option type of the **C1_FM** feature configuration to **true**, the system will store the price item pricing information in the following tables:
  - CI_PRC_AGRD
  - CI_PRC_PL
  - CI_PRC_INH_PL

  But, if you set the **Use Materialized Views** option type of the **C1_FM** feature configuration to **false**, the system will not store the price item pricing information in the above mentioned tables. If there are any pricing changes, you can update the price item pricing information in these tables by executing the **Refresh Pricing (C1-TXNRP)** batch.
- The **Header Validation (C1-TXNHV)** batch is optional. You can directly execute the **Validate Transaction and Derive Price Item (C1-TXNIP)** batch once the transactions are uploaded in the system.
- The system allows you to execute each batch consecutively. You can execute the **Validate Transaction and Derive Price Item (C1-TXNIP)** batch consecutively with the same division and same parameters, or with the different division and different parameters. But, you cannot execute the **Validate Transaction and Derive Price Item (C1-TXNIP)** batch consecutively with the same division and different parameters. For example, once you execute this batch with division as D1 and transaction source as S1, you cannot execute this batch again with division as D1 and transaction source as S2 until the former transaction aggregation cycle is complete.
- Once the **Price Item Pricing Verification (C1-TXNVP)** batch is executed, you cannot execute the **Validate Transaction and Derive Price Item (C1-TXNIP)** batch again with the same division and same parameters unless and until the transaction aggregation cycle is complete. Similarly, once the **Service Quantity Calculation (C1-TXNSQ)** batch is executed, you cannot execute the **Price Item Pricing Verification (C1-TXNVP)** batch again with the same division and same parameters unless and until the transaction aggregation cycle is complete. This rule is applicable to all subsequent batches in the transaction aggregation cycle.
- During the transaction aggregation process, you must specify the same division and same parameters across each batch. Otherwise, erroneous results might occur.
- If you have already executed the **Validate Transaction and Derive Price Item (C1-TXNIP)** batch without any division, then you cannot execute this batch once again with a division unless and until the transaction aggregation cycle is complete.

Transaction Disaggregation

As the aggregation cycle is different from the billing cycle, there might be situations when due to pricing changes, the billable charges are no longer valid. In such cases, you need to disaggregate the transactions. In the following scenarios, the system automatically creates a disaggregation request in the CI_TXN_DISAGG_REQ table:

If...	**Then**
A price item is assigned to an account	A disaggregation request is created for the account.
The following values in the price item pricing assigned to an account is changed: • Effective Start Date • Effective End Date • Aggregation Schedule	A disaggregation request is created for the account.

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If...	Then
• Ignore Transaction • Aggregate Transaction • Rating Criteria • Price Item Parameter	
A price item is assigned to a person	A disaggregation request is created for each account of the person and its child person.
The following values in the price item pricing assigned to a person is changed: • Effective Start Date • Effective End Date • Aggregation Schedule • Ignore Transaction • Aggregate Transaction • Rating Criteria • Price Item Parameter	A disaggregation request is created for each account of the person and its child person.
A price list is assigned to an account.	A disaggregation request is created for the account.
The following values in the price list assigned to an account is changed: • Effective Start Date • Effective End Date • Priority • Price List Inheritance	A disaggregation request is created for the account.
A price list is assigned to a person.	A disaggregation request is created for each account of the person and its child person.
The following values in the price list assigned to a person is changed: • Effective Start Date • Effective End Date • Priority • Price List Inheritance	A disaggregation request is created for each account of the person and its child person.

However, there are various other scenarios for which you have to disaggregate the transactions. But, at the moment, the system does not automatically create a disaggregation request for these scenarios in the CI_TXN_DISAGG_REQ table. You will have to create an appropriate disaggregation request in this table. The system allows you to create a disaggregation request manually through the **Disaggregation Request** screen or through a batch named **Disaggregation Request Creation (C1-DISTG)**.

In the following scenarios, you have to create an appropriate disaggregation request for the account or person, respectively:

- Effective price item pricing assigned to an account is overridden.
- Variance parameter in the price item pricing assigned to an account is changed.
- A price list assignment has expired or a price list is no longer available to an account.
- Effective price item pricing assigned to a person is overridden.
- Variance parameter in the price item pricing assigned to a person is changed.
- A price list assignment has expired or a price list is no longer available to a person.
- A price item is added to a price list.

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- The following details in the price item pricing assigned to a price list is changed:
  - Variance Parameter
  - Effective Start Date
  - Effective End Date
  - Aggregation Schedule
  - Ignore Transaction
  - Rating Criteria
  - Aggregate Transaction
- A new bundle is created.
- A price item is added to a bundle.
- A price item is removed from a bundle.
- A bundle is eliminated (that is, all its price item are removed).
- A price item is added.
- A price list hierarchy is changed.
- SQIs associated with a price item - division combination are changed.
- Transaction aggregation rule defined for an SQI is changed or deleted.
- Business rules used for initial price item mapping are changed.

At present, the system disaggregates transactions at the account level and not at the price item level. Let us understand this with the help of an example. The following table lists the accounts and price items to which T1 is mapped:

Transaction	**Account**	**Price Item**
T1	A1	P1
T1	A1	P2
T1	A2	P1
T1	A2	P2

Now, if the pricing of P1 assigned to A1 changes, the system creates a disaggregation request for A1 and identifies all transaction legs which are mapped to A1 for disaggregation. In this example, the system will consider the first two transaction legs - T1-A1-P1 and T1-A1-P2 - for disaggregation even if the pricing of P2 assigned to A1 has not changed.

The **Disaggregation Request Creation (C1-DISTG)** batch creates a disaggregation request for an account. When you create a disaggregation request for an account, the transactions mapped to the account are disaggregated. This batch is a multi-threaded batch. The multi-threading is based on account ID and chunks for multi-threading are created based on numerical distribution of account ID. You can specify either of the following parameters while executing this batch:

Parameter Name	**Description**	**Mandatory (Yes or No)**
Division	Used when you want to create disaggregation request for accounts belonging to a particular division.	No
Person ID	Used when you want to create disaggregation request for accounts belonging to a particular person.	No
Bill Cycle	Used when you want to create disaggregation request for accounts having a particular bill cycle.	No
Disaggregate Transactions From Date	Used when you want to create disaggregation request for accounts for which transactions were performed from a particular date onwards. **Note:** You must specify the date in the YYYY-MM-DD format.	Yes

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Parameter Name	Description	Mandatory (Yes or No)
Thread Pool Name	Used to specify the thread pool on which you want to execute the batch.	No

Before you proceed with the disaggregation process, you need to ensure that there are no pending bills for the accounts whose transactions need to be disaggregated. If there are pending bills for these accounts, you need to first execute the **Pending Bill Segments Deletion (C1-BSEGD)** batch and then execute the **Pending Bill Deletion (C1-PNBD)** batch. While executing these batches in the specified order, ensure that you specify the same parameters in both these batches. For more information about these batches, see *Oracle Revenue Management and Billing Batch Execution Guide*.

Note: The **Pending Bill Deletion (C1-PNBD)** batch deletes those pending bills which are generated through the billing batches (i.e. **BILLING** or **C1-PNDBL**). It does not delete pending bills which are generated through the user interface. Also, it deletes regular pending bills and not adhoc pending bills.

Once a disaggregation request is either manually or automatically created for an account, you need to execute the following batches in the specified order to disaggregate transactions:

- **Identify Transactions for Disaggregation (C1-IDENT)** - This batch fetches disaggregation requests which are created for accounts from the CI_TXN_DISAGG_REQ table. It identifies the transactions and the corresponding aggregated and non-aggregated billable charges for disaggregation. If the bill segment of a billable charge is in the **Pending Cancel** or **Frozen** status, the system will not identify the billable charge for deletion. You can specify either of the following parameters while executing this batch:

Parameter Name	Description	Mandatory (Yes or No)
Division	Used when you want to identify the transactions of accounts belonging to a particular division for disaggregation.	No
Account ID	Used when you want to identify the transactions of a particular account for disaggregation.	No
Bill Cycle	Used when you want to identify the transactions of accounts having a particular bill cycle for disaggregation.	No
Disaggregate Transactions From Date	Used when you want to identify the transactions which were performed from a particular date onwards for disaggregation. **Note:** You must specify the date in the YYYY-MM-DD format. The aggregated billable charge, which is affected, should not contain a transaction leg whose transaction date is earlier than the date specified in this parameter. Otherwise, erroneous results will occur. Therefore, ensure that you specify the appropriate value for the **Disaggregate Transactions From Date** parameter.	No
Chunk Size	Used to specify the number of transactions you want to execute in each work unit.	Yes
Maximum Batch Count	Used to specify the maximum number of transactions after which the data must be transferred to the database.	Yes

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Parameter Name	Description	Mandatory (Yes or No)
Post-Processing Algorithm	Used to attach a post-processing algorithm. This algorithm is triggered once the transactions and corresponding billable charges are identified for disaggregation.	No
Exclude Canceled Billable Charges (Y or N)	Used to indicate whether you want to exclude the aggregated and non-aggregated billable charges which are in the **Canceled** status during the disaggregation process. The valid values are: • Y • N **Note:** If you do not specify any value, by default, the parameter value is set to **N**.	No
Thread Pool Name	Used to specify the thread pool on which you want to execute the batch.	No

- **Process Non-Aggregated Transactions (C1-PDTXN)** - This batch processes the identified transactions, deletes the required transaction legs, and changes the status of the transaction to **Uploaded (UPLD)**. If a non-aggregated billable charge exists for a transaction leg and the corresponding bill segment is in the **Cancel** status, then:
  - The billable charge is cancelled.
  - The corresponding transaction leg and calculation lines (if any) are deleted.
  - The status of the transaction is changed to **Uploaded (UPLD)**.

  However, if a non-aggregated billable charge exists for a transaction leg, but if the bill segment is not yet generated, then the billable charge, the corresponding calculation lines (if any), and transaction leg are deleted, and the status of the transaction is changed to **Uploaded (UPLD)**. If a non-aggregated billable charge is in the **Cancel** status, then the corresponding transaction leg and calculation lines (if any) are deleted and the status of the transaction is changed to **Uploaded (UPLD)**. If the rate is determined for a transaction leg which is in the **Ignored (IGNR)** status, the calculation lines are deleted along with the transaction leg during disaggregation.

  If aggregated billable charge exists for a transaction leg, then the corresponding transaction legs and calculation lines (if any) are deleted and the status of the transaction is changed to **Uploaded (UPLD)**. You can specify either of the following parameters while executing this batch:

Parameter Name	Description	Mandatory (Yes or No)
Division	Used when you want to disaggregate the transactions of accounts belonging to a particular division.	No
Account ID	Used when you want to disaggregate the transactions of a particular account.	No
Bill Cycle	Used when you want to disaggregate the transactions of accounts having a particular bill cycle.	No
Disaggregate Transactions From Date	Used when you want to disaggregate the transactions which were performed from a particular date onwards. **Note:** You must specify the date in the YYYY-MM-DD format.	Yes
Chunk Size	Used to specify the number of transactions you want to execute in each work unit.	Yes

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Parameter Name	Description	Mandatory (Yes or No)
Maximum Batch Count	Used to specify the maximum number of transactions after which the data must be transferred to the database.	Yes
Thread Pool Name	Used to specify the thread pool on which you want to execute the batch.	No

Note:

If you want to undertake some preprocessing activities (such as cleaning data in any custom tables) during the disaggregation process, you need to attach a preprocessing algorithm on the **TFM - Disaggregation Pre-Processing** algorithm entity in the **Algorithms** tab of the **Division** screen. This algorithm is triggered when you execute the **Process Non-Aggregated Transactions (C1-PDTXN)** batch. Note that the system invokes the algorithm which is attached on the derived account's division and not on the division to which the transaction belongs.

A sample preprocessing algorithm type named **C1_DSAG_PRPC** is shipped with the product. It does not have any business logic. If you want to undertake some preprocessing activities during the disaggregation process, you need to create custom algorithm type and attach the respective algorithm on the **TFM - Disaggregation Pre-Processing** algorithm spot of the respective division. You can refer to the **C1_DSAG_PRPC** algorithm type to understand the input parameters that must be passed to the custom algorithm type.

- **Clean Up (C1-TXNCU)** - This batch deletes an aggregated billable charge when all the corresponding transaction legs which were aggregated in the billable charge are deleted during disaggregation. If an aggregated billable charge exists for a transaction leg and the corresponding bill segment is in the **Cancel** status, then:
  - The billable charge is cancelled.
  - The status of the transaction is changed to **Uploaded (UPLD)**.

  However, if an aggregated billable charge exists for a transaction leg, but if the bill segment is not yet generated, then the billable charge, and the corresponding calculation lines (if any) are deleted, and the status of the transaction is changed to **Uploaded (UPLD)**. If an aggregated billable charge is in the **Cancel** status, then the corresponding calculation lines (if any) are deleted and the status of the transaction is changed to **Uploaded (UPLD)**.

  While executing the **Clean Up (C1-TXNCU)** batch during disaggregation, you must set the **Request Type** parameter to **DISAGG**. For more information about the parameters that you can specify while executing this batch, refer to Clean Up on page 1160.
- **Update Disaggregation Request Status (C1-DRSUA)** - This batch changes the status of the disaggregation request in the CI_TXN_DISAGG_REQ table to **COMPLETE**. You can specify either of the following parameters while executing this batch:

Parameter Name	Description	Mandatory (Yes or No)
Account ID	Used when you want to update the disaggregation requests' status of a particular account.	No
Division	Used when you want to update the disaggregation requests' status of accounts belonging to a particular division.	No
Bill Cycle	Used when you want to update the disaggregation requests' status of accounts having a particular bill cycle.	No
Disaggregate Transactions From Date	Used when you want to update the disaggregation requests' status of accounts whose transactions were performed from a particular date onwards and the bill segments created for these transactions are in the **Pending Cancel** or **Frozen** status. **Note:** You must specify the date in the YYYY-MM-DD format.	Yes

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Parameter Name	Description	Mandatory (Yes or No)
Chunk Size	Used to specify the number of transactions you want to execute in each work unit.	Yes
Update Status Algorithm	Used to attach a custom algorithm which indicates when the status of the disaggregation request in the CI_TXN_DISAGG_REQ table must be changed to **COMPLETE**. **Note:** If an algorithm is specified in this parameter, the system uses the custom logic and not the in-built logic for updating the status of the disaggregation requests.	No
Exclude Canceled Billable Charges (Y or N)	Used to indicate whether you want to change the status of the disaggregation request to **COMPLETE** when the canceled billable charges are excluded during the disaggregation process. The valid values are: • Y • N **Note:** If you do not specify any value, by default, the parameter value is set to **N**. You must specify the same value for this parameter while executing the **Identify Transactions for Disaggregation (C1-IDENT)** and **Update Disaggregation Request Status (C1-DRSUA)** batches during the disaggregation process. Otherwise, erroneous results will occur.	No
Thread Pool Name	Used to specify the thread pool on which you want to execute the batch.	No

Related Topics

For more information on...	See...
Transaction Leg Status Transition	Transaction Leg Status Transition on page 1185
How to create a disaggregation request for a person	Creating a Disaggregation Request for a Person on page 1294
How to create a disaggregation request for an account	Creating a Disaggregation Request for an Account on page 1299
How to create a disaggregation request for a price item	Creating a Disaggregation Request for a Price item on page 1304
How to create a disaggregation request for a price assignment	Creating a Disaggregation Request for a Price Assignment on page 1309
How to create a disaggregation request for a billable charge	Creating a Disaggregation Request for a Billable Charge on page 1313
How to create a reseeding request for a parent accumulation group	Creating a Reseeding Request for a Parent Accumulation Group (Specific to Health Insurance Domain) on page 1316

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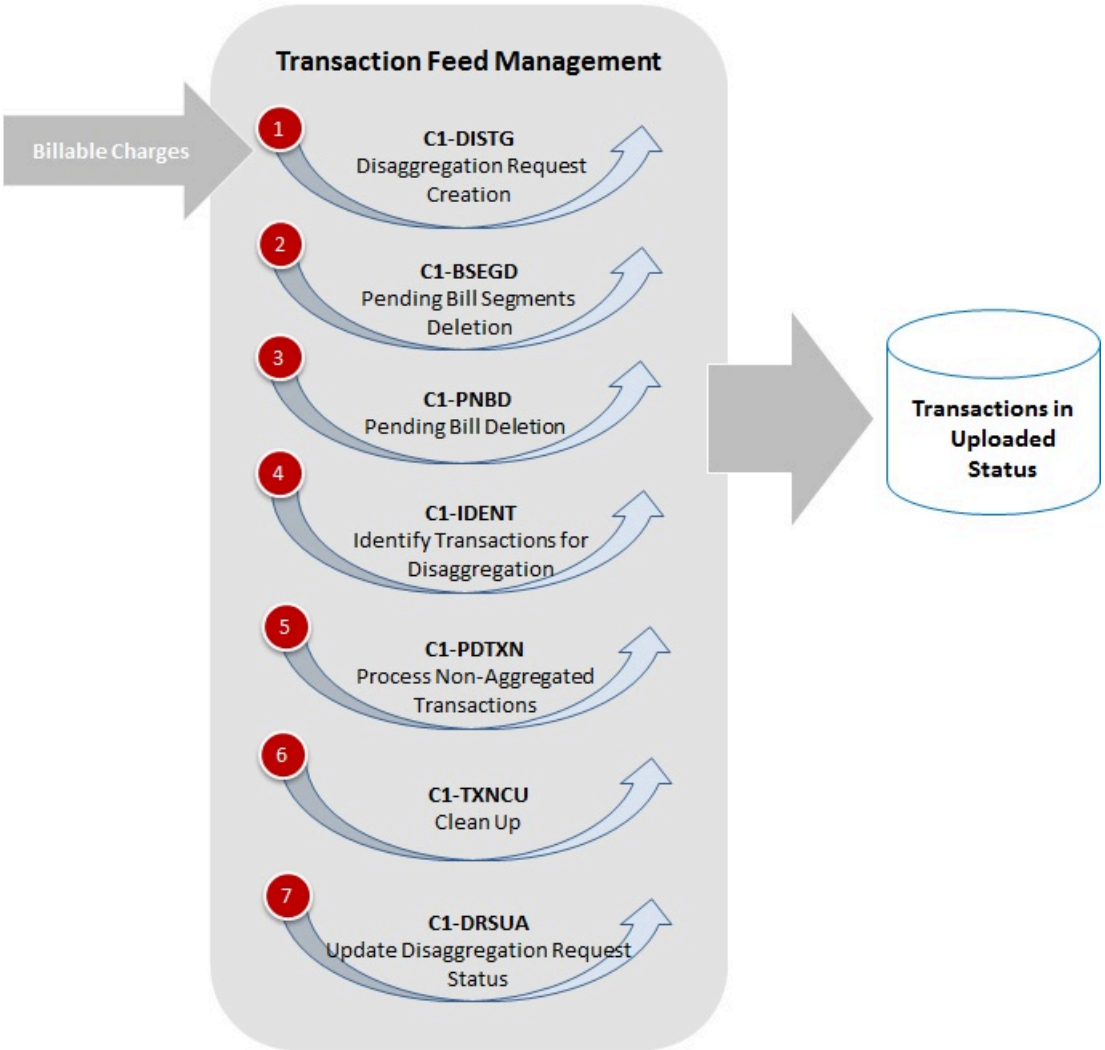
Transaction Disaggregation Batch Processing

During the transaction disaggregation process, you need to execute the following batches in the specified order:

1. Disaggregation Request Creation (C1-DISTG)
2. Pending Bill Segments Deletion (C1-BSEGD)
3. Pending Bill Deletion (C1-PNBD)
4. Identify Transactions for Disaggregation (C1-IDENT)
5. Process Non-Aggregated Transactions (C1-PDTXN)
6. Clean Up (C1-TXNCU) with the **Request Type** parameter set to **DISAGG**
7. Update Disaggregation Request Status (C1-DRSUA)

The following figure graphically explains the sequence in which you need to execute the batches during the transaction disaggregation process:



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Reseeding (Specific to Health Insurance Domain)

In the self-funded health insurance business, there might be situations when you may want to disaggregate the claim, enrollment, and ancillary transactions. The system enables you to disaggregate the claim, enrollment, and ancillary transactions until these transactions are not billed to the customer. If a transaction is billed to the customer, you cannot disaggregate the transaction using the normal transaction disaggregation process.

In the following scenarios, you may want to disaggregate the claim or ancillary transactions once these are billed to the customer:

- The changes are made to the specific stop-loss (SSL), aggregate stop-loss (ASL), discount arrangement, or level funded pricing rule which is used during the transaction aggregation process.
- A new pricing rule is created using a specific stop-loss (SSL) or aggregate stop-loss (ASL) pricing rule type which is added in the claim or ancillary pricing rule type using which the claim or ancillary transaction is processed.
- A new pricing rule is created using a discount arrangement pricing rule type which is added in the claim or ancillary pricing rule type using which the claim or ancillary transaction is processed.
- A new pricing rule is created using a level funded pricing rule type which is added in the claim or ancillary pricing rule type using which the claim or ancillary transaction is processed.
- A specific stop-loss, aggregate stop-loss, discount arrangement, or level funded pricing rule type is added as related pricing rule type in the claim or ancillary pricing rule type using which the claim or ancillary transaction is processed.

The former scenario arises due to change in pricing rule, whereas the latter four scenarios arise due to the late setup. In such scenarios, you can create the **Accumulation Group Based Disaggregation Request** (also known as **Reseeding Request**) to disaggregate the claim and ancillary transactions. In the **Accumulation Group Based Disaggregation** (also known as **Reseeding**) feature, the system allows you to create the reseeding requests for the accounts using a parent accumulation group. At present, you can create the reseeding requests for the accounts only from the user interface and not through the **Disaggregation Request Creation (C1-DISTG)** batch.

While creating a reseeding request using the **Parent Accumulation Group** request type, you can specify the accumulation type (i.e. whether it is stop-loss or discount arrangement). If the accumulation type is set to **Stop Loss**, the system provides the **Disaggregate All Account** option. If you select the **Disaggregate All Account** option, the system considers accounts of all bill groups of the parent customer (for whom the parent accumulation group is created) and then creates a reseeding request for each such account. However, if you do not select the **Disaggregate All Account** option, the system considers accounts of only those bill groups where the parent accumulation group is used for creating the specific stop-loss and aggregate stop-loss pricing rules and then creates a reseeding request for each such account. In addition, the system creates a reseeding request for the ASSL and ASL Credit accounts which are specified in the specific stop-loss and aggregate stop-loss pricing rules, respectively. Note that the reseeding requests are created for the ASSL and ASL Credit accounts irrespective of whether the **Disaggregate All Account** option is selected or not.

However, if the accumulation type is set to **Discount Arrangement**, the system does not provide the **Disaggregate All Account** option. In this case, the system, by default, considers accounts of all bill groups of the parent customer (for whom the parent accumulation group is created) and then creates a reseeding request for each such account.

Note: In the late setup scenarios, you need to ensure that the pricing rules are created before you create the reseeding requests for accounts.

In the **Reseeding** process, you need to execute the following batches in the specified sequence:

1. **Identify Transactions for Disaggregation (C1-IDENT)** - It fetches the reseeding requests for accounts and then identifies the claim or ancillary transactions for disaggregation. If the reseeding request is created due to change in a pricing rule, the **BILLABLE_CHG_ACT_CD** column corresponding to the specific stop-loss, aggregate stop-loss, discount, or level-funded billable charges in the **CI_DISAGG_BCHG_DETAIL** table is set to **Billable Charge is Part of Frozen Bill Segment (40)**. It indicates that no action must be taken on these billable charges. And, if the reseeding request is created due to the late setup scenarios, the claim or ancillary transaction and its legs are moved to the **CI_TXN_DETAIL_STG** and **CI_TXN_DTL_PRITM_STG** tables, respectively. In addition, the status of the

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claim or ancillary transaction is changed to **Uploaded**. For more information about the parameters, refer to *ORMB - Transaction Feed Management - Batch Execution Guide*.

2. **Process Non-Aggregated Transactions (C1-PDTXN)** - If the reseeding request is created due to change in a pricing rule, it does the following:

   - The specific stop-loss, aggregate stop-loss, discount arrangement, and stop-loss and discount specific level funded transaction legs, whose corresponding bill segments are in the **Frozen** or **Pending Cancel** status, are forcibly deleted from the **CI_TXN_DTL_PRITM** table.
   - The specific stop-loss, aggregate stop-loss, discount arrangement, and stop-loss and discount specific level funded transaction legs, whose corresponding bill segments are in a status other than **Frozen** or **Pending Cancel**, are moved to the **CI_TXN_DTL_PRITM_STG** table. And, the claim or ancillary transaction is moved to the **CI_TXN_DETAIL_STG** table and its status is changed to **Uploaded**.

   Irrespective of whether the reseeding request is created due to change in a pricing rule or the late setup scenarios, this batch does not perform any actions on the claim, claim based fee, and ancillary transaction legs and their billable charges. For more information about the parameters, refer to *ORMB - Transaction Feed Management - Batch Execution Guide*.
3. **Transaction Cleanup Batch (C1-TXNCU)** - While executing the **Clean Up (C1-TXNCU)** batch during reseeding, you must set the **Request Type** parameter to **DISAGG**. For more information about the parameters, refer to *ORMB - Transaction Feed Management - Batch Execution Guide*.
4. **Update Disaggregation Request Status (C1-DRSUA)** - Once the claim or ancillary transaction is successfully disaggregated, the status of the reseeding request is changed to **COMPLETE**. For more information about the parameters, refer to *ORMB - Transaction Feed Management - Batch Execution Guide*.

When you re-aggregate the claim or ancillary transactions which were disaggregated due to late setup, the system creates the specific stop-loss, aggregate stop-loss, discount arrangement, and stop-loss and discount specific level funded transaction legs and their billable charges. However, when you re-aggregate the claim or ancillary transactions which were disaggregated due to change in a pricing rule, the system creates the specific stop-loss, aggregate stop-loss, discount arrangement, and stop-loss and discount specific level funded transaction legs and the billable charges for the delta amount (which resulted due to change in pricing).

If the accumulation type is set to **Stop Loss**, the system deletes the specific stop-loss transaction legs. In addition, it deletes the aggregate stop-loss transaction legs (if any), discount arrangement transaction legs (if any), and level funded transaction legs (if any) whose calculation is based on the specific stop-loss transaction legs.

However, if the accumulation type is set to **Discount Arrangement**, the system deletes the discount arrangement transaction legs. It deletes the specific stop-loss transaction legs (if any), aggregate stop-loss transaction legs (if any), and level funded transaction legs (if any) when the discount arrangement pricing rule is used in the specific stop-loss pricing rule. However, it deletes the aggregate stop-loss transaction legs (if any) and level funded transaction legs (if any) when the discount arrangement pricing rule is used in the aggregate stop-loss pricing rule.

For example, the CLAIM pricing rule type contains the SSL, ASL, DISCOUNT, and LEVEL FUNDED pricing rule types as the related pricing rule types, and the SSL and ASL pricing rules contain the following discount arrangement pricing rules:

Discount Arrangement Pricing Rule	**Included in the SSL Pricing Rule (Yes or No)**	**Included in the ASL Pricing Rule (Yes or No)**
DISCOUNT1	Yes	No
DISCOUNT2	No	Yes

Now, if the reseeding request (where the accumulation type is set to **Stop Loss**) is created for an account due to change in the SSL pricing rule, the system behaves in the following manner for the C1 claim transaction:

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Transaction Leg	Existing Transaction Leg Deleted (Yes or No)	New Transaction Leg Created (Yes or No)	Existing Billable Charge Deleted (Yes or No)	New Billable Charge Created for Delta Charges (Yes or No)
Claim	No	No	No	No
SSL	Yes	Yes	No	Yes
ASL	Yes	Yes	No	Yes
DISCOUNT	No	No	No	No
LEVEL FUNDED	Yes	Yes	No	Yes
DISCOUNT1	Yes	Yes	No	Yes
DISCOUNT2	Yes	Yes	No	Yes

However, if the reseeding request (where the accumulation type is set to **Discount Arrangement**) is created for an account due to change in the DISCOUNT2 pricing rule, the system behaves in the following manner for the C1 claim transaction:

Transaction Leg	Existing Transaction Leg Deleted (Yes or No)	New Transaction Leg Created (Yes or No)	Existing Billable Charge Deleted (Yes or No)	New Billable Charge Created for Delta Charges (Yes or No)
Claim	No	No	No	No
SSL	No	No	No	No
ASL	Yes	Yes	No	Yes
DISCOUNT	No	No	No	No
LEVEL FUNDED	Yes	Yes	No	Yes
DISCOUNT1	No	No	No	No
DISCOUNT2	Yes	Yes	No	Yes

Let us take another example where the related pricing rule types are not specified in the CLM1 pricing rule type. Therefore, the system just created claim-specific transaction legs and billable charges for the C2 claim transaction. These claim billable charges are then billed to the customer. Now, if you add the SSL and ASL pricing rule types as the related pricing rule types in the CLM1 pricing rule type and create a reseeding request (where the accumulation type is set to **Stop Loss**) for an account, the system behaves in the following manner for the C2 claim transaction when the transaction incurred and paid dates fall within the incurred and paid date ranges defined in the parent accumulation group:

Transaction Leg	Existing Transaction Leg Deleted (Yes or No)	New Transaction Leg Created (Yes or No)	Existing Billable Charge Deleted (Yes or No)	New Billable Charge Created for Delta Charges (Yes or No)
Claim	No	No	No	No
SSL	Not applicable	Yes	Not applicable	Yes
ASL	Not applicable	Yes	Not applicable	Yes
DISCOUNT1	Not applicable	Yes	Not applicable	Yes
DISCOUNT2	Not applicable	Yes	Not applicable	Yes

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Transaction Cancellation

There might be situations when incorrect transaction data file is uploaded in the system. In such cases, the system provides you with an ability to cancel the whole transaction feed. You can cancel a transaction feed either before the transaction aggregation process starts (that is, before executing the **Validate Transaction and Derive Price Item (C1-TXNIP)** batch) or after the transaction aggregation process ends (that is, after executing the **Clean Up (C1-TXNCU)** batch). In other words, you cannot cancel a transaction feed during the transaction aggregation process. Once the transaction feed is cancelled, the status of the feed and all transactions in the feed is changed to **Cancelled (CNCL)**.

The following table explains how the system behaves:

When you cancel a transaction feed for which...	Then
A bill (with the **Pending** status) is already generated in the system	The corresponding billable charges, bill segments, and bill are deleted. The corresponding transaction legs and their calculation lines (if any) are deleted, and the status of the transactions is changed to **Cancelled (CNCL)**.

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When you cancel a transaction feed for which...	Then
	Note: If a pending bill has a bill segment in the **Frozen** or **Pending Cancel** status, the system does not allow you to cancel the transaction feed. If a pending bill has a bill segment in the **Cancel** status, the system behaves in the following manner: • Deletes all other bill segments which are not in the **Cancel** status. • The billable charge corresponding to the bill segment which is not in the **Cancel** status is deleted if the billable charge is in the **Billable** status and if the billable charge only includes transactions from the feed that you want to cancel. • The billable charge corresponding to the bill segment which is not in the **Cancel** status is not deleted or recalculated if the billable charge is in the **Cancelled** status. • The billable charge corresponding to the bill segment which is in the **Cancel** status is cancelled if the billable charge only includes transactions from the feed that you want to cancel. • The SQIs in the billable charge are recalculated if the billable charge includes transactions from multiple feeds. If a bill is created for transactions which are uploaded through multiple transaction feeds (for example, Feed A and Feed B and you want to cancel Feed A), then: • The bill and their corresponding bill segments are deleted. • The SQIs are recalculated in the corresponding billable charges. • The legs of transactions uploaded through Feed A and the corresponding calculation lines (if any) are deleted. • The status of the transactions uploaded through Feed A is changed to **Cancelled (CNCL)**. • The status of Feed A is changed to **Cancelled (CNCL)**. • The status of the transactions uploaded through Feed B remains the same (i.e. **Completed (COMP)**).
A bill (with the **Complete** status) already exists in the system	The system does not allow you to cancel the transaction feed.
A bill (with the **Complete** status) has all bill segments in the **Cancelled** status	The corresponding billable charges are cancelled. The corresponding transaction legs and their calculation lines (if any) are deleted, and the status of the transactions is changed to **Cancelled (CNCL)**.
A billable charge (with the **Billable** status) exists in the system	The billable charge is deleted. The corresponding transaction legs and their calculation lines (if any) are deleted, and the status of the transactions is changed to **Cancelled (CNCL)**.

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When you cancel a transaction feed for which...	Then
	Note: In case a billable charge is created for transactions uploaded through multiple transaction feeds (for example, Feed A and Feed B and you want to cancel Feed A), then: • The SQIs are recalculated in the billable charge. • The legs of transactions uploaded through Feed A and the corresponding calculation lines (if any) are deleted. • The status of the transactions uploaded through Feed A is changed to **Cancelled (CNCL)**. • The status of Feed A is changed to **Cancelled (CNCL)**. • The status of the transactions uploaded through Feed B remains the same (i.e. **Completed (COMP)**).
A billable charge (with the **Cancelled** status) exists in the system	The billable charge is not deleted. However, the corresponding transaction legs and their calculation lines (if any) are deleted and the status of the transactions is changed to **Cancelled (CNCL)**.

To cancel a transaction feed, you need to execute the following batches in the specified order:

1. **Pending Bill Deletion (C1-DELBL)** - This batch deletes the bills (with the **Pending** status) and their corresponding bill segments. You can specify either of the following parameters while executing this batch:

Parameter Name	Description	Mandatory (Yes or No)
Transaction Header ID	Used when you want to delete bills which include charges for transactions which are received in a particular transaction feed.	Yes
Chunk Size	Used to specify the number of transactions you want to execute in each work unit.	Yes
Maximum Batch Count	Used to specify the maximum number of transactions after which the data must be transferred to the database.	Yes
Thread Pool Name	Used to specify the thread pool on which you want to execute the batch.	No

2. **Clean Up (C1-TXNCU)** - This batch deletes non-aggregated and aggregated billable charges. An aggregated billable charge is deleted when it includes legs of transactions from the feed that you want to cancel. If an aggregated billable charge includes legs of transactions from multiple feeds, the SQIs and calculation lines (if any) are recalculated in the aggregated billable charge. The corresponding calculation lines are deleted whenever an aggregated billable charge, which includes transaction legs whose rating criteria is set to **Aggregate transactions and then rate aggregated SQs (AGTR)**, is cancelled or deleted during the cancellation process. Note that while executing this batch, the **Request Type** parameter must be set to **CNCL**. For more information about the parameters that you can specify while executing this batch, refer to Clean Up on page 1160.
3. **Cancellation (C1-TXCNC)** - This batch deletes the transaction legs. The corresponding calculation lines are deleted whenever an aggregated billable charge, which includes transaction legs whose rating criteria is set to **Rate individual transactions and aggregate calc lines across transactions (RITA)** or **Rate Transactions (RITX)**, is cancelled or deleted during the cancellation process. Finally, this batch changes the status of the feed and all transactions in the feed to **Cancelled (CNCL)**. You can specify either of the following parameters while executing this batch:

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Parameter Name	Description	Mandatory (Yes or No)
Transaction Header ID	Used when you want to cancel a particular transaction feed.	Yes
Chunk Size	Used to specify the number of transactions you want to execute in each work unit.	Yes
Maximum Batch Count	Used to specify the maximum number of transactions after which the data must be transferred to the database.	Yes
Thread Pool Name	Used to specify the thread pool on which you want to execute the batch.	No

Note:

If you want to undertake some preprocessing activities (such as cleaning data in any custom tables) during the cancellation process, you need to attach a preprocessing algorithm on the **TFM - Cancellation Pre-Processing** algorithm entity in the **Algorithms** tab of the **Division** screen. This algorithm is triggered when you execute the **Cancellation (C1-TXCNC)** batch. Note that the system invokes the algorithm which is attached on the derived account's division and not on the division to which the transaction belongs.

A sample preprocessing algorithm type named **C1_CNCL_PRPC** is shipped with the product. It does not have any business logic. If you want to undertake some preprocessing activities during the cancellation process, you need to create custom algorithm type and attach the respective algorithm on the **TFM - Cancellation Pre-Processing** algorithm spot of the respective division. You can refer to the **C1_CNCL_PRPC** algorithm type to understand the input parameters that must be passed to the custom algorithm type.

Related Topics

For more information on...	See...
Transaction Leg Status Transition	Transaction Leg Status Transition on page 1185

Transaction Cancellation Batch Processing

During the transaction cancellation process, you need to execute the following batches in the specified order:

1. Pending Bill Deletion (C1-DELBL)
2. Clean Up (C1-TXNCU) with the **Request Type** parameter set to **CNCL**
3. Cancellation (C1-TXCNC)

The following figure graphically explains the sequence in which you need to execute the batches during the transaction cancellation process:

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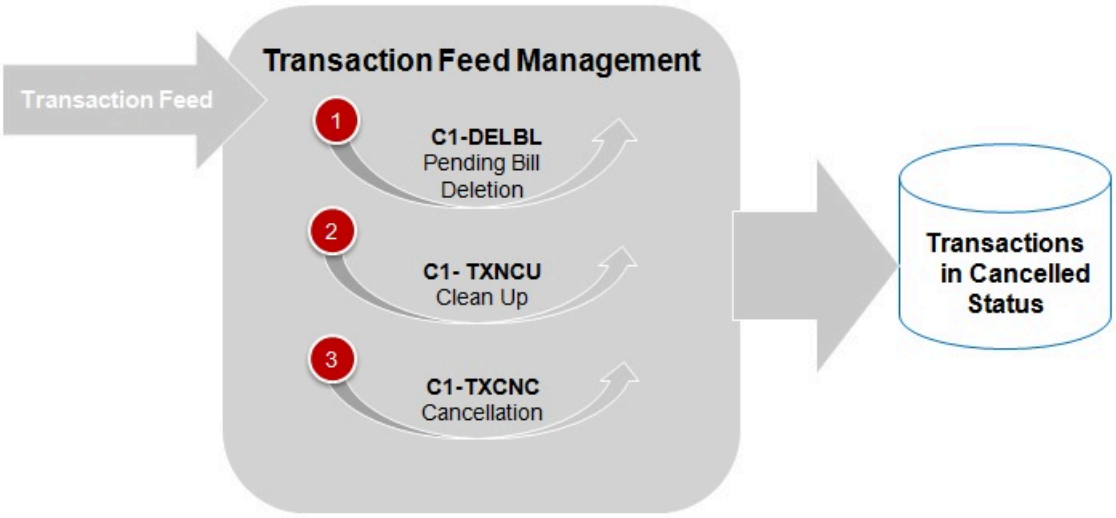

Transaction Rollback

In the transaction aggregation process, an error occurs when:

- Transaction validation fails.
- Transaction does not satisfy any rule invoked through the rule type.
- Effective pricing is not available for one or more price items to which a transaction is mapped.
- SQIs are not defined for the price item - division combination.
- Transaction aggregation rule is not defined for the SQI.
- Exchange rate is not available during currency conversion.
- There is no contract available with the specified contract type on the transaction date or when the contract is inactive.
- There are multiple effective contracts of the same contract type (available on the transaction date) in **Active**, **Pending Stop**, or **Stop** status.
- The **Price Assignment Search** algorithm is not defined for the division.
- The parameter values are either not defined or invalid in the **Price Assignment Search** algorithm on the processing date.
- The period in which the transaction date falls is not defined in the aggregation schedule.
- Price Item parameters specified in the output parameters are not effective for the price item on the processing date.
- Mandatory price item parameter which is effective on the processing date is not specified in the output parameter.
- Parameter value is not specified for all mandatory price item parameters which are effective on the processing date.

In such cases, the status of the transaction is changed to **Error**. You can configure the required setup and then execute the following batches once again in the specified order:

1. Flush All Caches (F1-FLUSH)
2. Refresh Pricing (C1-TXNRP)
3. Header Validation (C1-TXNHV)
4. Validate Transaction and Derive Price Item (C1-TXNIP)
5. Populate CI_TXN_DTL_PRITM_SUMMARY Table (C1-TXNPS)

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

6. Price Item Pricing Verification (C1-TXNVP)
7. Update Status (C1-TXNEX)
8. Service Quantity Calculation (C1-TXNSQ)

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9. Mark Completion (C1-TXNCM)
10. Clean Up (C1-TXNCU)

But, before you execute these batches, you need to rollback the transaction status to **Uploaded (UPLD)**. The system allows you to rollback transactions which are in the **Ignored (IGNR)** and **Error (EROR)** status. When you rollback a transaction, the corresponding transaction legs are deleted and the status of the transaction is changed to **Uploaded (UPLD)**. On rolling back a transaction leg whose effective pricing has the **Ignore Transaction** field set to **Yes** and the **Rating Criteria** field set to **Rate Transactions (RITX)**, the corresponding calculation lines are also deleted along with the transaction leg. If you rollback a partially disaggregated transaction which is in the **Error (EROR)** status, the transaction legs which are in the **Error (EROR)** status are only deleted and the status of the transaction is changed to **Uploaded (UPLD)**.

You need to execute the **Rollback (C1-TXNRB)** batch to rollback transactions which are in the **Ignored (IGNR)** and **Error (EROR)** status. You can specify the following parameters while executing this batch:

Parameter Name	Description	Mandatory (Yes or No)
Transaction Status	Used to indicate whether you want to rollback transactions which are in the **Ignored** or **Error** status. The valid values are: • IGNR • EROR	Yes
Transaction Header ID	Used when you want to rollback transactions which are received in a particular transaction feed.	No
Transaction Source	Used when you want to rollback transactions which are received from a particular transaction source.	No
Division	Used when you want to rollback transactions belonging to a particular division.	No
Rollback From Date	Used when you want to rollback transactions which were performed from a particular date onwards. **Note:** You must specify the date in the YYYY-MM-DD format. The rollback from date cannot be later than the rollback to date.	No
Rollback To Date	Used when you want to rollback transactions which were performed till a particular date. **Note:** You must specify the date in the YYYY-MM-DD format. The rollback to date cannot be earlier than the rollback from date.	No
Chunk Size	Used to specify the number of transactions you want to execute in each work unit.	Yes
Maximum Batch Count	Used to specify the maximum number of transactions after which the data must be transferred to the database.	Yes
Thread Pool Name	Used to specify the thread pool on which you want to execute the batch.	No

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Note:

If you want to undertake some preprocessing activities (such as cleaning data in any custom tables) during the rollback process, you need to attach a preprocessing algorithm on the **Transaction Feed Management Rollback Preprocessing** algorithm entity in the **Algorithms** tab of the **Division** screen. This algorithm is triggered when you execute the **Rollback (C1-TXNRB)** batch. Note that the system invokes the algorithm which is attached on the division to which the transaction belongs.

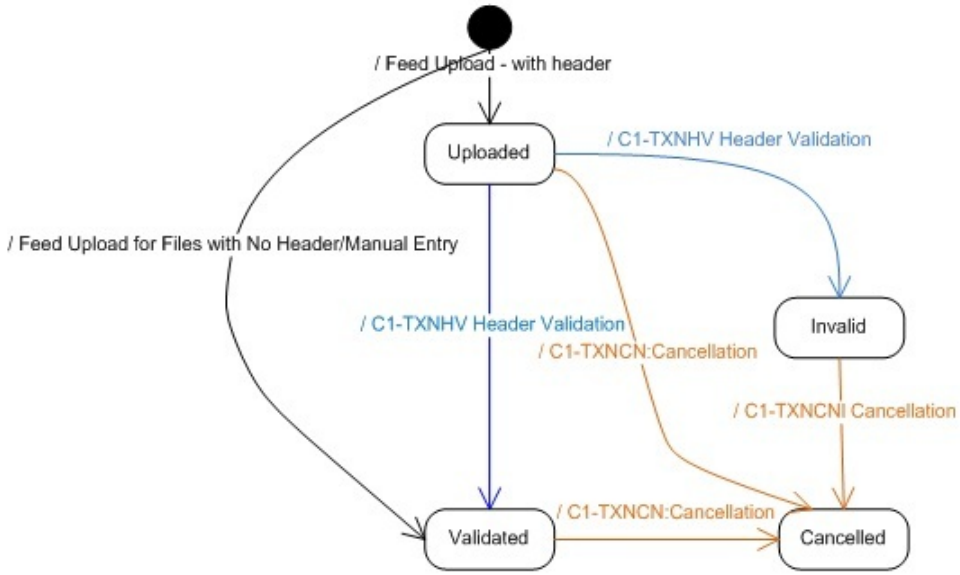
A sample preprocessing algorithm type named **C1_ROBK_PRPC** is shipped with the product. It does not have any business logic. If you want to undertake some preprocessing activities during the rollback process, you need to create custom algorithm type and attach the respective algorithm on the **TFM - Rollback Pre-Processing** algorithm spot of the respective division. You can refer to the **C1_ROBK_PRPC** algorithm type to understand the input parameters that must be passed to the custom algorithm type.

Related Topics

For more information on...	See...
Transaction Leg Status Transition	Transaction Leg Status Transition on page 1185

Feed Status Transition

The following figure graphically indicates how a feed moves from one status to another during the transaction feed management process:



Transaction Status Transition

Aggregation

The following figure graphically indicates how a transaction moves from one status to another during the aggregation process:

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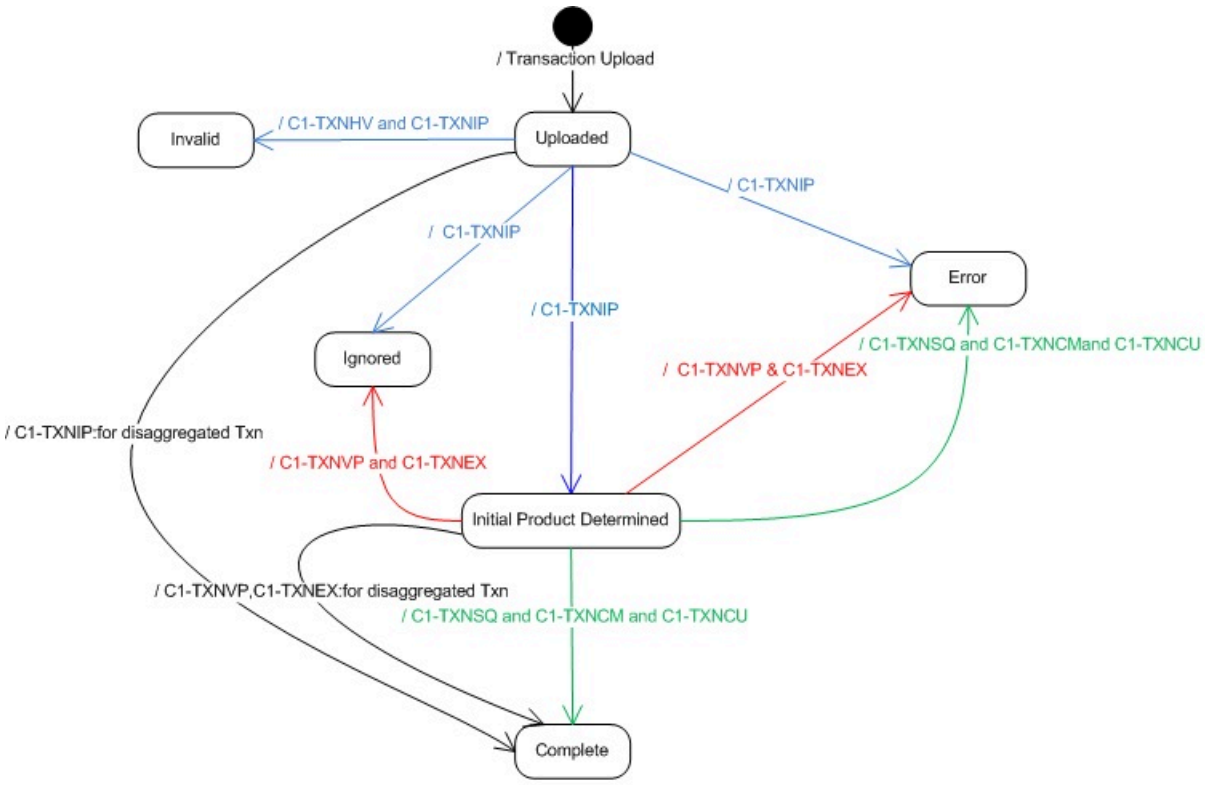

Disaggregation, Rollback, and Cancellation

The following figure graphically indicates how a transaction moves from one status to another during the disaggregation, rollback, and cancellation processes:

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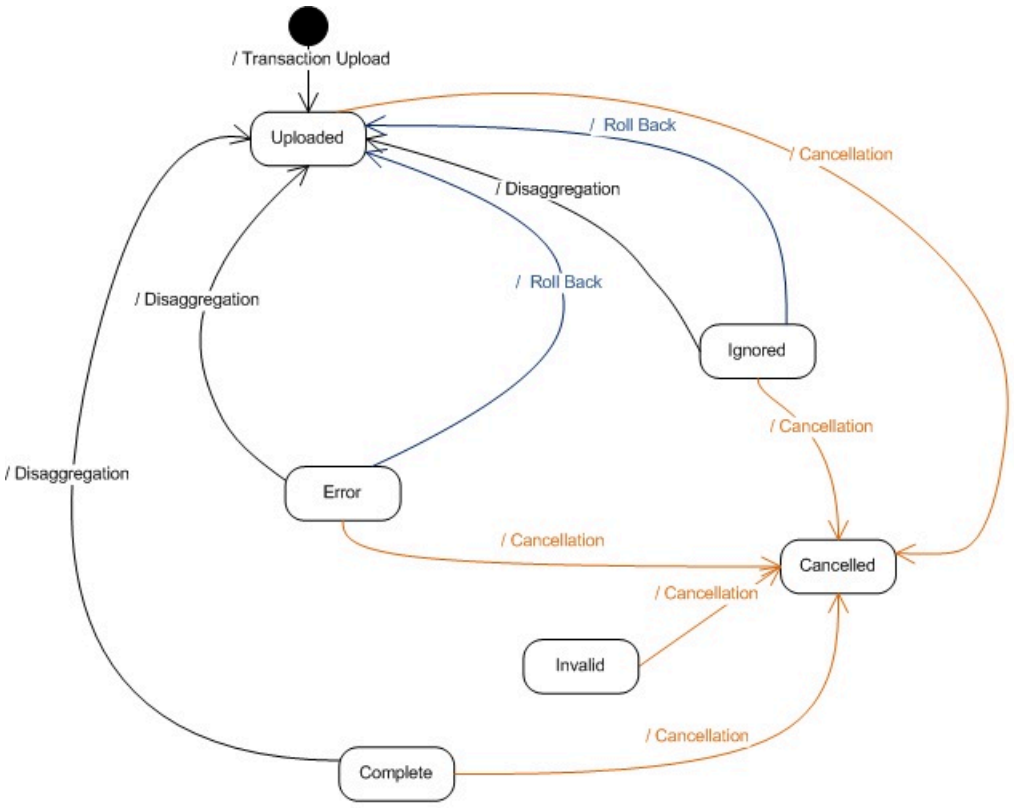

Transaction Leg Status Transition

This section explains how a transaction leg moves from one status to another during the following sub-processes:

- Transaction Aggregation

  Note: This is the aggregation process for transactions that are recently uploaded or reaggregated after being fully disaggregated.

- Transaction Rollback
- Transaction Cancellation
- Transaction Disaggregation
- Transaction Reaggregation

  Note: This is the aggregation process for transactions that are reaggregated after being partially disaggregated.

Transaction Aggregation

The following table indicates how a transaction leg moves from one status to another during the aggregation process:

Sr. No.	Batch	Event	Pre Event Transaction Status	Pre Event Transaction Leg Status	Post Event Transaction Status	Post Event Transaction Leg Status
1	C1-TXNIP	Transaction validation fails	UPLOADED	Not applicable as the transaction legs are not yet created	INVALID	Not applicable as the transaction legs are not yet created

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Sr. No.	Batch	Event	Pre Event Transaction Status	Pre Event Transaction Leg Status	Post Event Transaction Status	Post Event Transaction Leg Status
		due to incomplete transaction data				
2	C1-TXNIP	Transaction validation fails due to invalid or incorrect transaction data	UPLOADED	Not applicable as the transaction legs are not yet created	ERROR	Not applicable as the transaction legs are not yet created
3	C1-TXNIP	Transaction validation is successful but no product is derived	UPLOADED	Not applicable as the transaction legs are not yet created	ERROR	Not applicable as the transaction legs are not yet created
4	C1-TXNIP	Transaction validation is successful and product is derived	UPLOADED	Not applicable as the transaction legs are not yet created	INITIAL PRODUCT DETERMINED	INITIAL PRODUCT DETERMINED
5	C1-TXNIP	Transaction validation is successful and the transaction is ignored by the rule based on the transaction attributes	UPLOADED	Not applicable as the transaction legs are not yet created	IGNORED	Not applicable as the transaction legs are not yet created
6	C1-TXNVP and C1-TXNEX	Effective pricing is not found for any of the transaction legs	INITIAL PRODUCT DETERMINED	INITIAL PRODUCT DETERMINED	ERROR	ERROR
7	C1-TXNVP and C1-TXNEX	**Ignore Transaction** flag is set to **Y** in the effective pricing for one or more transaction legs but not for all transaction legs	INITIAL PRODUCT DETERMINED	INITIAL PRODUCT DETERMINED	INITIAL PRODUCT DETERMINED	IGNORED (when **Ignore Transaction** flag is set to **Y** in the effective pricing) INITIAL PRODUCT DETERMINED (when **Ignore Transaction** flag is set to **N** in the effective pricing)
8	C1-TXNVP and C1-TXNEX	**Ignore Transaction** flag is set to **Y** in the effective pricing for all transaction legs	INITIAL PRODUCT DETERMINED	INITIAL PRODUCT DETERMINED	IGNORED	IGNORED
9	C1-TXNVP	**Ignore Transaction** flag is set to **N** in the effective pricing	INITIAL PRODUCT DETERMINED	INITIAL PRODUCT DETERMINED	INITIAL PRODUCT DETERMINED	INITIAL PRODUCT DETERMINED

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Sr. No.	Batch	Event	Pre Event Transaction Status	Pre Event Transaction Leg Status	Post Event Transaction Status	Post Event Transaction Leg Status
	and C1-TXNEX	for all transaction legs				
10	C1-TXNSQ and C1-TXNCM	SQIs are not defined for the product - division combination, Transaction aggregation rule is not defined for the SQI, or Exchange rate is not available during currency conversion	INITIAL PRODUCT DETERMINED	INITIAL PRODUCT DETERMINED	ERROR	ERROR
11	C1-TXNSQ and C1-TXNCM	Billable charges are created successfully for all transaction legs	INITIAL PRODUCT DETERMINED	INITIAL PRODUCT DETERMINED	COMPLETED	COMPLETED

Transaction Rollback

The following table indicates how a transaction leg moves from one status to another during the rollback process:

Sr. No.	Batch	Event	Pre Event Transaction Status	Pre Event Transaction Leg Status	Post Event Transaction Status	Post Event Transaction Leg Status
1	C1-TXNRB	Transactions with the Error (EROR) status are rolled back	ERROR	ERROR	UPLOADED	Not applicable as the transaction legs are not yet created
2	C1-TXNRB	Transactions with the Ignored (IGNR) status are rolled back	IGNORED	IGNORED	UPLOADED	Not applicable as the transaction legs are not yet created

Transaction Cancellation

The following table indicates how a transaction leg moves from one status to another during the cancellation process:

Sr. No.	Batch	Event	Pre Event Transaction Status	Pre Event Transaction Leg Status	Post Event Transaction Status	Post Event Transaction Leg Status
1	C1-TXCNC	Transactions in any status are cancelled	UPLOADED, INITIAL PRODUCT DETERMINED, ERROR, COMPLETED,	INITIAL PRODUCT DETERMINED, ERROR, IGNORED, or COMPLETED	CANCELLED	CANCELLED

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Sr. No.	Batch	Event	Pre Event Transaction Status	Pre Event Transaction Leg Status	Post Event Transaction Status	Post Event Transaction Leg Status
			INVALID, or IGNORED			

Transaction Disaggregation

The following table indicates how a transaction leg moves from one status to another during the disaggregation process:

Sr. No.	Batch	Event	Pre Event Transaction Status	Pre Event Transaction Leg Status	Post Event Transaction Status	Post Event Transaction Leg Status
1	C1-DISTG	Transactions in the COMPLETED, ERROR, or IGNORED status are disaggregated.	COMPLETED, ERROR, or IGNORED **Note:** The transactions in the ERROR or IGNORED status must have legs for disaggregation.	COMPLETED, ERROR, or IGNORED	No change in the status	No change in the status
2	C1-DISTG	Transactions in the INVALID or CANCELLED status cannot be disaggregated. In addition, the newly uploaded transactions and fully disaggregated transactions which are in the UPLOADED status cannot be disaggregated.	CANCELLED, INVALID, or UPLOADED	Not applicable as the transactions will not have any legs in these statuses	No change in the status	Not applicable as the transactions will not have any legs in these statuses
3	C1-IDENT	Transactions in the COMPLETED, ERROR, or IGNORED status are disaggregated.	COMPLETED, ERROR, or IGNORED **Note:** The transactions in the ERROR or IGNORED status must have legs for disaggregation.	COMPLETED, ERROR, or IGNORED	No change in the status	No change in the status
4	C1-IDENT	Transaction has already been disaggregated and is in the UPLOADED status. The transaction legs which were not affected are moved in the staging table and the transaction legs which	UPLOADED	UPLOADED	No change in the status	No change in the status

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Sr. No.	Batch	Event	Pre Event Transaction Status	Pre Event Transaction Leg Status	Post Event Transaction Status	Post Event Transaction Leg Status
		were affected are deleted. Now, if the effective pricing is changed for the account to which the transaction leg in the staging table is mapped, then that transaction leg must be disaggregated. Thus, disaggregation is done even though the transaction is in the UPLOADED status.				
5	C1-PDTXN	Transactions in the COMPLETED, ERROR, or IGNORED status are disaggregated.	COMPLETED, ERROR, or IGNORED **Note:** The transactions in the ERROR or IGNORED status must have legs for disaggregation.	COMPLETED, ERROR, or IGNORED	UPLOADED	Transaction legs which are affected during disaggregation are deleted and the other legs which are not affected are moved to the staging table.

Transaction Reaggregation

The following table indicates how a transaction leg moves from one status to another during the reaggregation process:

Sr. No.	Batch	Event	Transaction Status Before Disaggregation	Transaction Leg Status Before Disaggregation	Transaction Status After Reaggregation	Transaction Leg Status After Reaggregation
1	C1-TXNIP	Transaction in the COMPLETED status was disaggregated. It had four transaction legs - two in the COMPLETED status and other two in the IGNORED status. A transaction leg in the COMPLETED status was disaggregated due to change in the business rule (i.e. **IGNORE_SW** is set to **Y**).	COMPLETED	COMPLETED, IGNORED	COMPLETED	Derived Leg: IGNORED Existing Legs: COMPLETED and IGNORED

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Sr. No.	Batch	Event	Transaction Status Before Disaggregation	Transaction Leg Status Before Disaggregation	Transaction Status After Reaggregation	Transaction Leg Status After Reaggregation
2	C1-TXNIP	Transaction in the COMPLETED status was disaggregated. It had one transaction leg in the COMPLETED status and all other transaction legs in the IGNORED status. The leg in the COMPLETED status was disaggregated due to change in the business rule (i.e. **IGNORE_SW** is set to **Y**).	COMPLETED	COMPLETED, IGNORED	IGNORED	Derived Leg: IGNORED Existing Legs: IGNORED
3	C1-TXNIP	Transaction in the COMPLETED status was disaggregated. All the transaction legs were in the COMPLETED status. One of the transaction legs in the COMPLETED status was disaggregated. During reaggregation, no product was derived for this transaction leg.	COMPLETED	COMPLETED	ERROR	Derived Leg: No new transaction leg was created Existing Legs: COMPLETED
4	C1-TXNIP	Transaction in the ERROR status was disaggregated. It had no transaction legs. During reaggregation, no product was derived for the transaction.	ERROR	No Transaction Legs Exist	ERROR	Derived Leg: No new transaction leg was created Existing Legs: None
5	C1-TXNIP	Transaction in the ERROR status was disaggregated. It had no transaction legs. During reaggregation, a	ERROR	No Transaction Legs Exist	INITIAL PRODUCT DETERMINED	Derived Leg: INITIAL PRODUCT DETERMINED

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Sr. No.	Batch	Event	Transaction Status Before Disaggregation	Transaction Leg Status Before Disaggregation	Transaction Status After Reaggregation	Transaction Leg Status After Reaggregation
		product was derived for the transaction.				Existing Legs: None
6	C1-TXNVP and C1-TXNEX	Transaction in the COMPLETED status was disaggregated. It had four transaction legs - two in the COMPLETED status and other two in the IGNORED status. A transaction leg in the COMPLETED status was disaggregated. During reaggregation, the effective pricing was not found for the transaction leg.	COMPLETED	COMPLETED, IGNORED	ERROR	Derived Leg: ERROR Existing Legs: COMPLETED and IGNORED
7	C1-TXNVP and C1-TXNEX	Transaction in the ERROR status was disaggregated. It had no transaction legs. During reaggregation, the effective pricing is found for the transaction legs.	ERROR	No Transaction Legs Exist	INITIAL PRODUCT DETERMINED	Derived Legs: INITIAL PRODUCT DETERMINED Existing Legs: None
8	C1-TXNVP and C1-TXNEX	Transaction in the COMPLETED status was disaggregated. It had four transaction legs - two in the COMPLETED status and other two in the IGNORED status. A transaction leg in the COMPLETED status was disaggregated due to change in the effective pricing (i.e. **Ignore Transaction** flag is set to **Y**).	COMPLETED	COMPLETED, IGNORED	COMPLETED	Derived Leg: IGNORED Existing Legs: COMPLETED and IGNORED

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Sr. No.	Batch	Event	Transaction Status Before Disaggregation	Transaction Leg Status Before Disaggregation	Transaction Status After Reaggregation	Transaction Leg Status After Reaggregation
9	C1-TXNVP and C1-TXNEX	Transaction in the COMPLETED status was disaggregated. It had one transaction leg in the COMPLETED status and all other transaction legs in the IGNORED status. The leg in the COMPLETED status was disaggregated due to change in the effective pricing (i.e. **Ignore Transaction** flag is set to **Y**).	COMPLETED	COMPLETED, IGNORED	IGNORED	Derived Leg: IGNORED Existing Legs: IGNORED
10	C1-TXNSQ and C1-TXNCM	While reaggregating transaction legs, SQIs are not defined for the product - division combination, Transaction aggregation rule is not defined for the SQI, or Exchange rate is not available during currency conversion.	COMPLETED, ERROR, IGNORED **Note:** There must be no legs for the transaction in the IGNORED status.	COMPLETED, ERROR	ERROR	Derived Legs: ERROR Existing Legs: No change in the status
11	C1-TXNSQ and C1-TXNCM	Billable charges are created successfully for all transaction legs which were earlier disaggregated and now reaggregated.	COMPLETED, ERROR, IGNORED **Note:** There must be no legs for the transaction in the IGNORED status.	COMPLETED, ERROR	COMPLETED	Derived Leg: COMPLETED Existing Legs: No change in the status

Transaction Data File

You can upload a transaction data file in the following formats:

- Comma Separated Values

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- JavaScript Object Notation
- Fixed Position
- Pipe Separated Values
- Tilde Separated Values
- Extensible Markup Language

Before uploading a transaction data file, you need to ensure that it contains the following:

- **File Header** - Every file must have one header record. It should contain the following details:

Header Data	Description	Mandatory (Yes or No)
Transaction Source	Used to specify the source from where the transactions are received.	Yes
Header Date (YYYYMMDD)	Used to specify the header date.	Yes
Transaction Header ID	Used to specify the external transaction header ID.	Yes
File Name	Used to specify the file name.	Yes
Number of Transactions	Used to specify the total number of transaction records in the file.	Yes
Total Transaction Volume	Used to specify the total transaction volume.	Yes
Total Transaction Amount	Used to specify the total transaction amount.	Yes

- **Transaction Record** - Every file must have one or more transaction records. It should contain the following details:

Record Data	Description	Mandatory (Yes or No)
Transaction Record Type	Used to specify the record type of the transaction.	Yes
Transaction Source	Used to specify the source from where the transaction is received.	Yes
Transaction Date (YYYYMMDD)	Used to specify the date when the transaction was performed.	Yes
External Reference Number	Used to specify the external reference number of the transaction.	Yes
Customer Reference Number	Used to indicate the customer who has performed the transaction.	No
Division	Used to specify the division to which the transaction belongs.	Yes
Transaction Volume	Used to specify the transaction volume.	Yes
Transaction Amount	Used to specify the transaction amount.	Yes
Transaction Currency	Used to specify the currency in which the transaction was performed. **Note:** If you specify a currency other than the pricing currency, the system will do the currency conversion when the appropriate exchange rate is available in the system.	Yes

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Record Data	Description	Mandatory (Yes or No)
Credit/Debit Indicator	Used to indicate whether the transaction is a debit or a credit transaction. The valid values are: • Plus (+) • Minus (-)	Yes
Account Identifier Type	Used to indicate the account identifier type.	Yes
Account Identifier	Used to indicate the account for which the transaction was performed.	Yes
UDF_NUM_1, UDF_NUM_2, UDF_NUM_3, ..., UDF_NUM_20	Used to specify additional information about the transaction.	No
UDF_AMT_1, UDF_AMT_2, UDF_AMT_3, ..., UDF_AMT_10	Used to specify additional transaction amount.	Yes (Conditional) **Note:** The UDF_AMT_N is required when the corresponding UDF_CCY_N is specified.
UDF_CCY_1, UDF_CCY_2, UDF_CCY_3, ..., UDF_CCY_10	Used to specify additional transaction currency. **Note:** If you specify a currency other than the pricing currency, the system will do the currency conversion when the appropriate exchange rate is available in the system.	Yes (Conditional) **Note:** The UDF_CCY_N is required when the corresponding UDF_AMT_N is specified.
UDF_DTTM_1, UDF_DTTM_2, ..., UDF_DTTM_5	Used to specify additional information about the transaction.	No
UDF_CHAR_1, UDF_CHAR_2, UDF_CHAR_3, ..., UDF_CHAR_50	Used to specify additional information about the transaction. **Note:** If the data in these columns will be used for price item parameter mapping, you must not use the equal to (=) and tilde (~) symbols in these columns.	No

Error List

The following table lists the errors that may occur while executing various batches in the transaction feed management process. It also indicates how you can resolve these errors.

Batch Name	Message Number	Error Message	Message Category	Possible Issues
C1-TXNHV	102	{Checksum Validation Required} field invalid.	11001	The possible issues could be:

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Batch Name	Message Number	Error Message	Message Category	Possible Issues
				• The value other than 'Y', 'y', 'N' or 'n' is specified for the **Checksum Validation Required** parameter.
C1-TXNHV	102	{Duplicate Check Required} field invalid.	11001	The possible issues could be: • The value other than 'Y', 'y', 'N' or 'n' is specified for the **Duplicate Check Required** parameter.
C1-TXNHV	1314	The Transaction Source is mandatory.	17000	The possible issues could be: • The data is not available in the **Transaction Source** column.
C1-TXNHV	1332	Sum of transaction records in the header does not match the total number of records in the file.	17000	The possible issues could be: • Inappropriate file is uploaded in the system.
C1-TXNHV	1333	Sum of transaction volume in the header does not match the total transaction volume in the file.	17000	The possible issues could be: • Inappropriate file is uploaded in the system.
C1-TXNHV	1334	Sum of transaction amount in the header does not match the total transaction amount in the file.	17000	The possible issues could be: • Inappropriate file is uploaded in the system.
C1-TXNHV	1338	The Transaction Header ID already exists in the system. Please enter unique header ID.	17000	The possible issues could be: • The same file is uploaded multiple times in the system.
C1-TXNHV	1341	Exception occurred during the transaction header validation.	17000	The possible issues could be: • The data is not available in the required format.
C1-TXNHV	1421	Transaction records does not exist in the file. Please check.	17000	The possible issues could be: • Inappropriate file is uploaded in the system.
C1-TXNHV	1422	Sum of transaction records in the header cannot be zero. Please enter valid data in the header.	17000	The possible issues could be: • The value available in the **Number of Transactions** column is less than or equal to zero.
C1-TXNHV	1423	Sum of transaction volume in the header cannot be zero. Please enter valid data in the header.	17000	The possible issues could be: • The value available in the **Total Transaction Volume** column is less than or equal to zero.
C1-TXNHV	1663	Transaction Header External Id is missing.	17000	The possible issues could be:

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Batch Name	Message Number	Error Message	Message Category	Possible Issues
				• The data is not available in the **Transaction Header ID** column.
C1-TXNHV	1664	Header Transaction Amount should be greater than 0.	17000	The possible issues could be: • The value available in the **Total Transaction Amount** column is less than or equal to zero.
C1-TXNIP	102	{Chunk Size} field invalid	11001	The possible issues could be: • The value specified for the **Chunk Size** parameter is less than or equal to one.
C1-TXNIP	102	{ Maximum Batch Size } field invalid	11001	The possible issues could be: • The value specified for the **Maximum Batch Count** parameter is greater than the value specified for the **Chunk Size** parameter.
C1-TXNIP	106	Value { Given Transaction Header Id } too long for field { transactionHeaderId }. Maximum length: 14. Found: { Length of given Transaction Header Id}	11001	The possible issues could be: • The value specified for the **Transaction Header ID** parameter exceeds the maximum length of 14 characters.
C1-TXNIP	106	Value { Given Transaction Source Code } too long for field { transactionSource }. Maximum length: 30. Found: { Length of given Transaction Source Code}	11001	The possible issues could be: • The value specified for the **Transaction Source** parameter exceeds the maximum length of 30 characters.
C1-TXNIP	106	Value { Given Transaction Division } too long for field { division }. Maximum length: 5 Found: { Length of given Transaction Division}	11001	The possible issues could be: • The value specified for the **Division** parameter exceeds the maximum length of 5 characters.
C1-TXNIP	1301	The account with the specified identifier does not exist in the system. Enter a valid identifier.	17000	The possible issues could be: • The account with the specified account identifier is not found in the system.
C1-TXNIP	1302	UDF_CURRENCY_1 is mandatory when UDF_AMT_1 is non-zero. Enter a valid currency code.	17000	The possible issues could be: • The currency is not available in the **UDF_CURRENCY_CD_1** column of the **CI_TXN_DETAIL** table.
C1-TXNIP	1303	UDF_AMT_1 is mandatory when UDF_CURRENCY_1 is specified. Enter the amount.	17000	The possible issues could be: • The amount is not available in the **UDF_AMT_1** column of the **CI_TXN_DETAIL** table.

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Batch Name	Message Number	Error Message	Message Category	Possible Issues
C1-TXNIP	1304	UDF_CURRENCY_2 is mandatory when UDF_AMT_2 is non-zero. Enter a valid currency code.	17000	The possible issues could be: • The currency is not available in the **UDF_CURRENCY_CD_2** column of the **CI_TXN_DETAIL** table.
C1-TXNIP	1305	UDF_AMT_2 is mandatory when UDF_CURRENCY_2 is specified. Enter the amount.	17000	The possible issues could be: • The amount is not available in the **UDF_AMT_2** column of the **CI_TXN_DETAIL** table.
C1-TXNIP	1306	UDF_CURRENCY_3 is mandatory when UDF_AMT_3 is non-zero. Enter a valid currency code.	17000	The possible issues could be: • The currency is not available in the **UDF_CURRENCY_CD_3** column of the **CI_TXN_DETAIL** table.
C1-TXNIP	1307	UDF_AMT_3 is mandatory when UDF_CURRENCY_3 is specified. Enter the amount.	17000	The possible issues could be: • The amount is not available in the **UDF_AMT_3** column of the **CI_TXN_DETAIL** table.
C1-TXNIP	1308	UDF_CURRENCY_4 is mandatory when UDF_AMT_4 is non-zero. Enter a valid currency code.	17000	The possible issues could be: • The currency is not available in the **UDF_CURRENCY_CD_4** column of the **CI_TXN_DETAIL** table.
C1-TXNIP	1309	UDF_AMT_4 is mandatory when UDF_CURRENCY_4 is specified. Enter the amount.	17000	The possible issues could be: • The amount is not available in the **UDF_AMT_4** column of the **CI_TXN_DETAIL** table.
C1-TXNIP	1310	UDF_CURRENCY_5 is mandatory when UDF_AMT_5 is non-zero. Enter a valid currency code.	17000	The possible issues could be: • The currency is not available in the **UDF_CURRENCY_CD_5** column of the **CI_TXN_DETAIL** table.
C1-TXNIP	1311	UDF_AMT_5 is mandatory when UDF_CURRENCY_5 is specified. Enter the amount.	17000	The possible issues could be: • The amount is not available in the **UDF_AMT_5** column of the **CI_TXN_DETAIL** table.
C1-TXNIP	1312	UDF_CURRENCY_6 is mandatory when UDF_AMT_6 is non-zero. Enter a valid currency code.	17000	The possible issues could be: • The currency is not available in the **UDF_CURRENCY_CD_6** column of the **CI_TXN_DETAIL** table.
C1-TXNIP	1313	UDF_AMT_6 is mandatory when UDF_CURRENCY_6 is specified. Enter the amount.	17000	The possible issues could be: • The amount is not available in the **UDF_AMT_6** column of the **CI_TXN_DETAIL** table.

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Batch Name	Message Number	Error Message	Message Category	Possible Issues
C1-TXNIP	1314	UDF_CURRENCY_7 is mandatory when UDF_AMT_7 is non-zero. Enter a valid currency code.	17000	The possible issues could be: • The currency is not available in the **UDF_CURRENCY_CD_7** column of the **CI_TXN_DETAIL** table.
C1-TXNIP	1315	UDF_AMT_7 is mandatory when UDF_CURRENCY_7 is specified. Enter the amount.	17000	The possible issues could be: • The amount is not available in the **UDF_AMT_7** column of the **CI_TXN_DETAIL** table.
C1-TXNIP	1316	UDF_CURRENCY_8 is mandatory when UDF_AMT_8 is non-zero. Enter a valid currency code.	17000	The possible issues could be: • The currency is not available in the **UDF_CURRENCY_CD_8** column of the **CI_TXN_DETAIL** table.
C1-TXNIP	1317	UDF_AMT_8 is mandatory when UDF_CURRENCY_8 is specified. Enter the amount.	17000	The possible issues could be: • The amount is not available in the **UDF_AMT_8** column of the **CI_TXN_DETAIL** table.
C1-TXNIP	1318	UDF_CURRENCY_9 is mandatory when UDF_AMT_9 is non-zero. Enter a valid currency code.	17000	The possible issues could be: • The currency is not available in the **UDF_CURRENCY_CD_9** column of the **CI_TXN_DETAIL** table.
C1-TXNIP	1319	UDF_AMT_9 is mandatory when UDF_CURRENCY_9 is specified. Enter the amount.	17000	The possible issues could be: • The amount is not available in the **UDF_AMT_9** column of the **CI_TXN_DETAIL** table.
C1-TXNIP	1320	UDF_CURRENCY_10 is mandatory when UDF_AMT_10 is non-zero. Enter a valid currency code.	17000	The possible issues could be: • The currency is not available in the **UDF_CURRENCY_CD_10** column of the **CI_TXN_DETAIL** table.
C1-TXNIP	1321	UDF_AMT_10 is mandatory when UDF_CURRENCY_10 is specified. Enter the amount.	17000	The possible issues could be: • The amount is not available in the **UDF_AMT_10** column of the **CI_TXN_DETAIL** table.
C1-TXNIP	1347	Could not derive a price item from the rules engine.	17000	The possible issues could be: • There is some technical issue while executing the rule or while processing the rule output. • No rules are effective on the processing date. • The rule type is not defined for the transaction source and transaction record type combination in the system.

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Batch Name	Message Number	Error Message	Message Category	Possible Issues
C1-TXNIP	1349	Division is invalid. Please enter a valid division for the transaction.	17000	The possible issues could be: • Division (to which the transaction belongs) is not defined in the system.
C1-TXNIP	1351	Transaction Currency is invalid. Please enter a valid currency code.	17000	The possible issues could be: • The currency in which the transaction was performed is not available in the **Transaction Currency** column. • Currency is not defined in the system.
C1-TXNIP	1362	UDF Currency 1 is invalid. Please enter a valid currency code.	17000	The possible issues could be: • Currency is not defined in the system.
C1-TXNIP	1363	UDF Currency 2 is invalid. Please enter a valid currency code.	17000	The possible issues could be: • Currency is not defined in the system.
C1-TXNIP	1364	UDF Currency 3 is invalid. Please enter a valid currency code.	17000	The possible issues could be: • Currency is not defined in the system.
C1-TXNIP	1365	UDF Currency 4 is invalid. Please enter a valid currency code.	17000	The possible issues could be: • Currency is not defined in the system.
C1-TXNIP	1366	UDF Currency 5 is invalid. Please enter a valid currency code.	17000	The possible issues could be: • Currency is not defined in the system.
C1-TXNIP	1377	Transaction currency is mandatory when transaction amount is non-zero. Enter a valid currency code.	17000	The possible issues could be: • The currency is not available in the **Transaction Currency** column.
C1-TXNIP	1378	Transaction amount is mandatory when transaction currency is specified. Enter the amount.	17000	The possible issues could be: • The amount is not available in the **Transaction Amount** column.
C1-TXNIP	1379	The user does not exist in the system. Please enter a valid user ID.	17000	The possible issues could be: • The user is not defined in the system.
C1-TXNIP	1380	The value entered in the Credit/Debit Indicator column is incorrect. Enter either "+" or "-".	17000	The possible issues could be: • The value other than “+” or “-” is available in the **HOW_TO_USE_TXN_FLG** column of the **CI_TXN_DETAIL** table.
C1-TXNIP	1381	The value entered in the Manual Switch field is incorrect. Enter either "Y" or "N".	17000	The possible issues could be: • The value other than “Y” or “N” is available in the **MANUAL_SW** column of the **CI_TXN_DETAIL** table.

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Batch Name	Message Number	Error Message	Message Category	Possible Issues
C1-TXNIP	1556	{Maximum Batch Size} field should be greater than zero	17000	The possible issues could be: • The value specified for the **Maximum Batch Count** parameter is less than or equal to zero.
C1-TXNIP	1636	Invalid batch run [%1] for [%2] division(s). %3 **Note:** [%1] stands for batch code; [%2] stands for division; [%3] stands for expected batch code	17000	The possible issues could be: • You are trying to execute the C1-TXNVP, C1-TXNEX, C1-TXNSQ, C1-TXNCM or C1-TXNCU batch instead of the C1-TXNIP batch (which is first mandatory batch in the transaction aggregation cycle).
C1-TXNIP	1637	Batch [%1] is already executed for [%2] division(s). Please complete pending batch runs before starting new cycle for [%3] division(s). **Note:** [%1] stands for batch code; [%2] and [%3] stands for division	17000	The possible issues could be: • You are trying to execute this batch once again with the same division (for example, D1) after executing any other batch in the transaction aggregation cycle which is already initiated for D1.
C1-TXNIP	1638	Transaction Feed Management cycle for individual division(s) is not yet complete. Please complete pending batch runs before starting new cycle for processing [ALL] divisions.	17000	The possible issues could be: • You are trying to execute this batch for all divisions before completing the transaction aggregation cycle which is initiated for a particular division.
C1-TXNIP	1639	Transaction Feed Management cycle for [ALL] divisions is not yet complete. Please complete pending batch runs before starting new cycle for individual division [%1]. **Note:** [%1] stands for division	17000	The possible issues could be: • You are trying to execute this batch for a particular division before completing the transaction aggregation cycle which is initiated for all divisions.
C1-TXNIP	1646	Value for mandatory parameter is missing.	17000	The possible issues could be: • No value is defined for the mandatory price item parameter in the rule.
C1-TXNIP	1647	Mandatory parameter is missing.	17000	The possible issues could be:

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Batch Name	Message Number	Error Message	Message Category	Possible Issues
				• The mandatory price item parameter is not defined as the output parameter in the rule.
C1-TXNIP	1648	Account Number derived by the rule is invalid.	17000	The possible issues could be: • No value is defined for either **Account Identifier (ACCT_NOX_Val)** or **Account Identifier Column Name (ACCT_NOX_Col)** output parameter in the rule.
C1-TXNIP	1649	Account Number type code derived by the rule is invalid.	17000	The possible issues could be: • No value is defined for either **Account Identifier Type (ACCT_NO_TYPEX_Val)** or **Account Identifier Type Column Name (ACCT_NO_TYPEX_Col)** output parameter in the rule.
C1-TXNIP	1650	Division derived by the rule is invalid.	17000	The possible issues could be: • No value is defined for either **Account Division (DIVISIONX_VAL)** or **Account Division Column Name (DIVISIONX_COL)** output parameter in the rule.
C1-TXNIP	1651	Not able to derive account ID.	17000	The possible issues could be: • The account with the specified account identifier type, account identifier, and division is not found in the system.
C1-TXNIP	1652	Product derived by the rule is invalid.	17000	The possible issues could be: • No value is defined for either **Product Name (PRODUCTX_Y_Val)** or **Product Column Name (PRODUCTX_Y_Col)** output parameter in the rule.
C1-TXNIP	1653	Length of the derived product is greater than 10.	17000	The possible issues could be: • The value specified for the **Product Name (PRODUCTX_Y_Val)** or **Product Column Name (PRODUCTX_Y_Col)** output parameter in the rule exceeds the maximum length of 10 characters.
C1-TXNIP	1654	Length of the derived variance parameter is greater than 8.	17000	The possible issues could be: • The value specified for the **TOU (TOUX_Y_Val)** or **TOU Column Name (TOUX_Y_Col)** output

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Batch Name	Message Number	Error Message	Message Category	Possible Issues
				parameter in the rule exceeds the maximum length of 8 characters.
C1-TXNIP	1656	Length of the product parameter value derived by the rule is greater than 254.	17000	The possible issues could be: • The value specified for the **Parameter Value (PVLX_Y_Z_VAL)** or **Parameter Value Column Name (PVLX_Y_Z_COL)** output parameter in the rule exceeds the maximum length of 254 characters.
C1-TXNIP	1657	Length of the product parameter code derived by the rule is greater than 30.	17000	The possible issues could be: • The value specified for the **Parameter Code (PCDX_Y_Z_VAL)** output parameter in the rule exceeds the maximum length of 30 characters.
C1-TXNIP	2002	Transaction is in EROR due to one or more reasons.	17000	The possible issues could be: • There might be one or more reasons why the status of the transaction is set to **Error (EROR)**.
C1-TXNIP	2007	%1 cannot be blank. **Note:** [%1] stands for division	17000	The possible issues could be: • The division to which the transaction belongs is not available in the **Division** column.
C1-TXNIP	2007	%1 cannot be blank. **Note:** [%1] stands for user ID	17000	The possible issues could be: • No data exists in the **USER_ID** column of the **CI_TXN_DETAIL** table when the **MANUAL_SW** column is set to **Y**.
C1-TXNIP	2011	%1 is mandatory when %2 is non-zero. Enter a valid currency code. **Note:** [%1] stands for "Currency Code"; [%2] stands for "Transaction Amount"	17000	The possible issues could be: • The currency in which the transaction was performed is not available in the **CURRENCY_CD** column of the **CI_TXN_DETAIL** table.
C1-TXNIP	2011	%1 is mandatory when %2 is non-zero. Enter a valid currency code.	17000	The possible issues could be:

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Batch Name	Message Number	Error Message	Message Category	Possible Issues
		Note: [%1] stands for "Amount 1 Currency Code"; [%2] stands for "Additional Amount 1"		• The currency is not available in the **UDF_CURRENCY_CD_1** column of the **CI_TXN_DETAIL** table.
C1-TXNIP	2011	%1 is mandatory when %2 is non-zero. Enter a valid currency code. **Note:** [%1] stands for "Amount 2 Currency Code"; [%2] stands for "Additional Amount 2"	17000	The possible issues could be: • The currency is not available in the **UDF_CURRENCY_CD_2** column of the **CI_TXN_DETAIL** table.
C1-TXNIP	2011	%1 is mandatory when %2 is non-zero. Enter a valid currency code. **Note:** [%1] stands for "Amount 3 Currency Code"; [%2] stands for "Additional Amount 3"	17000	The possible issues could be: • The currency is not available in the **UDF_CURRENCY_CD_3** column of the **CI_TXN_DETAIL** table.
C1-TXNIP	2011	%1 is mandatory when %2 is non-zero. Enter a valid currency code. **Note:** [%1] stands for "Amount 4 Currency Code"; [%2] stands for "Additional Amount 4"	17000	The possible issues could be: • The currency is not available in the **UDF_CURRENCY_CD_4** column of the **CI_TXN_DETAIL** table.
C1-TXNIP	2011	%1 is mandatory when %2 is non-zero. Enter a valid currency code. **Note:** [%1] stands for "Amount 5 Currency Code"; [%2] stands for "Additional Amount 5"	17000	The possible issues could be: • The currency is not available in the **UDF_CURRENCY_CD_5** column of the **CI_TXN_DETAIL** table.

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Batch Name	Message Number	Error Message	Message Category	Possible Issues
C1-TXNIP	2011	%1 is mandatory when %2 is non-zero. Enter a valid currency code. **Note:** [%1] stands for "Amount 6 Currency Code"; [%2] stands for "Additional Amount 6"	17000	The possible issues could be: • The currency is not available in the **UDF_CURRENCY_CD_6** column of the **CI_TXN_DETAIL** table.
C1-TXNIP	2011	%1 is mandatory when %2 is non-zero. Enter a valid currency code. **Note:** [%1] stands for "Amount 7 Currency Code"; [%2] stands for "Additional Amount 7"	17000	The possible issues could be: • The currency is not available in the **UDF_CURRENCY_CD_7** column of the **CI_TXN_DETAIL** table.
C1-TXNIP	2011	%1 is mandatory when %2 is non-zero. Enter a valid currency code. **Note:** [%1] stands for "Amount 8 Currency Code"; [%2] stands for "Additional Amount 8"	17000	The possible issues could be: • The currency is not available in the **UDF_CURRENCY_CD_8** column of the **CI_TXN_DETAIL** table.
C1-TXNIP	2011	%1 is mandatory when %2 is non-zero. Enter a valid currency code. **Note:** [%1] stands for "Amount 9 Currency Code"; [%2] stands for "Additional Amount 9"	17000	The possible issues could be: • The currency is not available in the **UDF_CURRENCY_CD_9** column of the **CI_TXN_DETAIL** table.
C1-TXNIP	2011	%1 is mandatory when %2 is non-zero. Enter a valid currency code.	17000	The possible issues could be:

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Batch Name	Message Number	Error Message	Message Category	Possible Issues
		Note: [%1] stands for "Amount 10 Currency Code"; [%2] stands for "Additional Amount 10"		• The currency is not available in the **UDF_CURRENCY_CD_10** column of the **CI_TXN_DETAIL** table.
C1-TXNIP	2012	%1 %2 is invalid. Please enter a valid currency code. **Note:** [%1] stands for "Currency Code"; [%2] stands for transaction currency	17000	The possible issues could be: • Currency is not defined in the system.
C1-TXNIP	2012	%1 %2 is invalid. Please enter a valid currency code. **Note:** [%1] stands for "Amount 1 Currency Code"; [%2] stands for UDF_CURRENCY_CD_1	17000	The possible issues could be: • Currency is not defined in the system.
C1-TXNIP	2012	%1 %2 is invalid. Please enter a valid currency code. **Note:** [%1] stands for "Amount 2 Currency Code"; [%2] stands for UDF_CURRENCY_CD_2	17000	The possible issues could be: • Currency is not defined in the system.
C1-TXNIP	2012	%1 %2 is invalid. Please enter a valid currency code. **Note:** [%1] stands for "Amount 3 Currency Code"; [%2] stands for UDF_CURRENCY_CD_3	17000	The possible issues could be: • Currency is not defined in the system.
C1-TXNIP	2012	%1 %2 is invalid. Please enter a valid currency code.	17000	The possible issues could be: • Currency is not defined in the system.

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Batch Name	Message Number	Error Message	Message Category	Possible Issues
		Note: [%1] stands for "Amount 4 Currency Code"; [%2] stands for UDF_CURRENCY_CD_4		
C1-TXNIP	2012	%1 %2 is invalid. Please enter a valid currency code. **Note:** [%1] stands for "Amount 5 Currency Code"; [%2] stands for UDF_CURRENCY_CD_5	17000	The possible issues could be: • Currency is not defined in the system.
C1-TXNIP	2012	%1 %2 is invalid. Please enter a valid currency code. **Note:** [%1] stands for "Amount 6 Currency Code"; [%2] stands for UDF_CURRENCY_CD_6	17000	The possible issues could be: • Currency is not defined in the system.
C1-TXNIP	2012	%1 %2 is invalid. Please enter a valid currency code. **Note:** [%1] stands for "Amount 7 Currency Code"; [%2] stands for UDF_CURRENCY_CD_7	17000	The possible issues could be: • Currency is not defined in the system.
C1-TXNIP	2012	%1 %2 is invalid. Please enter a valid currency code. **Note:** [%1] stands for "Amount 8 Currency Code"; [%2] stands for UDF_CURRENCY_CD_8	17000	The possible issues could be: • Currency is not defined in the system.
C1-TXNIP	2012	%1 %2 is invalid. Please enter a valid currency code.	17000	The possible issues could be: • Currency is not defined in the system.

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Batch Name	Message Number	Error Message	Message Category	Possible Issues
		Note: [%1] stands for "Amount 9 Currency Code"; [%2] stands for UDF_CURRENCY_CD_9		
C1-TXNIP	2012	%1 %2 is invalid. Please enter a valid currency code. **Note:** [%1] stands for "Amount 10 Currency Code"; [%2] stands for UDF_CURRENCY_CD_10	17000	The possible issues could be: • Currency is not defined in the system.
C1-TXNIP	2013	The user %1 does not exist in the system. Please enter a valid user ID. **Note:** [%1] stands for user ID	17000	The possible issues could be: • The user is not defined in the system.
C1-TXNIP	2014	%1 derived using %2 by the rule is invalid. **Note:** [%1] stands for "Account Number" [%2] stands for the ACCT_NOX_Val or ACCT_NOX_Col output parameter	17000	The possible issues could be: • No value is defined for either **Account Identifier (ACCT_NOX_Val)** or **Account Identifier Column Name (ACCT_NOX_Col)** output parameter in the rule.
C1-TXNIP	2014	%1 derived using %2 by the rule is invalid. **Note:** [%1] stands for "Account Identifier Type" [%2] stands for the ACCT_NO_TYPEX_Val or ACCT_NO_TYPEX_Col output parameter	17000	The possible issues could be: • No value is defined for either **Account Identifier Type (ACCT_NO_TYPEX_Val)** or **Account Identifier Type Column Name (ACCT_NO_TYPEX_Col)** output parameter in the rule.
C1-TXNIP	2014	%1 derived using %2 by the rule is invalid.	17000	The possible issues could be: • No value is defined for either **Account Division (DIVISIONX_VAL)** or

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Batch Name	Message Number	Error Message	Message Category	Possible Issues
		Note: [%1] stands for "Division" [%2] stands for the DIVISIONX_VAL or DIVISIONX_COL output parameter		**Account Division Column Name (DIVISIONX_COL)** output parameter in the rule.
C1-TXNIP	2014	%1 derived using %2 by the rule is invalid. **Note:** [%1] stands for "Initial Product Code" [%2] stands for the PRODUCTX_Y_Val or PRODUCTX_Y_Col output parameter	17000	The possible issues could be: • No value is defined for either **Product Name (PRODUCTX_Y_Val)** or **Product Column Name (PRODUCTX_Y_Col)** output parameter in the rule.
C1-TXNIP	2015	Not able to derive account id for given Account Number %1, Account Number Type Code %2 and Division %3. **Note:** [%1] stands for account identifier; [%2] stands for account identifier type; [%3] stands for division	17000	The possible issues could be: • The account with the specified account identifier type, account identifier and division is not found in the system.
C1-TXNIP	2016	Length of the derived %1 using %2 by the rule is greater than %3. **Note:** [%1] stands for "Initial Product Code"; [%2] stands for PRODUCTX_Y_Val or PRODUCTX_Y_Col output parameter; [%3] stands for length of product code (i.e. 30)	17000	The possible issues could be: • The value specified for the **Product Name (PRODUCTX_Y_Val)** or **Product Column Name (PRODUCTX_Y_Col)** output parameter in the rule exceeds the maximum length of 30 characters.

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Batch Name	Message Number	Error Message	Message Category	Possible Issues
C1-TXNIP	2016	Length of the derived %1 using %2 by the rule is greater than %3. **Note:** [%1] stands for "Variance Parameter"; [%2] stands for TOUX_Y_Val or TOUX_Y_Col output parameter; [%3] stands for length of variance parameter (i.e. 8)	17000	The possible issues could be: • The value specified for the **TOU (TOUX_Y_Val)** or **TOU Column Name (TOUX_Y_Col)** output parameter in the rule exceeds the maximum length of 8 characters.
C1-TXNIP	2016	Length of the derived %1 using %2 by the rule is greater than %3. **Note:** [%1] stands for "Parameter"; [%2] stands for PCDX_Y_Z_VAL output parameter; [%3] stands for length of parameter (i.e. 30)	17000	The possible issues could be: • The value specified for the **Parameter Code (PCDX_Y_Z_VAL)** output parameter in the rule exceeds the maximum length of 30 characters.
C1-TXNIP	2016	Length of the derived %1 using %2 by the rule is greater than %3. **Note:** [%1] stands for "Parameter Value"; [%2] stands for PVLX_Y_Z_VAL or PVLX_Y_Z_COL output parameter; [%3] stands for length of parameter value (i.e. 254)	17000	The possible issues could be: • The value specified for the **Parameter Value (PVLX_Y_Z_VAL)** or **Parameter Value Column Name (PVLX_Y_Z_COL)** output parameter in the rule exceeds the maximum length of 254 characters.
C1-TXNIP	2017	Mandatory parameter %1 is missing for %2 %3 and processing date %4.	17000	The possible issues could be:

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Batch Name	Message Number	Error Message	Message Category	Possible Issues
		Note: [%1] stands for the product parameter code; [%2] stands for "Initial Product Code" [%3] stands for the product code [%4] stands for the processing date		• The mandatory product parameter is not defined as the output parameter in the rule.
C1-TXNIP	2018	Value for mandatory parameter %1 is missing for product %2 and processing date %3. **Note:** [%1] stands for product parameter code; [%2] stands for product code; [%3] stands for processing date	17000	The possible issues could be: • No value is defined for the mandatory product parameter in the rule.
C1-TXNIP	2019	Value of the derived %1 %2 contains '~' or '='. **Note:** [%1] stands for parameter code [%2] stands for parameter value	17000	The possible issues could be: • The parameter code or value contains the equal to (=) and tide (~) symbols.
C1-TXNIP	2037	Error during executing rules for transaction record type %1, transaction source %2 and processing date %3. **Note:** [%1] stands for transaction record type; [%2] stands for transaction source; [%3] stands for processing date	17000	The possible issues could be: • There is some technical issue while executing the rule or while processing the rule output. • No rules are effective on the processing date. • The rule type is not defined for the transaction source and transaction record type combination in the system.
C1-TXNIP	2043	Unable to derive Rule Type with Transaction Source %1 and Transaction Record Type %2.	17000	The possible issues could be: • The rule type is not defined for the transaction source and transaction record type combination in the system.

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Batch Name	Message Number	Error Message	Message Category	Possible Issues
		Note: [%1] stands for transaction source; [%2] stands for transaction record type		
C1-TXNIP	2087	Division %1 is invalid. Please enter a valid division for the transaction. **Note:** [%1] stands for division	17000	The possible issues could be: • Division (to which the transaction belongs) is not defined in the system.
C1-TXNVP	102	{Chunk Size} field invalid	11001	The possible issues could be: • The value specified for the **Chunk Size** parameter is less than or equal to one.
C1-TXNVP	106	Value { Given Transaction Header Id } too long for field { transactionHeaderId }. Maximum length: 14. Found: { Length of given Transaction Header Id}	11001	The possible issues could be: • The value specified for the **Transaction Header ID** parameter exceeds the maximum length of 14 characters.
C1-TXNVP	106	Value { Given Transaction Source Code } too long for field { transactionSource }. Maximum length: 30. Found: { Length of given Transaction Source Code}	11001	The possible issues could be: • The value specified for the **Transaction Source** parameter exceeds the maximum length of 30 characters.
C1-TXNVP	106	Value { Given Transaction Division } too long for field { division }. Maximum length: 5 Found: { Length of given Transaction Division}	11001	The possible issues could be: • The value specified for the **Division** parameter exceeds the maximum length of 5 characters.
C1-TXNVP	1636	Invalid batch run [%1] for [%2] division(s). %3 **Note:** [%1] stands for batch code; [%2] stands for division; [%3] stands for expected batch code	17000	The possible issues could be: • You are trying to execute the C1-TXNVP batch before executing the C1-TXNIP batch (which is first mandatory batch in the transaction aggregation cycle). • You are trying to execute the C1-TXNVP batch in between the C1-TXNCM and C1-TXNCU batches during the transaction aggregation cycle.
C1-TXNVP	1638	Transaction Feed Management cycle for individual division(s) is not yet complete. Please complete pending batch runs	17000	The possible issues could be: • You are trying to execute this batch for all divisions before completing the

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Batch Name	Message Number	Error Message	Message Category	Possible Issues
		before starting new cycle for processing [ALL] divisions.		transaction aggregation cycle which is initiated for a particular division.
C1-TXNVP	1639	Transaction Feed Management cycle for [ALL] divisions is not yet complete. Please complete pending batch runs before starting new cycle for individual division [%1]. **Note:** [%1] stands for division	17000	The possible issues could be: • You are trying to execute this batch for a particular division before completing the transaction aggregation cycle which is initiated for all divisions.
C1-TXNVP	1644	Transaction Feed Management cycle for division(s) [%1] is already in progress with filter [Source= %2, Header= %3] criteria. Filter criteria must be same for complete cycle. **Note:** [%1] stands for division; [%2] stands for transaction source; [%3] stands for transaction header ID	17000	The possible issues could be: • You are trying to execute this batch once again with the same division and different parameters.
C1-TXNEX	102	{Chunk Size} field invalid	11001	The possible issues could be: • The value specified for the **Chunk Size** parameter is less than or equal to one.
C1-TXNEX	102	{ Maximum Batch Size } field invalid	11001	The possible issues could be: • The value specified for the **Maximum Batch Count** parameter is greater than the value specified for the **Chunk Size** parameter.
C1-TXNEX	106	Value { Given Transaction Header Id } too long for field { transactionHeaderId }. Maximum length: 14. Found: { Length of given Transaction Header Id}	11001	The possible issues could be: • The value specified for the **Transaction Header ID** parameter exceeds the maximum length of 14 characters.
C1-TXNEX	106	Value { Given Transaction Source Code } too long for field { transactionSource }. Maximum length: 30. Found: { Length of given Transaction Source Code}	11001	The possible issues could be: • The value specified for the **Transaction Source** parameter exceeds the maximum length of 30 characters.
C1-TXNEX	106	Value { Given Transaction Division } too long for field	11001	The possible issues could be:

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Batch Name	Message Number	Error Message	Message Category	Possible Issues
		{ division }. Maximum length: 5 Found: { Length of given Transaction Division}		• The value specified for the **Division** parameter exceeds the maximum length of 5 characters.
C1-TXNEX	790	The selected Member account does not have active Contracts.	17000	The possible issues could be: • There are no contracts for the account in **Active**, **Pending Stop**, or **Stop** status on the transaction date.
C1-TXNEX	1336	Effective pricing is not available for the product. Please check.	17000	The possible issues could be: • The effective pricing is not available for the product.
C1-TXNEX	1392	Invalid configuration of Price Search Algorithm Parameters or Contracts or Schedule Periods.	17000	The possible issues could be: • The parameter values are either not defined or invalid in the **Price Assignment Search** algorithm (which is associated with the division). • The period in which the transaction date falls is not defined in the aggregation schedule. • There are multiple effective contracts of the same contract type (available on the transaction date) in **Active**, **Pending Stop**, or **Stop** status.
C1-TXNEX	1556	{Maximum Batch Size} field should be greater than zero	17000	The possible issues could be: • The value specified for the **Maximum Batch Count** parameter is less than or equal to zero.
C1-TXNEX	1588	No Schedule Period found for the transaction date.	17000	The possible issues could be: • The period in which the transaction date falls is not defined in the aggregation schedule.
C1-TXNEX	1611	Division specific Price Search Algorithm is not configured.	17000	The possible issues could be: • The **Price Assignment Search** algorithm is not defined for the division.
C1-TXNEX	1612	Price Search Algorithm parameters are not set or are invalid.	17000	The possible issues could be: • The parameter values are either not defined or invalid in the **Price Assignment Search** algorithm (which is associated with the division).
C1-TXNEX	1613	Multiple contracts in Active, Pending Stop, Stop status exists for same contract type.	17000	The possible issues could be: • There are multiple effective contracts of the same contract type in **Active**,

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Batch Name	Message Number	Error Message	Message Category	Possible Issues
				Pending Stop, or **Stop** status on the transaction date.
C1-TXNEX	1636	Invalid batch run [%1] for [%2] division(s). %3 **Note:** [%1] stands for batch code; [%2] stands for division; [%3] stands for expected batch code	17000	The possible issues could be: • You are trying to execute the C1-TXNEX batch before executing the C1-TXNIP batch (which is first mandatory batch in the transaction aggregation cycle). • You are trying to execute the C1-TXNEX batch in between the C1-TXNCM and C1-TXNCU batches during the transaction aggregation cycle.
C1-TXNEX	1638	Transaction Feed Management cycle for individual division(s) is not yet complete. Please complete pending batch runs before starting new cycle for processing [ALL] divisions.	17000	The possible issues could be: • You are trying to execute this batch for all divisions before completing the transaction aggregation cycle which is initiated for a particular division.
C1-TXNEX	1639	Transaction Feed Management cycle for [ALL] divisions is not yet complete. Please complete pending batch runs before starting new cycle for individual division [%1]. **Note:** [%1] stands for division	17000	The possible issues could be: • You are trying to execute this batch for a particular division before completing the transaction aggregation cycle which is initiated for all divisions.
C1-TXNEX	1644	Transaction Feed Management cycle for division(s) [%1] is already in progress with filter [Source= %2, Header= %3] criteria. Filter criteria must be same for complete cycle. **Note:** [%1] stands for division; [%2] stands for transaction source; [%3] stands for transaction header ID	17000	The possible issues could be: • You are trying to execute this batch once again with the same division and different parameters.
C1-TXNIP	2003	One or more Sub Transactions are in EROR state.	17000	The possible issues could be: • One or more transaction legs are in the **Error (EROR)** status.

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Batch Name	Message Number	Error Message	Message Category	Possible Issues
C1-TXNEX	2006	No active contract exists for account %1, product %2 and transaction date %3. **Note:** [%1] stands for derived account; [%2] stands for derived product; and [%3] stands for transaction date	17000	The possible issues could be: • There is no contract with the specified contract type available on the transaction date. • The contract is inactive.
C1-TXNEX	2020	Invalid configuration of Price Search Algorithm Parameters or Contracts or Schedule Periods for division %1, account %2, product %3, transaction date %4 and processing date %5. **Note:** [%1] stands for derived division; [%2] stands for derived account; [%3] stands for derived product; [%4] stands for transaction date; [%5] stands for processing date	17000	The possible issues could be: • The parameter values are either not defined or invalid in the **Price Assignment Search** algorithm (which is associated with the division). • The period in which the transaction date falls is not defined in the aggregation schedule. • There are multiple effective contracts of the same contract type (available on the transaction date) in **Active**, **Pending Stop**, or **Stop** status.
C1-TXNEX	2021	Division specific Price Search Algorithm is not configured for division %1 and processing date %2. **Note:** [%1] stands for derived division; [%2] stands for processing date	17000	The possible issues could be: • The **Price Assignment Search** algorithm is not defined for the derived division on the processing date.
C1-TXNEX	2022	Price Search Algorithm parameters are not set or are invalid for division %1 and processing date %2. **Note:** [%1] stands for derived division; [%2] stands for processing date	17000	The possible issues could be: • The parameter values are either not defined or invalid in the **Price Assignment Search** algorithm which is associated with the derived division on the processing date.
C1-TXNEX	2023	Effective pricing is not available for account %1,	17000	The possible issues could be:

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Batch Name	Message Number	Error Message	Message Category	Possible Issues
		product %2, parameters %3 and processing date %4. **Note:** [%1] stands for derived account; [%2] stands for derived product; [%3] stands for derived product parameter; [%4] stands for processing date		• The effective pricing is not available for the account, product and product parameters combination on the processing date.
C1-TXNEX	2024	No Schedule Period found for product %1, price assignment id %2 and transaction date %3. **Note:** [%1] stands for derived product; [%2] stands for price assignment ID; [%3] stands for transaction date	17000	The possible issues could be: • The period in which the transaction date falls is not defined in the aggregation schedule (which is used in the product pricing).
C1-TXNEX	2025	Multiple contracts in Active, Pending Stop, Stop status exists for same contract type against account %1, product %2 and transaction date %3. **Note:** [%1] stands for derived account; [%2] stands for derived product; [%3] stands for transaction date	17000	The possible issues could be: • There are multiple effective contracts of the same contract type in **Active**, **Pending Stop**, or **Stop** status on the transaction date.
C1-TXNEX	2026	No active contract exists for account %1, product %2 and transaction date %3. **Note:** [%1] stands for derived account; [%2] stands for derived product; [%3] stands for transaction date	17000	The possible issues could be: • There are no contracts for the account in **Active**, **Pending Stop**, or **Stop** status on the transaction date.
C1-TXNSQ	102	{ Maximum Batch Size } field invalid	11001	The possible issues could be:

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Batch Name	Message Number	Error Message	Message Category	Possible Issues
				• The value specified for the **Maximum Batch Count** parameter is greater than the value specified for the **Chunk Size** parameter.
C1-TXNSQ	102	{Chunk Size} field invalid	11001	The possible issues could be: • The value specified for the **Chunk Size** parameter is less than or equal to one.
C1-TXNSQ	106	Value { Given Transaction Header Id } too long for field { transactionHeaderId }. Maximum length: 14. Found: { Length of given Transaction Header Id}	11001	The possible issues could be: • The value specified for the **Transaction Header ID** parameter exceeds the maximum length of 14 characters.
C1-TXNSQ	106	Value { Given Transaction Source Code } too long for field { transactionSource }. Maximum length: 30. Found: { Length of given Transaction Source Code}	11001	The possible issues could be: • The value specified for the **Transaction Source** parameter exceeds the maximum length of 30 characters.
C1-TXNSQ	106	Value { Given Transaction Division } too long for field { division }. Maximum length: 5 Found: { Length of given Transaction Division}	11001	The possible issues could be: • The value specified for the **Division** parameter exceeds the maximum length of 5 characters.
C1-TXNSQ	1388	Data configuration error for { ENV_ID }.	17000	The possible issues could be: • No data exists in the **ENV_ID** column of the **CI_INSTALLATION** table. • The data available in the **ENV_ID** column of the **CI_INSTALLATION** table is not properly cached.
C1-TXNSQ	1388	Data configuration error for { SQI Fragment }.	17000	The possible issues could be: • No data exists in the **SQL_FRAG**, **TXN_PRM**, **SQI_CD**, and **SQL_FUNC** columns of the **CI_TXN_SQI_FRAG** table. • The data available in the **SQL_FRAG**, **TXN_PRM**, **SQI_CD**, and **SQL_FUNC** columns of the **CI_TXN_SQI_FRAG** table is not properly cached.
C1-TXNSQ	1388	Data configuration error for { Price Item SQI }.	17000	The possible issues could be: • No data exists in the **PRICEITEM_CD**, **CIS_DIVISION**, and **SQI_CD** columns of the **CI_PRICEITEM_SQI** table.

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Batch Name	Message Number	Error Message	Message Category	Possible Issues
				• The data available in the **PRICEITEM_CD**, **CIS_DIVISION**, and **SQI_CD** columns of the **CI_PRICEITEM_SQI** table is not properly cached.
C1-TXNSQ	1556	{Maximum Batch Size} field should be greater than zero	17000	The possible issues could be: • The value specified for the **Maximum Batch Count** parameter is less than or equal to zero.
C1-TXNSQ	1636	Invalid batch run [%1] for [%2] division(s). %3 **Note:** [%1] stands for batch code; [%2] stands for division; [%3] stands for expected batch code	17000	The possible issues could be: • You are trying to execute the C1-TXNSQ batch before executing the C1-TXNIP batch (which is first mandatory batch in the transaction aggregation cycle). • You are trying to execute the C1-TXNSQ batch in between the C1-TXNCM and C1-TXNCU batches during the transaction aggregation cycle.
C1-TXNSQ	1638	Transaction Feed Management cycle for individual division(s) is not yet complete. Please complete pending batch runs before starting new cycle for processing [ALL] divisions.	17000	The possible issues could be: • You are trying to execute this batch for all divisions before completing the transaction aggregation cycle which is initiated for a particular division.
C1-TXNSQ	1639	Transaction Feed Management cycle for [ALL] divisions is not yet complete. Please complete pending batch runs before starting new cycle for individual division [%1]. **Note:** [%1] stands for division	17000	The possible issues could be: • You are trying to execute this batch for a particular division before completing the transaction aggregation cycle which is initiated for all divisions.
C1-TXNSQ	1644	Transaction Feed Management cycle for division(s) [%1] is already in progress with filter [Source= %2, Header= %3] criteria. Filter criteria must be same for complete cycle.	17000	The possible issues could be: • You are trying to execute this batch once again with the same division and different parameters.

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Batch Name	Message Number	Error Message	Message Category	Possible Issues
		Note: [%1] stands for division; [%2] stands for transaction source; [%3] stands for transaction header ID		
C1-TXNSQ	2003	One or more Sub Transactions are in EROR state.	17000	The possible issues could be: • One or more transaction legs are in the **Error (EROR)** status.
C1-TXNSQ	2026	SQIs not configured for product %1 and division %2. **Note:** [%1] stands for final product code; [%2] stands for derived division	17000	The possible issues could be: • The SQIs are not defined for the product - division combination.
C1-TXNSQ	2027	Currency Conversion from Currency [%1] to Currency [%2] not successful.	17000	The possible issues could be: • The exchange rate is not available during currency conversion.
C1-TXNCM	102	{Chunk Size} field invalid	11001	The possible issues could be: • The value specified for the **Chunk Size** parameter is less than or equal to one.
C1-TXNCM	102	{ Maximum Batch Size } field invalid	11001	The possible issues could be: • The value specified for the **Maximum Batch Count** parameter is greater than the value specified for the **Chunk Size** parameter.
C1-TXNCM	106	Value { Given Transaction Header Id } too long for field { transactionHeaderId }. Maximum length: 14. Found: { Length of given Transaction Header Id}	11001	The possible issues could be: • The value specified for the **Transaction Header ID** parameter exceeds the maximum length of 14 characters.
C1-TXNCM	106	Value { Given Transaction Source Code } too long for field { transactionSource }. Maximum length: 30. Found: { Length of given Transaction Source Code}	11001	The possible issues could be: • The value specified for the **Transaction Source** parameter exceeds the maximum length of 30 characters.
C1-TXNCM	106	Value { Given Transaction Division } too long for field	11001	The possible issues could be:

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Batch Name	Message Number	Error Message	Message Category	Possible Issues
		{ division }. Maximum length: 5 Found: { Length of given Transaction Division}		• The value specified for the **Division** parameter exceeds the maximum length of 5 characters.
C1-TXNCM	1393	Either the transaction feed management setup is incomplete, or there is no active contract available.	17000	The possible issues could be: • The SQIs are not defined for the product - division combination. • The transaction aggregation rule is not defined for the SQI. • There is no contract with the specified contract type available in the system. • The contract is inactive.
C1-TXNCM	1556	{Maximum Batch Size} field should be greater than zero	17000	The possible issues could be: • The value specified for the **Maximum Batch Count** parameter is less than or equal to zero.
C1-TXNCM	1636	Invalid batch run [%1] for [%2] division(s). %3 **Note:** [%1] stands for batch code; [%2] stands for division; [%3] stands for expected batch code	17000	The possible issues could be: • You are trying to execute the C1-TXNCM batch before executing the C1-TXNIP batch.
C1-TXNCM	1638	Transaction Feed Management cycle for individual division(s) is not yet complete. Please complete pending batch runs before starting new cycle for processing [ALL] divisions.	17000	The possible issues could be: • You are trying to execute this batch for all divisions before completing the transaction aggregation cycle which is initiated for a particular division.
C1-TXNCM	1639	Transaction Feed Management cycle for [ALL] divisions is not yet complete. Please complete pending batch runs before starting new cycle for individual division [%1]. **Note:** [%1] stands for division	17000	The possible issues could be: • You are trying to execute this batch for a particular division before completing the transaction aggregation cycle which is initiated for all divisions.
C1-TXNCM	1644	Transaction Feed Management cycle for division(s) [%1] is already in progress with filter [Source= %2, Header= %3] criteria. Filter criteria must be same for complete cycle.	17000	The possible issues could be: • You are trying to execute this batch once again with the same division and different parameters.

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Batch Name	Message Number	Error Message	Message Category	Possible Issues
		Note: [%1] stands for division; [%2] stands for transaction source; [%3] stands for transaction header ID		
C1-TXNCM	2003	One or more Sub Transactions are in EROR state.	17000	The possible issues could be: • One or more transaction legs are in the **Error (EROR)** status.
C1-TXNCM	2026	SQIs not configured for product %1 and division %2. **Note:** [%1] stands for final product code; [%2] stands for derived division	17000	The possible issues could be: • The SQIs are not defined for the product - division combination.
C1-TXNCM	2027	Currency Conversion from Currency [%1] to Currency [%2] not successful.	17000	The possible issues could be: • The exchange rate is not available during currency conversion.
C1-TXNCU	101	{ Disaggregation From Date} field missing	11001	The possible issues could be: • No value is specified for the **Disaggregate Transactions From Date** parameter when the request type is set to DISAGG.
C1-TXNCU	101	{ Request Type} field missing	11001	The possible issues could be: • No value is specified for the **Request Type** parameter.
C1-TXNCU	101	{ Transaction Header Id } field missing	11001	The possible issues could be: • No value is specified for the **Transaction Header ID** parameter when the request type is set to CNCL.
C1-TXNCU	102	{Chunk Size} field invalid	11001	The possible issues could be: • The value specified for the **Chunk Size** parameter is less than or equal to one.
C1-TXNCU	102	{ Maximum Batch Size } field invalid	11001	The possible issues could be: • The value specified for the **Maximum Batch Count** parameter is greater than

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Batch Name	Message Number	Error Message	Message Category	Possible Issues
				the value specified for the **Chunk Size** parameter.
C1-TXNCU	102	{ Request Type } field invalid	11001	The possible issues could be: • The value other than 'EROR', 'CNCL' or 'DISAGG' is specified for the **Request Type** parameter.
C1-TXNCU	102	{ Transaction Division } field invalid	11001	The possible issues could be: • The value for the **Division** parameter is specified when the request type is set to CNCL.
C1-TXNCU	102	{ Transaction Source Code } field invalid	11001	The possible issues could be: • The value for the **Transaction Source** parameter is specified when the request type is set to CNCL.
C1-TXNCU	102	{Account Id } field invalid	11001	The possible issues could be: • The value for the **Account ID** parameter is specified when the request type is set to CNCL.
C1-TXNCU	102	{Bill Cycle Code } field invalid	11001	The possible issues could be: • The value for the **Bill Cycle** parameter is specified when the request type is set to CNCL.
C1-TXNCU	102	{Disaggregation From Date } field invalid	11001	The possible issues could be: • The value for the **Disaggregate Transactions From Date** parameter is specified when the request type is set to CNCL.
C1-TXNCU	102	{Account Id } field invalid	11001	The possible issues could be: • The value for the **Account ID** parameter is specified when the request type is set to EROR.
C1-TXNCU	102	{Bill Cycle Code } field invalid	11001	The possible issues could be: • The value for the **Bill Cycle** parameter is specified when the request type is set to EROR.
C1-TXNCU	102	{Disaggregation From Date } field invalid	11001	The possible issues could be: • The value for the **Disaggregate Transactions From Date** parameter is specified when the request type is set to EROR.

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Batch Name	Message Number	Error Message	Message Category	Possible Issues
C1-TXNCU	102	{Transaction Header Id } field invalid	11001	The possible issues could be: • The value for the **Transaction Header ID** parameter is specified when the request type is set to DISAGG.
C1-TXNCU	102	{ Transaction Source Code } field invalid	11001	The possible issues could be: • The value for the **Transaction Source** parameter is specified when the request type is set to DISAGG.
C1-TXNCU	106	Value { Given Transaction Header Id } too long for field { transactionHeaderId }. Maximum length: 14. Found: { Length of given Transaction Header Id}	11001	The possible issues could be: • The value specified for the **Transaction Header ID** parameter exceeds the maximum length of 14 characters.
C1-TXNCU	106	Value { Given Transaction Source Code } too long for field { transactionSource }. Maximum length: 30. Found: { Length of given Transaction Source Code}	11001	The possible issues could be: • The value specified for the **Transaction Source** parameter exceeds the maximum length of 30 characters.
C1-TXNCU	106	Value { Given Transaction Division } too long for field { division }. Maximum length: 5 Found: { Length of given Transaction Division}	11001	The possible issues could be: • The value specified for the **Division** parameter exceeds the maximum length of 5 characters.
C1-TXNCU	1388	Data configuration error for { SQI Fragment }.	17000	The possible issues could be: • No data exists in the SQL_FRAG, TXN_PRM, SQI_CD, and SQL_FUNC columns of the CI_TXN_SQI_FRAG table. • The data available in the SQL_FRAG, TXN_PRM, SQI_CD, and SQL_FUNC columns of the CI_TXN_SQI_FRAG table is not properly cached.
C1-TXNCU	1388	Data configuration error for { Price Item SQI }.	17000	The possible issues could be: • No data exists in the PRICEITEM_CD, CIS_DIVISION, and SQI_CD columns of the CI_PRICEITEM_SQI table. • The data available in the PRICEITEM_CD, CIS_DIVISION, and SQI_CD columns of the CI_PRICEITEM_SQI table is not properly cached.
C1-TXNCU	1391	Bill is completed hence cant cancel the header.	17000	The possible issues could be:

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Batch Name	Message Number	Error Message	Message Category	Possible Issues
				• You are trying to cancel a transaction feed for which a bill with the **Complete** status already exists in the system.
C1-TXNCU	1424	There are pending bills for the feed you want to cancel. Please execute the Pending Bill Deletion (C1-DELBL) batch.	17000	The possible issues could be: • The **Pending Bill Deletion (C1-DELBL)** batch is not yet executed to delete the bills (generated for the feed) which are in the **Pending** status.
C1-TXNCU	1556	{Maximum Batch Size} field should be greater than zero	17000	The possible issues could be: • The value specified for the **Maximum Batch Count** parameter is less than or equal to zero.
C1-TXNCU	1636	Invalid batch run [%1] for [%2] division(s). %3 **Note:** [%1] stands for batch code; [%2] stands for division; [%3] stands for expected batch code	17000	The possible issues could be: • You are trying to execute the C1-TXNCU batch before executing the C1-TXNIP or C1-TXNCM batch.
C1-TXNCU	1638	Transaction Feed Management cycle for individual division(s) is not yet complete. Please complete pending batch runs before starting new cycle for processing [ALL] divisions.	17000	The possible issues could be: • You are trying to execute this batch for all divisions before completing the transaction aggregation cycle which is initiated for a particular division.
C1-TXNCU	1639	Transaction Feed Management cycle for [ALL] divisions is not yet complete. Please complete pending batch runs before starting new cycle for individual division [%1]. **Note:** [%1] stands for division	17000	The possible issues could be: • You are trying to execute this batch for a particular division before completing the transaction aggregation cycle which is initiated for all divisions.
C1-TXNCU	1644	Transaction Feed Management cycle for division(s) [%1] is already in progress with filter [Source= %2, Header= %3] criteria. Filter criteria must be same for complete cycle.	17000	The possible issues could be: • You are trying to execute this batch once again with the same division and different parameters.

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Batch Name	Message Number	Error Message	Message Category	Possible Issues
		Note: [%1] stands for division; [%2] stands for transaction source; [%3] stands for transaction header ID		
C1-TXNRB	102	{Chunk Size} field invalid	11001	The possible issues could be: • The value specified for the **Chunk Size** parameter is less than or equal to one.
C1-TXNRB	102	{ Maximum Batch Size } field invalid	11001	The possible issues could be: • The value specified for the **Maximum Batch Count** parameter is greater than the value specified for the **Chunk Size** parameter.
C1-TXNRB	102	{ Status Value } field invalid	11001	The possible issues could be: • The value other than 'ERROR' or 'IGNR' is specified for the **Transaction Status** parameter.
C1-TXNRB	102	{ RollBack From Date } field invalid	11001	The possible issues could be: • The date specified in the **Rollback From Date** parameter is later than the date specified in the **Rollback To Date** parameter.
C1-TXNRB	1556	{Maximum Batch Size} field should be greater than zero	17000	The possible issues could be: • The value specified for the **Maximum Batch Count** parameter is less than or equal to zero.
C1-DELBL	101	{ Transaction Header Id } field missing	11001	The possible issues could be: • No value is specified for the **Transaction Header ID** parameter.
C1-DELBL	102	{Chunk Size} field invalid	11001	The possible issues could be: • The value specified for the **Chunk Size** parameter is less than or equal to one.
C1-DELBL	106	Value { Given Transaction Header Id } too long for field { transactionHeaderId }. Maximum length: 14. Found: { Length of given Transaction Header Id}	11001	The possible issues could be: • The value specified for the **Transaction Header ID** parameter exceeds the maximum length of 14 characters.

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Batch Name	Message Number	Error Message	Message Category	Possible Issues
C1-DELBL	1391	Bill is completed or bill segment is frozen or pending-cancelled hence can not cancel the header.	17000	The possible issues could be: • You are trying to cancel a transaction feed for which a bill with the **Pending** status is already generated in the system. This pending bill has a bill segment in either **Frozen** or **Pending Cancel** status.
C1-DELBL	1556	{Maximum Batch Size} field should be greater than zero	17000	The possible issues could be: • The value specified for the **Maximum Batch Count** parameter is less than or equal to zero.
C1-TXCNC	101	{ Transaction Header Id } field missing	11001	The possible issues could be: • No value is specified for the **Transaction Header ID** parameter.
C1-TXCNC	102	{Chunk Size} field invalid	11001	The possible issues could be: • The value specified for the **Chunk Size** parameter is less than or equal to one.
C1-TXCNC	102	{ Maximum Batch Size } field invalid	11001	The possible issues could be: • The value specified for the **Maximum Batch Count** parameter is greater than the value specified for the **Chunk Size** parameter.
C1-TXCNC	1391	Bill is completed or bill segment is frozen or pending-cancelled hence can not cancel the header.	17000	The possible issues could be: • You are trying to cancel a transaction feed for which a bill with the **Pending** status is already generated in the system. This pending bill has a bill segment in either **Frozen** or **Pending Cancel** status.
C1-TXCNC	1424	There are pending bills for the feed you want to cancel. Please execute the Pending Bill Deletion (C1-DELBL) batch.	17000	The possible issues could be: • The **Pending Bill Deletion (C1-DELBL)** batch is not yet executed to delete the bills (generated for the feed) which are in the **Pending** status.
C1-TXCNC	1556	{Maximum Batch Size} field should be greater than zero	17000	The possible issues could be: • The value specified for the **Maximum Batch Count** parameter is less than or equal to zero.
C1-DISTG	102	{Division} field invalid	11001	The possible issues could be: • Division is not defined in the system.

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Batch Name	Message Number	Error Message	Message Category	Possible Issues
C1-DISTG	102	{ Billing Cycle Code } field invalid	11001	The possible issues could be: • Bill cycle is not defined in the system.
C1-IDENT	102	{Chunk Size} field invalid	11001	The possible issues could be: • The value specified for the **Chunk Size** parameter is less than or equal to one.
C1-IDENT	1660	Disaggregate Transactions From Date would impose partial disaggregation for some billable charges	17000	The possible issues could be: • The identified aggregated billable charges aggregate transactions whose transaction date falls before the disaggregate transactions from date.
C1-DRSUA	102	{Chunk Size} field invalid	11001	The possible issues could be: • The value specified for the **Chunk Size** parameter is less than or equal to one.
C1-DRSUA	102	{Chunk Size} field invalid	11001	The possible issues could be: • The value specified for the **Chunk Size** parameter is less than or equal to one.
C1-PDTXN	102	{Chunk Size} field invalid	11001	The possible issues could be: • The value specified for the **Chunk Size** parameter is less than or equal to one.
C1-PDTXN	102	{ Maximum Batch Size } field invalid	11001	The possible issues could be: • The value specified for the **Maximum Batch Count** parameter is greater than the value specified for the **Chunk Size** parameter.
C1-PDTXN	1556	{Maximum Batch Size} field should be greater than zero	17000	The possible issues could be: • The value specified for the **Maximum Batch Count** parameter is less than or equal to zero.

Alert Notification for Transaction Feed Management

Oracle Revenue Management and Billing enables you to configure alert notification for the **Transaction Feed Management** feature. At present, the system supports the following two alert notifications:

- To Do Creation
- Email Notification

The objective of these notifications is to create an alert for the records which are in the **Ignored** or **Error** status. Once a To Do is created, it indicates the number of records which are in the **Ignored** or **Error** status. However, the email notification provides the error summary statistics.

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A new batch named **C1-ERRAL** is introduced in this release. While executing the **C1-ERRAL** batch, you need to set the **To Do Created For** parameter to **TFM**. In addition, you need to specify the transaction status (for example, EROR or IGNR) for which you want to create an alert notification. On executing the **C1-ERRAL** batch, the system creates a To Do using the **C1-TXNER** To Do type.

The **C1-ERRAL** batch must be executed only after all the transaction feed management batches are executed successfully. If the **C1-ERRAL** batch is executed for the first time, the system considers all the transactions whose **CURR_SYS_PRS_DT** is earlier than or equal to the batch business date. However, in the subsequent execution, the system considers only those transactions whose **CURR_SYS_PRS_DT** is later than the last To Do generation date and earlier than or equal to the batch business date.

On clicking the To Do notification in the **To Do List** screen, you can view the error records in the **Feed Management Dashboard** screen. Note that the system will not create a new To Do when the To Do for the same drill key combination already exists in the **Open** status.

To create an email notification, you need to attach an algorithm which is created using the **C1-TFMERREML** algorithm type to the **To Do Post-Processing** system event of the **C1-TXNER** To Do type. On creating a To Do, the batch creates an email outbound message which contains the error summary statistics.

Feed Management Dashboard

The **Feed Management Dashboard** screen allows you to view the details of a transaction feed. It allows you to drill down and view:

- Transaction volume details of a feed at the division level
- Transactions in a feed which belong to a division
- Legs of a transaction
- SQIs which are associated with the price item-division combination to which a transaction is mapped
- Calculation lines generated for a transaction leg
- Characteristics of each calculation line

The **Feed Management Dashboard** screen contains the following zones:

- Search on page 1228
- Division Level Information on page 1234
- Transaction Level Information on page 1235
- Transaction Leg Information on page 1237
- Transaction Leg Service Quantity on page 1238
- Transaction Leg Calculation Lines on page 1238
- Transaction Leg Calc Line Characteristics on page 1240

Search

The **Search** zone allows you to search for a transaction feed using various search criteria. It also allows you to view the details of a transaction feed which is already uploaded in the system. It contains the following two sections:

- **Search Criteria** - The **Search Criteria** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Search By	Used to indicate whether you want to search for the transaction volume details of a feed at	Yes (Conditional)

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Field Name	Field Description	Mandatory (Yes or No)
	the division level or transaction level. The valid values are: • **Feed Level Details** - Used to indicate that you want to search for the transaction volume details of a feed at the division level. • **Transaction Level Details** - Used to indicate that you want to search for the transaction volume details of a feed at the transaction level. **Note:** By default, the **Feed Level Details** option is selected.	**Note:** This field is required for searching the transaction volume details at the division or transaction level.
Feed Header Date From	Used to search for transaction feeds having header date later than or equal to the specified date.	No
Transaction Source	Used to search for transaction feeds received from a particular transaction source.	No
Feed Header Date To	Used to search for transaction feeds having header date earlier than or equal to the specified date.	No
File Name	Used to search for a transaction feed based on the file name.	No
Feed Load Date From	Used to search for transaction feeds which are uploaded on or later than the specified date.	No
Transaction Header ID	Used to search for a transaction feed based on the header ID.	No
Feed Load Date To	Used to search for transaction feeds which are uploaded on or earlier than the specified date.	No
Account Identifier Type	Used to indicate the identifier type based on which you want to search transaction feed details of an account. **Note:** This field appears when you select the **Transaction Level Details** option from the **Search By** field.	Yes (Conditional) **Note:** If you enter the primary account identifier as a search criteria, you have to select the account identifier type.
Primary Account Identifier	Used to search transaction feed for a particular account. **Note:** This field appears when you select the **Transaction Level Details** option from the **Search By** field.	Yes (Conditional) **Note:** If you select the account identifier type as a search criteria, you have to enter the primary account identifier.
Transaction Record Type	Used to search transaction feeds for transactions with a particular record type.	No

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Field Name	Field Description	Mandatory (Yes or No)
	Note: This field appears when you select the **Transaction Level Details** option from the **Search By** field.	
Transaction Source	Used to search transaction feeds received from a particular transaction source. **Note:** This field appears when you select the **Transaction Level Details** option from the **Search By** field.	No
Transaction ID	Used to search for a particular transaction feed. **Note:** This field appears when you select the **Transaction Level Details** option from the **Search By** field.	No
Transaction Date From	Used to search transaction feeds for transactions which are performed on or later than the specified date. **Note:** This field appears when you select the **Transaction Level Details** option from the **Search By** field.	Yes (Conditional) **Note:** This field is required while searching for transactions which are in the **Error** status.
External Reference Number	Used to search transaction feed with a particular external reference number. **Note:** This field appears when you select the **Transaction Level Details** option from the **Search By** field.	No
Transaction Date To	Used to search transaction feeds for transactions which are performed on or earlier than the specified date. **Note:** This field appears when you select the **Transaction Level Details** option from the **Search By** field. If you do not specify the date in the **Transaction Date To** field, the system by default sets it to the system date.	No
Transaction Status	Used to search transaction feeds for transactions which are in a particular status. The valid values are: • Cancelled • Completed • Error • Ignored	No

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Field Name	Field Description	Mandatory (Yes or No)
	• Initial Product Derived • Invalid • Uploaded **Note:** This field appears when you select the **Transaction Level Details** option from the **Search By** field.	
Division	Used to search transaction feeds that belong to a particular division. **Note:** This field appears when you select the **Transaction Level Details** option from the **Search By** field. You can view only those divisions to which you have access in the **Division** list.	No
Error Code/Message	Used to search transaction feeds for transactions which are in the **Error** status and with a particular error message or error code. **Note:** This field appears when you select the **Transaction Level Details** option from the **Search By** field.	No
Error Category	Used to search transaction feeds for transactions which are in the **Error** status and which belong to a particular error category. **Note:** This field appears when you select the **Transaction Level Details** option from the **Search By** field.	No

Note: You must specify at least one search criterion while searching for a transaction feed.

- **Search Results** - On clicking the **Search** button, the search results appear based on the specified search criteria. The **Search Results** section contains the following columns:

Column Name	Column Description
File Name	Displays the name of the file from where the transaction feed is uploaded.
Transaction Source	Displays the transaction source from where the transaction feed is received.
Transaction Header ID	Displays the transaction header ID. **Note:** The transaction header ID is generated automatically when the file is uploaded.
Transaction Header External ID	Displays the ID mentioned in the file header.
Feed Header Date	Displays the date mentioned in the file header.

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Column Name	Column Description
Feed Load Date	Displays the date when the transaction feed was uploaded in the system.
Feed Status	Displays the status of the transaction feed. The valid values are: • **Uploaded** - Indicates that the transaction feed is uploaded. • **Validated** - Indicates that the file header is validated. • **Cancelled** - Indicates that the transaction feed is cancelled. • **Invalid** - Indicates that the file header validation failed.
Error Message	Indicates the reason why the file header validation failed.
Total Volume	Displays the total transaction volume of the feed.
Total Amount	Displays the total amount of the transaction feeds.
Uploaded	Displays the total transactions which are uploaded in the system.
Price Item	Displays the total transactions which are validated and for which price items are determined in the system.
Completed	Displays the total transactions for which the billable charges are created and completed in the system.
Error Message	Displays the total transactions which could not pass through the validation, price item determination, or billable charge creation process. **Note:** If a transaction has only one transaction leg, the error message is displayed from the **CI_TXN_DETAIL_EXCP** table instead of the **CI_TXN_DETAIL** table. The objective is that the user should be able to view the transaction leg level error instead of the transaction level error.
Cancelled	Displays the total transactions which are cancelled in the system.
Ignored	Displays the total transactions which are ignored in the system.
Invalid	Displays the total transactions which are invalid.
Transactions Archived	Displays the total transaction volume which is archived in the system.
Transaction ID	Displays the transaction record number for which the transaction information is saved in the system. **Note:** This column appears when you select the **Transaction Level Details** option from the **Search By** field.
External Reference Number	Displays the external reference number of the transaction. **Note:** This column appears when you select the **Transaction Level Details** option from the **Search By** field.
Division	Indicates the division to which the transaction belongs. **Note:** This column appears when you select the **Transaction Level Details** option from the **Search By** field.
Transaction Record Type	Displays the record type of the transaction.

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Column Name	Column Description
	Note: This column appears when you select the **Transaction Level Details** option from the **Search By** field.
Transaction Date	Displays the date when the transaction is performed.
	Note: This column appears when you select the **Transaction Level Details** option from the **Search By** field.
Processing Date	Displays the date when the transaction is processed in the system.
	Note: This column appears when you select the **Transaction Level Details** option from the **Search By** field.
Account Information	Displays the concatenated string of information about the account for which the transaction is performed separated by a comma (,).
	Note: It has a link. On clicking the link, the **Account** screen appears where you can view the details of the respective account. This column appears when you select the **Transaction Level Details** option from the **Search By** field.
Account Identifier Type	Indicates the identifier type based on which the transaction is created for the account.
	Note: This column appears when you select the **Transaction Level Details** option from the **Search By** field.
Primary Account Identifier	Indicates the account for which the transaction is performed.
	Note: This column appears when you select the **Transaction Level Details** option from the **Search By** field.
Transaction Volume	Displays the total transaction volume of the account.
	Note: This column appears when you select the **Transaction Level Details** option from the **Search By** field.
Transaction Amount	Displays the total transaction amount of the account.
	Note: This column appears when you select the **Transaction Level Details** option from the **Search By** field.
Credit/Debit Indicator	Indicates whether the transaction is a debit or credit transaction.
	Note: This column appears when you select the **Transaction Level Details** option from the **Search By** field.
Customer Reference Number	Indicates the customer who has performed the transaction.
	Note: This column appears when you select the **Transaction Level Details** option from the **Search By** field.

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Column Name	Column Description
Transaction Status	Indicates the status of the transaction. **Note:** This column appears when you select the **Transaction Level Details** option from the **Search By** field.
Rule	Indicates the rule which was met while determining the initial price item for the transaction. **Note:** It has a link. On clicking the link, the **Rule** window appears where you can view the details of the rule that was applied while determining the initial price item for the transaction. This column appears when you select the **Transaction Level Details** option from the **Search By** field.
Transaction Information	Displays the concatenated string of information about the transaction separated by a comma (,). **Note:** It has a link. On clicking the link, the **Transaction Detail View** window appears where you can view the details of the respective transaction. This column appears when you select the **Transaction Level Details** option from the **Search By** field.

Note: Pagination is used to display limited number of records in the **Search Results** section. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

On clicking the **Broadcast** (ᯤ) icon corresponding to the transaction feed in the **Search Results** section, the **Division Level Information** zone or the **Transaction Leg Information** zone appears depending on whether you select the **Feed Level Details** or the **Transaction Level Details** option from the **Search By** field respectively.

Related Topics

For more information on...	See...
How to search for a transaction feed	Searching for a Transaction Feed on page 1240
Division Level Information zone	Division Level Information on page 1234
Transaction Leg Information zone	Transaction Leg Information on page 1237

Division Level Information

The **Division Level Information** zone allows you to drill down and view the transaction volume details of a feed at the division level. It contains the following two sections:

- **Search Criteria** - The **Search Criteria** section contains the following field:

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Field Name	Field Description	Mandatory (Yes or No)
Division	Used when you want to view the transaction volume details of a particular division received through the feed. **Note:** You can only view those divisions to which you have access in the **Division** list.	No

- **Search Results** - On clicking the **Search** button, the search results are filtered based on the specified search criteria. The **Search Results** section contains the following columns:

Column Name	Column Description
Division	Indicates the division.
Total Volume	Displays the total transaction volume of the division.
Uploaded Volume	Displays the total transaction volume (of the division) which is uploaded in the system.
Price Item Determined	Displays the total transaction volume (of the division) which is validated and for which price item is determined in the system.
Completed Volume	Displays the total transaction volume (of the division) for which billable charges are created and completed in the system.
Error Volume	Displays the total transaction volume (of the division) which could not pass through the validation, price item determination, or billable charge creation process.
Cancelled Volume	Displays the total transaction volume (of the division) which is cancelled in the system.
Ignored Volume	Displays the total transaction volume (of the division) which is ignored in the system.
Invalid Volume	Displays the total transaction volume (of the division) which is invalid.

By default, the **Division Level Information** zone does not appear in the **Feed Management Dashboard** screen. It appears when you select the **Feed Level Details** option from the **Search By** field and click the **Broadcast** (((•))) icon corresponding to the transaction feed in the **Search Results** section of the **Search** zone.

Related Topics

For more information on...	See...
How to view the division level details of a transaction feed	Viewing Division Level Details of a Transaction Feed on page 1241

Transaction Level Information

The **Transaction Level Information** zone lists the transactions in a feed which belong to a particular division. It contains the following columns:

Column Name	Column Description
Transaction ID	Displays the transaction ID.
External Reference Number	Displays the external reference number of the transaction.

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Column Name	Column Description
Division	Indicates the division to which the transaction belongs.
Transaction Record Type	Displays the record type of the transaction.
Transaction Date	Displays the date when the transaction was performed.
Account Information	Displays the account for which the transaction is performed. **Note:** It has a link. On clicking the link, the **Account** screens appears where you can view the details of the respective account.
Account Identifier Type	Displays the type of account identifier.
Account Identifier	Indicates the account for which the transaction is performed.
Transaction Volume	Displays the transaction volume.
Transaction Amount	Displays the transaction amount.
Credit/Debit Indicator	Indicates whether the transaction is a debit or credit transaction.
Customer Reference Number	Indicates the customer who performed the transaction.
Transaction Status	Indicates the status of the transaction.
Error Message	Indicates the reason why the validation, price item determination, or billable charge creation process failed.
Rule	Indicates the rule which was met while determining initial price item for the transaction. **Note:** It has a link. On clicking the link, the **Rule** screen appears where you can view the details of the respective rule.
Transaction Information	Displays additional information about the transaction. **Note:** It has a link. On clicking the link, the **Transaction Details** screen appears where you can view the details of the respective transaction.

By default, the **Transaction Level Information** zone does not appear in the **Feed Management Dashboard** screen. It appears only when you click the **Broadcast** (📡) icon corresponding to a division in the **Division Level Information** zone.

On clicking the **Broadcast** (📡) icon corresponding to a transaction, the **Transaction Leg Information** zone appears where you can view a list of transaction legs of a particular transaction.

You can filter the list using various search criteria (such as, **External Reference Number**, **Primary Account Identifier**, **Account Identifier Type**, **Transaction Source**, **Transaction Record Type**, and **Transaction Status**) available in the **Filter** area. By default, the **Filter** area is hidden. You can view the **Filter** area by clicking the **Filters** (▽) icon available in the upper right corner of this zone.

Related Topics

For more information on...	See...
How to view the transaction details of a division	Viewing Transactions that Belong to a Division on page 1241
Feed Management Dashboard screen	Feed Management Dashboard on page 1228
Transaction Leg Information zone	Transaction Leg Information on page 1237

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Transaction Leg Information

The **Transaction Leg Information** zone lists the legs of a transaction. It contains the following columns:

Column Name	Column Description
Transaction ID	Indicates the transaction to which the transaction leg belongs.
Display Sequence	Displays the sequence number of transaction leg.
Account Identifier Type	Indicates the type of account identifier to which the transaction is mapped.
Primary Account Identifier	Indicates the account which will bear the charges for the transaction.
Error Message	Indicates the reason why the validation, price item determination, or billable charge creation process failed.
Price Item	Indicates the price item to which the transaction is mapped. **Note:** It has a link. On clicking the link, the Price Item screen appears where you can view the details of the respective price item.
Billable Charge ID	Indicates the billable charge which is created for the transaction leg. **Note:** The data appears in this column when the billable charge is created for the transaction leg. It has a link. On clicking the link, the **Billable Charge** screen appears where you can view the details of the billable charge.
Transaction Calculation ID	Displays the transaction calculation ID. **Note:** The data appears in this column when the transaction leg is rated before billing.
Initial Price Item Code	Indicates the initial price item to which the transaction was mapped.
Bill ID	Indicates the bill in which the transaction leg of the billable charge is included for billing.
Bill Segment ID	Indicates the bill segment to which the bill belongs.
Variance	Indicates the variance parameter which is used along with the price item for determining price item pricing. **Note:** This column appears when the **Multi Price Parameter** option type of the **Multi Parameter Based Pricing (C1_PPARM_FLG)** feature configuration is set to **False**.
Price Item Parameters	Displays a comma-separated list of parameter values. It indicates the price item parameters and their values which are used along with the price item for determining price item pricing. **Note:** This column appears when the **Multi Price Parameter** option type of the **Multi Parameter Based Pricing (C1_PPARM_FLG)** feature configuration is set to **True**.

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Column Name	Column Description
Aggregation Parameter Group ID	Indicates the aggregation parameter group using which the transaction leg is aggregated in the billable charge.

Note: Pagination is used to display limited number of records in this zone. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

By default, the **Transaction Leg Information** zone does not appear in the **Feed Management Dashboard** screen. It appears when you click the **Broadcast** (📡) icon corresponding to a transaction in the **Transaction Level Information** zone.

Related Topics

For more information on...	See...
How to view the legs of a transaction	Viewing Legs of a Transaction on page 1242
Feed Management Dashboard screen	Feed Management Dashboard on page 1228
Transaction Level Information zone	Transaction Level Information on page 1235

Transaction Leg Service Quantity

The **Transaction Leg Service Quantity** zone lists the SQIs which are associated with the price item-division combination to which a transaction is mapped. It contains the following columns:

Column Name	Column Description
SQI	Indicates the service quantity identifier.
Daily Service Quantity	Displays the SQI value which is calculated using the transaction aggregation rule defined for the price item-division combination.

Note: Pagination is used to display limited number of records in this zone. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

By default, the **Transaction Leg Service Quantity** zone does not appear in the **Feed Management Dashboard** screen. It appears when you click the **Broadcast** (📡) icon corresponding to a transaction leg, which is rated before billing, in the **Transaction Leg Information** zone.

Related Topics

For more information on...	See...
How to view the SQIs calculated for a transaction leg	Viewing the SQIs Calculated for a Transaction Leg on page 1242
Feed Management Dashboard screen	Feed Management Dashboard on page 1228
Transaction Leg Information zone	Transaction Leg Information on page 1237

Transaction Leg Calculation Lines

During the pass through charge calculation, a calculation line is created for each rate component. The **Transaction Leg Calculation Lines** zone lists the calculation lines created for a transaction leg. It contains the following columns:

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Column Name	Column Description
Transaction Calculation ID	Displays the transaction calculation ID.
Sequence	Indicates the sequence in which the calculation line is created. It is the sequence of the rate component which is used in the rate schedule.
Price Component ID	Indicates the price component which is used during calculation.
Rate Information	Displays the rate which is used for calculation.
SQI	Indicates the service quantity identifier.
Billable Service Quantity	Displays the SQI value used by the rates engine for calculation.
Calculated Amount	Displays the calculated charge amount which is rounded off. This amount appears in the invoice currency.
Description on Bill	Displays the summarized information about the calculation line that will be printed on the bill.
Precise Calculated Amount	Displays the calculated charge amount. This amount appears in the invoice currency.
Exempt Amount	Displays the amount of the calculated charge that the person does not have to pay due to tax exemption.
Base Amount	Displays the total amount derived from the cross-referenced line(s) that the current line is then used to calculate the charge amount.
Pricing Amount	Displays the calculated charge amount. This amount appears in the pricing currency.
Exchange Rate	Indicates the exchange rate which is used when the invoice currency is different from the pricing currency.
Print	Indicates whether information about the calculation line must be printed on the person's bill. The valid values are: • Y • N
Distribution Code	Indicates the distribution code associated with the rate component.
Pricing Currency	Indicates the currency in which the price item pricing is defined.
Aggregation Parameter Group ID	Indicates the aggregation parameter group using which the transaction leg is aggregated in the billable charge.

Note: Pagination is used to display limited number of records in this zone. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

By default, the **Transaction Leg Calculation Lines** zone does not appear in the **Feed Management Dashboard** screen. It appears when you click the **Broadcast** (📡) icon corresponding to a transaction leg, which is rated before billing, in the **Transaction Leg Information** zone.

Related Topics

For more information on...	See...
How to view the calculation lines of a transaction leg	Viewing the Calculation Lines of a Transaction Leg on page 1243
Feed Management Dashboard screen	Feed Management Dashboard on page 1228
Transaction Leg Information zone	Transaction Leg Information on page 1237

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Transaction Leg Calc Line Characteristics

The **Transaction Leg Calc Line Characteristics** zone lists the characteristics of each calculation line. It contains the following columns:

Column Name	Column Description
Transaction Calculation ID	Displays the transaction calculation ID.
Sequence	Indicates the sequence in which the calculation line was created. It is the sequence of the rate component which is used in the rate schedule.
Characteristic Type	Indicates the characteristic type.
Characteristic Value	Displays the value of the characteristic type.

Note: Pagination is used to display limited number of records in this zone. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

By default, the **Transaction Leg Calc Line Characteristics** zone does not appear in the **Feed Management Dashboard** screen. It appears when you click the **Broadcast** (ᯤ) icon corresponding to a transaction leg, which is rated before billing, in the **Transaction Leg Information** zone.

Related Topics

For more information on...	See...
How to view characteristics of a calculation line	Viewing Characteristics of a Calculation Line on page 1243
Feed Management Dashboard screen	Feed Management Dashboard on page 1228
Transaction Leg Information zone	Transaction Leg Information on page 1237

Searching for a Transaction Feed

Procedure

To search for a transaction feed:

1. Click the **Menu** link in the **Application** toolbar.
   A list appears.
2. From the **Main** menu, select **Transaction and Audit Event Management** and then click **Feed Management Dashboard**.
   The **Feed Management Dashboard** screen appears.
3. Enter the search criteria in the **Search** zone.

   Note: ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.
4. Click **Search**.
   A list of transaction feeds that meet the search criteria appears in the **Search Results** section.

Related Topics

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For more information on...	See...
Feed Management Dashboard screen	Feed Management Dashboard on page 1228
Search zone	Search on page 1228

Viewing Division Level Details of a Transaction Feed

Procedure

To view the division level details of a transaction feed:

1. Ensure that the **Feed Level Details** option is selected from the **Search By** field in the **Search** zone of the **Feed Management Dashboard** screen for viewing the division level details of a transaction feed.
2. Click **Search**.
   The search results appear based on the specified search criteria.
3. In the **Search Results** section, click the **Broadcast** (📡) icon corresponding to the transaction feed whose *d*ivision level details you want to view.
   The **Division Level Information** zone appears.
4. View the transaction volume details of each division in the **Division Level Information** zone.

Related Topics

For more information on...	See...
How to search for a transaction feed	Searching for a Transaction Feed on page 1240
Search zone	Search on page 1228
Feed Management Dashboard screen	Feed Management Dashboard on page 1228
Division Level Information zone	Division Level Information on page 1234

Viewing Transactions that Belong to a Division

Procedure

To view the transactions that belong to a division:

1. Ensure that the **Feed Level Details** option is selected from the **Search By** field in the **Search** zone of the **Feed Management Dashboard** screen for viewing the transactions that belong to a division.
2. Click **Search**.
   The search results appear based on the specified search criteria.
3. In the **Search Results** section, click the **Broadcast** (📡) icon corresponding to the transaction feed whose *d*etails you want to view.
   The **Division Level Information** zone appears.
4. Click the **Broadcast** (📡) icon corresponding to the division whose transaction details you want to view.
   The **Transaction Level Information** zone appears.
5. View the list of the transactions that belong to the division in the **Transaction Level Information** zone.

Related Topics

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For more information on...	See...
How to search for a transaction feed	Searching for a Transaction Feed on page 1240
Search zone	Search on page 1228
Feed Management Dashboard screen	Feed Management Dashboard on page 1228
Division Level Information zone	Division Level Information on page 1234
Transaction Level Information zone	Transaction Level Information on page 1235

Viewing Legs of a Transaction

Procedure

To view the legs of a transaction:

1. Search for the transaction feed in the **Feed Management Dashboard** screen.

   Note: Ensure that the **Transaction Level Information** zone is expanded in the **Feed Management Dashboard** screen while you are viewing the division level details of a transaction feed.

2. In the **Search Results** section or the **Transaction Level Information** zone, click the **Broadcast** (ᯤ) icon corresponding to the transaction feed whose *d*etails you want to view.
   The **Transaction Leg Information** zone appears.
3. View the details of transaction legs in the **Transaction Leg Information** zone.

Related Topics

For more information on...	See...
How to search for a transaction feed	Searching for a Transaction Feed on page 1240
Feed Management Dashboard screen	Feed Management Dashboard on page 1228
Transaction Level Information zone	Transaction Level Information on page 1235
Transaction Leg Information zone	Transaction Leg Information on page 1237

Viewing the SQIs Calculated for a Transaction Leg

Procedure

To view the SQIs calculated for a transaction leg:

1. Ensure that the **Transaction Leg Information** zone is expanded in the **Feed Management Dashboard** screen.
2. Click the **Broadcast** (ᯤ) icon corresponding to the transaction leg (which is rated before billing) whose SQIs *y*ou want to view.

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The **Transaction Leg Service Quantity**, **Transaction Leg Calculation Lines**, and **Transaction Leg Calc Line Characteristics** zones appear.

3. View the SQIs calculated for the transaction leg in the **Transaction Leg Service Quantity** zone.

Related Topics

For more information on...	See...
How to search for a transaction feed	Searching for a Transaction Feed on page 1240
Transaction Leg Information zone	Transaction Leg Information on page 1237
Feed Management Dashboard screen	Feed Management Dashboard on page 1228
Transaction Leg Service Quantity zone	Transaction Leg Service Quantity on page 1238
Transaction Leg Calculation Lines zone	Transaction Leg Calculation Lines on page 1238
Transaction Leg Calc Line Characteristics zone	Transaction Leg Calc Line Characteristics on page 1240

Viewing the Calculation Lines of a Transaction Leg

Procedure

To view the calculation lines of a transaction leg:

1. Ensure that the **Transaction Leg Information** zone is expanded in the **Feed Management Dashboard** screen.
2. Click the **Broadcast** (ᯤ) icon corresponding to the transaction leg (which is rated before billing) whose calculation lines you want to view.
   The **Transaction Leg Service Quantity**, **Transaction Leg Calculation Lines**, and **Transaction Leg Calc Line Characteristics** zones appear.
3. View the list of calculation lines generated for the transaction leg in the **Transaction Leg Calculation Lines** zone.

Related Topics

For more information on...	See...
How to search for a transaction feed	Searching for a Transaction Feed on page 1240
Transaction Leg Information zone	Transaction Leg Information on page 1237
Feed Management Dashboard screen	Feed Management Dashboard on page 1228
Transaction Leg Service Quantity zone	Transaction Leg Service Quantity on page 1238
Transaction Leg Calculation Lines zone	Transaction Leg Calculation Lines on page 1238
Transaction Leg Calc Line Characteristics zone	Transaction Leg Calc Line Characteristics on page 1240

Viewing Characteristics of a Calculation Line

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Procedure

To view the characteristics of a calculation line:

1. Ensure that the **Transaction Leg Information** zone is expanded in the **Feed Management Dashboard** screen.
2. Click the **Broadcast** (ᯤ) icon corresponding to the transaction leg (which is rated before billing) whose *c*alculation line characteristics you want to view.
   The **Transaction Leg Service Quantity**, **Transaction Leg Calculation Lines**, and **Transaction Leg Calc Line Characteristics** zones appear.
3. View the characteristics of each calculation line in the **Transaction Leg Calc Line Characteristics** *z*one.

Related Topics

For more information on...	**See...**
How to search for a transaction feed	Searching for a Transaction Feed on page 1240
Transaction Leg Information zone	Transaction Leg Information on page 1237
Feed Management Dashboard screen	Feed Management Dashboard on page 1228
Transaction Leg Service Quantity zone	Transaction Leg Service Quantity on page 1238
Transaction Leg Calculation Lines zone	Transaction Leg Calculation Lines on page 1238
Transaction Leg Calc Line Characteristics zone	Transaction Leg Calc Line Characteristics on page 1240

Transaction Details

The **Transaction Details** screen allows you to search for a transaction using various search criteria. It also allows you to add and copy an existing transaction. It contains the following zones:

- Search on page 1244
- Transaction Legs on page 1248
- Transaction Error Messages on page 1250

Search

The **Search** zone allows you to search for a transaction using various search criteria. It contains the following two sections:

- **Search Criteria** - The **Search Criteria** section contains the following fields:

Field Name	**Field Description**	**Mandatory (Yes or No)**
Search By	Used to indicate whether you want to search transactions based on their current status. The valid values are: • **Uploaded** - Used to search transactions which are uploaded in the system. • **Initial Price Item Determined** - Used to search transactions for which a price item is determined. • **Ignored** - Used to search transactions which are ignored in the system.	Yes (Conditional) **Note:** This field is required for searching transactions which are in a particular status.

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Field Name	Field Description	Mandatory (Yes or No)
	• **Error** - Used to search transactions with an error. • **Cancelled** - Used to search for transactions which are cancelled. • **Completed** - Used to search for transactions whose billable charge is completed. • **Invalid** - Used to search for invalid transactions. **Note:** By default the **Uploaded** option is selected.	
External Reference Number	Used to search a transaction with a particular external reference number.	No
Division	Used to search transactions that belong to a particular division. **Note:** You can only view those divisions to which you have access in the **Division** list.	No
Transaction Source	Used to search transactions received from a particular transaction source.	No
Transaction Record Type	Used to search transactions with a particular record type.	No
Account Identifier Type	Used to select the identifier type based on which you want to search transactions of an account.	Yes (Conditional) **Note:** If you enter the primary account identifier as a search criteria, you have to select the account identifier type.
Primary Account Identifier	Used to search transactions which are performed for a particular account.	Yes (Conditional) **Note:** If you select the account identifier type as a search criteria, you have to enter the primary account identifier.
Transaction Date	Used to search transactions which are performed on a particular date.	No
Transaction Upload Date	Used to search transactions which are uploaded in the system on a particular date.	No
Transaction Header ID	Used to search transactions which are uploaded through a particular transaction feed. **Note:** This field appears when you select the **Uploaded**, **Ignored**, **Error**, **Cancelled**, or **Invalid** options from the **Search By** field.	No
Price Item	Used to search transactions which are mapped to a particular price item.	No

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Field Name	Field Description	Mandatory (Yes or No)
	Note: This field appears when you select the **Initial Price Item Determined** option from the **Search By** field.	
Billable Charge ID	Used to search transactions which are included in a particular billable charge. **Note:** This field appears when you select the **Completed** option from the **Search By** field.	No
Disaggregated	Used to indicate whether you want to search transactions which are disaggregated. The valid values are: • Yes • No	No

Note: You must specify at least one search criterion while searching for a transaction.

- **Search Results** - On clicking the **Search** button, the search results appear based on the specified search criteria. The **Search Results** section contains the following columns:

Column Name	Column Description
Transaction ID	Displays the transaction ID. **Note:** It has a link. On clicking the link, the **Transaction Detail View** screen appears where you can view the details of the respective transaction.
Transaction Source	Displays the transaction source from where the transaction is received.
Transaction Record Type	Displays the record type of the transaction.
Transaction Upload Date	Displays the date when the transaction is uploaded in the system. **Note:** This column appears when you select the **Uploaded**, **Initial Price Item Determined**, **Ignored**, **Error**, **Cancelled**, or **Invalid** options from the **Search By** list.
Transaction Header ID	Indicates the transaction feed through which the transaction was uploaded in the system. **Note:** This column appears when you select the **Uploaded**, **Ignored**, **Cancelled**, or **Invalid** options from the **Search By** list.
External Reference Number	Displays the external reference number of the transaction.
Customer Reference Number	Displays the reference number of the customer for the particular transaction. **Note:** This column appears when you select the **Error** option from the **Search By** field.
Disaggregation Status	Indicates whether the transaction was disaggregated or not. The valid values are: • Yes

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Column Name	Column Description
	• No
Manual Entry	Indicates whether the transaction is manually added in the system. The valid values are: • Yes • No
	Note: This column appears when you select the **Uploaded** or **Cancelled** options from the **Search By** list.
Transaction Date	Displays the date when the transaction was performed.
Transaction Amount	Displays the transaction amount.
Transaction Volume	Displays the transaction volume.
Division	Indicates the division to which the transaction belongs.
Error Message	Displays the reason why the validation, price item determination, or billable charge creation process failed.
	Note: This column appears when you select the **Error**, or **Invalid** options from the **Search By** list.
Account Information	Displays the concatenated string of information about the account for which the transaction is performed separated by a comma (,). The string includes the account identifier type and account identifier.
Rule	Indicates the rule which was met while determining initial price item for the transaction.
	Note: It has a link. On clicking the link, the **Rule** screen appears where you can view the details of the respective rule. This column appears when you select the **Initial Price Item Determined**, **Ignored**, **Error**, or **Completed** options from the **Search By** list.
Transaction Information	Displays additional information about the transaction.
	Note: It has a link. On clicking the link, the **Transaction Detail View** screen appears where you can view the details of the respective transaction.

Note: Pagination is used to display limited number of records in the **Search Results** section. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

On clicking the **Broadcast** (ᯤ) icon corresponding to a transaction in the **Search Results** section, the **Transaction Legs** or the **Transaction Error Messages** zone appears based on the status of the transaction.

Note: The **Broadcast** (ᯤ) icon does not appear for transactions which are in the **Cancelled** status.

Related Topics

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For more information on...	See...
How to search for a transaction	Searching for a Transaction on page 1251
How to copy a transaction	Adding a Transaction on page 1253
How to view the details of a transaction	Viewing the Transaction Details on page 1252
Transaction Legs zone	Transaction Legs on page 1248
Transaction Error Messages zone	Transaction Error Messages on page 1250

Transaction Legs

The **Transaction Legs** zone allows you to view the legs of a transaction. It contains the following columns:

Column Name	Column Description
Transaction ID	Indicates the transaction to which the transaction leg belongs.
Transaction Leg Status	Indicates the status of the transaction leg. The valid values are: • Uploaded • Initial Price Item Derived • Ignored • Error • Cancelled • Completed • Invalid **Note:** This column appears only when you select the **Initial Price Item Determined**, **Ignored**, or **Completed** options from the **Search By** list.
Initial Price Item Code	Indicates the initial price item to which the transaction is mapped. **Note:** This column appears only when you select the **Initial Price Item Determined**, **Ignored**, or **Completed** options from the **Search By** list.
Price Item Parameters	Displays a comma-separated list of parameter values. It indicates the price item parameters and their values which are used along with the final price item for determining price item pricing. **Note:** This column appears only when you select the **Initial Price Item Determined**, **Ignored**, or **Completed** options from the **Search By** list and when the **Multi Price Parameter** option type of the **Multi Parameter Based Pricing (C1_PPARM_FLG)** feature configuration is set to **True**.
Final Price Item Code	Indicates the final price item to which the transaction is mapped. **Note:** This column appears only when you select the **Initial Price Item Determined**, **Ignored**, or **Completed** options from the **Search By** list.
Pricing Rule Information	**Note:** This column appears only when you select the **Initial Price Item Determined** option from the **Search By** list and when the transaction is uploaded for the health care domain.

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Column Name	Column Description
Price Assignment ID	Indicates the effective pricing which is available for the account, price item or regular bundle (to which the price item belongs) or parent (regular) bundle (to which the regular bundle belongs) and/or variance parameter or price item parameters (parameter group) combination on the processing date. **Note:** This column appears only when you select the **Initial Price Item Determined**, **Ignored**, or **Completed** options from the **Search By** list.
Aggregate Transaction	Indicates whether the transaction leg is aggregated. The valid values are: • Yes • No **Note:** This column appears only when you select the **Initial Price Item Determined**, **Ignored**, or **Completed** options from the **Search By** list.
Billable Charge ID	Indicates the billable charge in which the transaction leg is included for billing. **Note:** This column appears only when you select the **Initial Price Item Determined**, **Ignored**, or **Completed** options from the **Search By** list.
Transaction Source	Displays the transaction source from where the transaction is received.
Transaction Record Type	Displays the record type of the transaction.
Transaction Upload Date	Displays the date when the transaction is uploaded in the system.
External Reference Number	Displays the external reference number of the transaction.
Customer Reference Number	Displays the reference number using which the error message is created for the transaction performed by particular customer. **Note:** This column appears only when you select the **Error** option from the **Search By** list.
Disaggregation Status	Indicates whether the transaction is disaggregated or not. The valid values are: • Yes • No
Transaction Date	Displays the date when the transaction is performed.
Transaction Amount	Displays the transaction amount.
Transaction Volume	Displays the total transaction volume.
Division	Indicates the division to which the derived account belongs. The derived account means the account which will bear the charges for the transaction.
Sequence	Displays the sequence number of the transaction leg. **Note:** This column appears only when you select the **Initial Price Item Determined**, **Ignored**, or **Completed** options from the **Search By** list.
Error Message	Indicates the reason why the price item pricing verification or billable charge creation process failed.

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Column Name	Column Description
	Note: This column appears only when you select the **Initial Price Item Determined**, **Ignored**, **Error**, or **Completed** options from the **Search By** list.
Account Information	Displays the concatenated string of information about the account which bears the charges for the transaction separated by a comma (,). The string includes the account identifier type, account identifier, and division (to which the derived account belongs).
	Note: This column appears only when you select the **Initial Price Item Determined**, **Ignored**, **Error**, or **Completed** options from the **Search By** list.
Rule	Indicates the rule which was met while determining the initial price item for the transaction.
	Note: It has a link. On clicking the link, the **Rule** screen appears where you can view the details of the respective rule. This column appears only when you select the **Ignored**, **Error**, or **Completed** options from the **Search By** list and when the transaction is uploaded for the financial services domain.
Transaction Information	Displays the concatenated string of information about the transaction separated by a comma (,).
	Note: It has a link. On clicking the link, the **Transaction Detail View** screen appears where you can view the details of the respective transaction.

Note:

The **Transaction Legs** zone does not appear for transactions which are in the **Uploaded**, **Cancelled**, or **Invalid** status.

However, the **Transaction Legs** zone appears for transactions which are in the **Uploaded** status and partially disaggregated.

Related Topics

For more information on...	See...
How to search for a transaction	Searching for a Transaction on page 1251
How to view the details of a transaction	Viewing the Transaction Details on page 1252

Transaction Error Messages

The **Transaction Error Messages** zone allows you to view the reason why the transaction is in the **Error** or **Invalid** status. It contains the following column:

Column Name	Column Description
Error Message	Displays the reason why the transaction is in the **Error** or **Invalid** status.

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Note: The **Transaction Error Messages** zone appears for transactions which are in the **Invalid** status only when the errors occur while executing the **Validate Transaction and Derive Price Item (C1-TXNIP)** batch. It does not appear when the errors occur while executing the **Price Item Pricing Verification (C1-TXNVP)** or **Service Quantity Calculation (C1-TXNSQ)** batch.

Related Topics

For more information on...	See...
How to search for a transaction	Searching for a Transaction on page 1251
How to view the details of a transaction	Viewing the Transaction Details on page 1252

Searching for a Transaction

Procedure

To search for a transaction:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **T** and then click **Transaction Details**.
   The **Transaction Details** screen appears.
3. Enter the search criteria in the **Search** zone.

   Note: ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.
4. Click **Search**.

   A list of transactions that meet the search criteria appears in the **Search Results** section.

Related Topics

For more information on...	See...
Transaction Details screen	Transaction Details on page 1244
Search zone	Search on page 1244

Viewing the Transaction Legs

Procedure

To view the legs of a transaction:

1. Search for the transaction in the **Transaction Details** screen.
2. In the **Search Results** section, click the **Broadcast** (📡) icon corresponding to the transaction whose legs you *w*ant to view.

   The **Transaction Legs** zone appears.

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> **Note:**
>
> The **Broadcast** (ᯤ) icon appears corresponding to a transaction which is in the **Uploaded**, **Initial Price Item Determined**, **Ignored**, **Error**, and **Completed** status. This is because you can only view legs of an uploaded, initial price item determined, ignored, error, or completed transaction
>
> You can only view the legs of an uploaded transaction which is partially disaggregated.

3. View the details of the transaction legs in the **Transaction Legs** zone.

Related Topics

For more information on...	See...
How to search for a transaction	Searching for a Transaction on page 1251
Transaction Legs zone	Transaction Legs on page 1248

Viewing Error Messages

Procedure

To view the error messages logged for a transaction:

1. Search for the transaction which is in the **Invalid** or **Error** status in the **Transaction Details** screen.
2. In the **Search Results** section, click the **Broadcast** (ᯤ) icon corresponding to the transaction whose error *m*essages you want to view.
   The **Transaction Error Messages** zone appears.
3. View the error messages in the **Transaction Error Messages** zone.

> **Note:** The **Transaction Error Messages** zone appears for transactions which are in the **Invalid (INVL)** status only when the errors occur while executing the **Validate Transaction and Derive Price Item (C1-TXNIP)** batch. It does not appear when the errors occur while executing the **Price Item Pricing Verification (C1-TXNVP)** or **Service Quantity Calculation (C1-TXNSQ)** batch.

Related Topics

For more information on...	See...
How to search for a transaction	Searching for a Transaction on page 1251
Transaction Error Messages zone	Transaction Error Messages on page 1250

Viewing the Transaction Details

Procedure

To view the details of a transaction:

1. Search for the transaction in the **Transaction Details** screen.
2. In the **Search Results** section, click the link in the **Transaction ID** or the **Transaction Information** column corresponding to the transaction whose details you want to view.

   The **Transaction Detail View** screen appears.
3. View the details of the transaction in the **Transaction Detail View** screen.

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Related Topics

For more information on...	See...
How to search for a transaction	Searching for a Transaction on page 1251
Transaction Details screen	Transaction Details on page 1244

Adding a Transaction

Prerequisites

To add a transaction manually, you should have:

- Divisions, account identifier types, transaction sources, transaction record types, and currencies defined in the application

Procedure

To add a transaction manually:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **T** and then click **Transaction Details**.
   The **Transaction Details** screen appears.
3. Click the **Add** button in the upper right corner of the **Transaction Details** screen.

   The **Transaction Details** screen appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Transaction Source	Used to specify the transaction source from where the transaction is received.	Yes
Division	Used to specify the division to which the transaction belongs. **Note:** You can only view those divisions to which you have access in the **Division** list.	Yes
Transaction Record Type	Used to specify the record type of the transaction.	Yes
Transaction Date	Used to specify the date when the transaction is performed.	Yes
Manual Entry	Indicates that the transaction is manually entered in the system.	Not applicable
Credit/Debit Indicator	Used to indicate whether the transaction is a debit or a credit transaction.	Yes
External Reference Number	Used to specify the external reference number of the transaction.	No
Customer Reference Number	Used to indicate the person who performed the transaction.	No
Account Identifier Type	Used to specify the type of account identifier.	Yes (Conditional)

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Field Name	Field Description	Mandatory (Yes or No)
		Note: If you enter the account identifier as a search criteria, you have to select the account identifier type.
Primary Account Identifier	Used to indicate the account for which the transaction is performed.	Yes (Conditional) **Note:** If you specify the account identifier type as a search criteria, you have to enter the account identifier.
Transaction Amount	Used to specify the transaction amount.	Yes
Transaction Currency	Used to indicate the currency in which the transaction is performed.	Yes
Transaction Volume	Used to specify the transaction volume.	Yes
Additional Amount 1, Additional Amount 2, ..., Additional Amount 10 **Note:** If the business label is defined for any of these user defined fields, the business label appears instead of the field name.	Used to specify additional information about the transaction. **Note:** These fields appear when you select the transaction source and record type from the respective list.	Yes (Conditional) **Note:** This field is required when you are specifying the currency in the corresponding field.
Amount 1 Currency Code, Amount 2 Currency Code, ..., Amount 10 Currency Code **Note:** If the business label is defined for any of these user defined fields, the business label appears instead of the field name.	Used to specify additional information about the transaction. **Note:** These fields appear when you select the transaction source and record type from the respective list.	Yes (Conditional) **Note:** This field is required when you are specifying the amount in the corresponding field.
Additional Date 1, Additional Date 2, ..., Additional Date 5 **Note:** If the business label is defined for any of these user defined fields, the business label appears instead of the field name.	Used to specify additional information about the transaction. **Note:** These fields appear when you select the transaction source and record type from the respective list.	No
Additional Numeric Data 1, Additional Numeric Data 2, Additional Numeric Data 3, ..., Additional Numeric Data 20	Used to specify additional information about the transaction. **Note:** These fields appear when you select the transaction source and record type from the respective list.	No

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Field Name	Field Description	Mandatory (Yes or No)
Note: If the business label is defined for any of these user defined fields, the business label appears instead of the field name.		
Additional Data 1, Additional Data 2, Additional Data 3, ..., Additional Data 50 **Note:** If the business label is defined for any of these user defined fields, the business label appears instead of the field name.	Used to specify additional information about the transaction. **Note:** These fields appear when you select the transaction source and record type from the respective list.	No

4. Enter the required details in the **Transaction Details** screen.
5. Click **Save**.

   The transaction is added in the system.

Note:

If the following option types are set in the **Dummy Header (C1-TXNDMYID)** feature configuration, the header details including the header ID are generated automatically for the manually added transaction:

- Dummy File Name
- Dummy Header ID
- Dummy Transaction Source
- Dummy Header Date

The header ID remains same for all transactions which are manually created on a particular date. You can cancel manually added transactions using the Transaction Header ID.

Related Topics

For more information on...	See...
Transaction Details screen	Transaction Details on page 1244
How to set the **Dummy Header (C1-TXNDMYID)** feature configuration	Setting the C1-TXNDMYID Feature Configuration on page 4467

Copying a Transaction

Instead of creating a manual transaction from scratch, you can create a manual transaction using an existing transaction. This is possible through copying a transaction. On copying a transaction, the details including the division, account identifier type, primary account identifier, transaction source, transaction record type, external reference number, and customer reference number are also copied to the new transaction. You can then edit the details, if required.

Prerequisites

To copy a transaction, you should have:

- Transaction (whose copy you want to create) available in the application

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- Divisions, account identifier types, transaction sources, transaction record types, and currencies defined in the application

Procedure

To copy a transaction:

1. Search for the transaction in the **Transaction Details** screen.
2. In the **Search Results** section, click the link in the **Transaction ID** or the **Transaction Information** column corresponding to the transaction whose copy you want to create.

   The **Transaction Details** screen appears.

   Note: The fields are in the read-only mode.

3. Click the **Copy** button available in the lower right corner of this screen.

   The **Transaction Details** screen appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Transaction Source	Used to specify the transaction source from where the transaction is received.	Yes
Division	Used to specify the division to which the transaction belongs. **Note:** You can only view those divisions to which you have access in the **Division** list.	Yes
Transaction Record Type	Used to specify the record type of the transaction.	Yes
Transaction Date	Used to specify the date when the transaction is performed.	Yes
Manual Entry	Indicates that the transaction is manually entered in the system.	Not applicable
Credit/Debit Indicator	Used to indicate whether the transaction is a debit or a credit transaction.	Yes
External Reference Number	Used to specify the external reference number of the transaction.	No
Customer Reference Number	Used to indicate the person who performed the transaction.	No
Account Identifier Type	Used to specify the type of account identifier.	Yes (Conditional) **Note:** If you enter the account identifier as a search criteria, you have to select the account identifier type.
Primary Account Identifier	Used to indicate the account for which the transaction is performed.	Yes (Conditional) **Note:** If you specify the account identifier type as a search criteria, you have to enter the account identifier.

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Field Name	Field Description	Mandatory (Yes or No)
Transaction Amount	Used to specify the transaction amount.	Yes
Transaction Currency	Used to indicate the currency in which the transaction is performed.	Yes
Transaction Volume	Used to specify the transaction volume.	Yes
Additional Amount 1, Additional Amount 2, ..., Additional Amount 10 **Note:** If the business label is defined for any of these user defined fields, the business label appears instead of the field name.	Used to specify additional information about the transaction. **Note:** These fields appear when you select the transaction source and record type from the respective list.	Yes (Conditional) **Note:** This field is required when you are specifying the currency in the corresponding field.
Amount 1 Currency Code, Amount 2 Currency Code, ..., Amount 10 Currency Code **Note:** If the business label is defined for any of these user defined fields, the business label appears instead of the field name.	Used to specify additional information about the transaction. **Note:** These fields appear when you select the transaction source and record type from the respective list.	Yes (Conditional) **Note:** This field is required when you are specifying the amount in the corresponding field.
Additional Date 1, Additional Date 2, ..., Additional Date 5 **Note:** If the business label is defined for any of these user defined fields, the business label appears instead of the field name.	Used to specify additional information about the transaction. **Note:** These fields appear when you select the transaction source and record type from the respective list.	No
Additional Numeric Data 1, Additional Numeric Data 2, Additional Numeric Data 3, ..., Additional Numeric Data 20 **Note:** If the business label is defined for any of these user defined fields, the business label appears instead of the field name.	Used to specify additional information about the transaction. **Note:** These fields appear when you select the transaction source and record type from the respective list.	No
Additional Data 1, Additional Data 2, Additional Data 3, ..., Additional Data 50	Used to specify additional information about the transaction.	No

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Field Name	Field Description	Mandatory (Yes or No)
Note: If the business label is defined for any of these user defined fields, the business label appears instead of the field name.	**Note:** These fields appear when you select the transaction source and record type from the respective list.	

4. Enter the required details in the **Transaction Details** screen.
5. Click **Save**.
   The new transaction is added in the system.

Related Topics

For more information on...	See...
How to search for a transaction	Searching for a Transaction on page 1251
Transaction Details screen	Transaction Details on page 1244

Transaction Source

The **Transaction Source** screen allows you to define, edit, delete, and copy a transaction source. It contains the following zone:

- Search Transaction Source on page 1258

Search Transaction Source

The **Search Transaction Source** zone allows you to search for a transaction source using various search criteria. It contains the following two sections:

- **Search Criteria** - The **Search Criteria** section contains the following fields:

Field name	Field Description	Mandatory (Yes or No)
Transaction Source	Used to search for a particular transaction source.	No
Description	Used to search transaction sources having a particular description.	No

- **Search Results** - On clicking the **Search** button, the search results appear based on the specified search criteria. The **Search Results** section contains the following columns:

Column Name	Column Description
Transaction Source	Displays the transaction source.
Description	Displays the description of the transaction source.
Account Identifier Type	Indicates the type of account identifier that will be received from the transaction source.
Edit	On clicking the **Edit** (✎) icon, the **Transaction Source** screen appears where you can edit the details of the existing transaction source.

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Column Name	Column Description
Delete	On clicking the **Delete** (🗑) icon, you can delete the transaction source.
	Note: You can delete a transaction source only when it is not yet used in the system.
Copy	On clicking the **Copy** (⧉) icon, the **Transaction Source** screen appears where you can define a new transaction source using an existing transaction source.

By default, the **Filter** area is hidden. You can view the **Filter** area by clicking the **Filters** (▽) icon available in the upper right corner of this zone.

Related Topics

For more information on...	See...
How to search for a transaction source	Searching for a Transaction Source on page 1259
How to edit a transaction source	Editing a Transaction Source on page 1260
How to delete a transaction source	Deleting a Transaction Source on page 1261
How to copy a transaction source	Copying a Transaction Source on page 1261

Searching for a Transaction Source

Procedure

To search for a transaction source:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **T** and then click **Transaction Source**.
   The **Transaction Source** screen appears.
3. Enter the search criteria in the **Search Transaction Source** zone.

   Note: ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.
4. Click **Search**.
   A list of transaction sources that meet the search criteria appears in the **Search Results** section.

Related Topics

For more information on...	See...
Transaction Source screen	Transaction Source on page 1258
Search Transaction Source zone	Search Transaction Source on page 1258

Defining a Transaction Source

Prerequisites

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To define a transaction source, you should have:

- Account identifier types defined in the application

Procedure

To define a transaction source:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **T** and then click **Transaction Source**.
   The **Transaction Source** screen appears.
3. Click the **Add** button in the upper right corner of the **Transaction Source** screen.

   The **Transaction Source** screen appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Transaction Source	Used to specify the transaction source. **Note:** You cannot specify any special character except underscore (_) in the **Transaction Source** field.	Yes
Description	Used to specify the description for the transaction source.	Yes
Account Identifier Type	Used to indicate the type of account identifier that will be received from the transaction source.	Yes

4. Enter the required details in the **Transaction Source** screen.
5. Click **Save**.
   The transaction source is defined.

Related Topics

For more information on...	See...
Transaction Source screen	Transaction Source on page 1258

Editing a Transaction Source

Prerequisites

To edit a transaction source, you should have:

- Account identifier types defined in the application

Procedure

To edit a transaction source:

1. Search for the transaction source in the **Transaction Source** screen.
2. In the **Search Results** section, click the **Edit** (✎) icon in the **Edit** column corresponding to the transaction source whose details you want to edit.

   The **Transaction Source** screen appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Transaction Source	Displays the transaction source.	Not applicable
Description	Used to specify the description for the transaction source.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
Account Identifier Type	Used to indicate the type of account identifier that will be received from the transaction source.	Yes

3. Modify the required details in the **Transaction Source** screen.
4. Click **Save**.
   The changes made to the transaction source are saved.

Related Topics

For more information on...	See...
How to search for a transaction source	Searching for a Transaction Source on page 1259

Deleting a Transaction Source

Procedure

To delete a transaction source:

1. Search for the transaction source in the **Transaction Source** screen.
2. In the **Search Results** section, click the **Delete** ( ) icon in the **Delete** column corresponding to the transaction source that you want to delete.
   A message appears confirming whether you want to delete the transaction source.
3. Click **OK**.
   The transaction source is deleted.

Note: You can delete a transaction source only when it is not yet used in the system.

Related Topics

For more information on...	See...
How to search for a transaction source	Searching for a Transaction Source on page 1259

Copying a Transaction Source

Instead of creating a transaction source from scratch, you can create a new transaction source using an existing transaction source. This is possible through copying a transaction source. On copying a transaction source, the details including the description and account identifier type are also copied to the new transaction source. You can then edit the details, if required.

Prerequisites

To copy a transaction source, you should have:

- Transaction source (whose copy you want to create) defined in the application
- Account identifier types defined in the application

Procedure

To copy a transaction source:

1. Search for the transaction source in the **Transaction Source** screen.

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2. In the **Search Results** section, click the **Copy** (⧉) icon in the **Copy** column corresponding to the transaction source whose copy you want to create.

   The **Transaction Source** screen appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Transaction Source	Used to specify the transaction source. **Note:** You cannot specify any special character except underscore (_) in the **Transaction Source** field.	Yes
Description	Used to specify the description for the transaction source.	Yes
Account Identifier Type	Used to indicate the type of account identifier that will be received from the transaction source.	Yes

3. Enter the required details in the **Transaction Source** screen.
4. Click **Save**.
   The new transaction source is defined.

Related Topics

For more information on...	See...
How to search for a transaction source	Searching for a Transaction Source on page 1259
Transaction Source screen	Transaction Source on page 1258

Transaction Record Type

The **Transaction Record Type** screen allows you to define, edit, delete, and copy a transaction record type. While defining a transaction record type, you need to define a rule type. This rule type is invoked for transactions with the transaction source and record type combination. While defining a rule type, you can select the transaction detail fields that you want to use as input or output parameters in a rule.

Besides using the transaction detail fields, the system allows you to use fields which are not part of the standard transaction details. These fields are referred to as temporary fields and are defined similar to other fields, but are not associated with any ORMB tables. You need to associate temporary fields with the rule type while defining a transaction record type. Once associated, you can use the temporary field as input or output parameter while defining a rule using the rule type.

Note: At present, you can only associate a temporary field with a rule type, but cannot use the temporary field in a rule which is created using the rule type. The latter part of the functionality will be available in a future release of Oracle Revenue Management and Billing.

The **Transaction Record Type** screen consists of the following zones:

- Search Transaction Record Type on page 1262

Search Transaction Record Type

The **Search Transaction Record Type** zone allows you to search for a transaction record type. This zone contains the following two sections:

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- **Search Criteria** - The **Search Criteria** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Transaction Source	Used to search transaction record types defined for a particular transaction source.	No
Transaction Record Type	Used to search a particular transaction record type.	No
Description	Used to search transaction record types with a particular description.	No

- **Search Results** - On clicking the **Search** button, the search results appear based on the specified search criteria. The **Search Results** section contains the following columns:

Column Name	Column Description
Transaction Record Type	Displays the transaction record type.
Description	Displays the description of the transaction record type.
Transaction Source	Indicates the transaction source for which the transaction record type is defined.
Rule Type	Indicates the rule type that is invoked for the transaction record type. **Note:** It has a link. On clicking the link, the **View Rule Type** screen appears where you can view the details of the respective rule type.
Edit	On clicking the **Edit** (✎) icon, the **Transaction Record Type** screen appears where you can edit the details of the transaction record type.
Delete	On clicking the **Delete** (🗑) icon, you can delete the transaction record type. **Note:** You can delete a transaction record type when: • It is not yet used. • Rules are not yet defined using the rule type which is invoked by the transaction source and record type combination.
Copy	On clicking the **Copy** (⧉) icon, the **Transaction Record Type** screen appears where you can create a new transaction record type using an existing transaction record type.

You can create a new transaction record type by clicking the **Add** link in the upper right corner of this zone.

Related Topics

For more information on...	See...
How to search for a transaction record type	Searching for a Transaction Record Type on page 1264
How to define a transaction record type	Defining a Transaction Record Type on page 1264
How to edit a transaction record type	Editing a Transaction Record Type on page 1269
How to delete a transaction record type	Deleting a Transaction Record Type on page 1274
How to copy a transaction record type	Copying a Transaction Record Type on page 1275

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Searching for a Transaction Record Type

Procedure

To search for a transaction record type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **T** and then click **Transaction Record Type**.
   The **Transaction Record Type** screen appears.
3. Enter the search criteria in the **Search Transaction Record Type** zone.

   Note: ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.
4. Click **Search**.
   The search results appear.

Related Topics

For more information on...	See...
Transaction Record Type screen	Transaction Record Type on page 1262
Search Transaction Record Type zone	Search Transaction Record Type on page 1262

Defining a Transaction Record Type

Prerequisites

To define a transaction record type, you should have:

- Transaction sources defined in the application
- Validation algorithm defined using the **C1-RULE-VAL** algorithm type
- Transaction Information String algorithm defined using the **C1-TXDETINFO** algorithm type
- Fields (that you want to use as input or output parameter) defined in the application

Procedure

To define a transaction record type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **T** and then click **Transaction Record Type**.
   The **Transaction Record Type** screen appears.
3. Click the **Add** link in the upper right corner of the **Search Transaction Record Type** zone.

   The **Transaction Record Type** screen appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Transaction Source	Used to indicate the transaction source for which you want to define the transaction record type.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The **Search** (🔍) icon appears corresponding to this field. On clicking the **Search** icon, the **Search Transaction Source** window appears.	
Transaction Record Type	Used to specify the transaction record type. **Note:** You cannot specify any special character except underscore (_) in the transaction record type.	Yes
Description	Used to specify the description for the transaction record type.	Yes
Rule Type	Used to specify the rule type. **Note:** You cannot specify any special character except underscore (_) in the rule type.	Yes
Rule Type Description	Used to specify the description for the rule type.	Yes
Rule Validation Algorithm	Used to specify the validation algorithm that will be triggered when a rule is defined using the rule type. **Note:** This algorithm checks whether: • The values specified against the output parameters exist in the system • The same price item parameter (for example, PCD1_1_1_VAL) is not used multiple times for a division, account, and price item combination The **Search** (🔍) icon appears corresponding to this field. On clicking the **Search** icon, the **Algorithm Search** window appears.	No
Info String Algorithm	Used to specify the algorithm that will generate the information string which appears in the **Transaction Information** column throughout the application. **Note:** This algorithm concatenates the fields (related to the transaction) and delimiters specified as parameters in the algorithm. The **Search** (🔍) icon appears corresponding to this field. On clicking the **Search** icon, the **Algorithm Search** window appears.	No
Maximum Accounts to be charged	Used to indicate the maximum number of accounts which can bear the charges for a transaction. The valid values are: • 01 • 02 • 03	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	• 04 • 05 • 06 • 07 • 08 • 09 • 10 **Note:** At present, the system supports maximum 10 accounts which can bear the charges for a transaction.	
Maximum Price Items to be mapped	Used to indicate the maximum number of price items to which a transaction can be mapped for each account. The valid values are: • 01 • 02 • 03 • 04 • 05 • 06 • 07 • 08 • 09 • 10 **Note:** At present, the system supports maximum 10 price items to which a transaction can be mapped for each account.	Yes
Maximum Price Item Parameters	Used to indicate the maximum number of parameters that can be used with each price item to determine the price item pricing. The valid values are: • 00 • 01 • 02 • 03 • 04 • 05 • 06 • 07 • 08 • 09 • 10 • 11 • 12 • 13 • 14 • 15	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	Note: At present, the system supports maximum 15 parameters that can be used with each price item to determine the price item pricing.	

In addition, this screen contains the following two sections:

- **Input/Output Parameters** - Enables you to select the transaction detail fields that you can use as input or output parameter while defining a rule. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Rule Input/Output	Used to indicate whether you want to use the transaction detail field as input or output parameter.	No
Transaction Field	Displays the transaction field name.	Not applicable
Business Label	Used to specify a business label for the user defined fields.	No
	Note: The business label appears when you add, copy, or view a transaction in the **Transaction Details** screen. The label changes depending on the transaction source and record type combination that you have selected.	

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Note: At present, you can use the following transaction fields as input or output parameter while defining a rule - Account Identifier (ACCT_NBR), Account Identifier Type (ACCT_NBR_TYPE_CD), Division (CIS_DIVISION), Currency Code (CURRENCY_CD), Customer Reference Number (CUST_REF_NBR), Do not Aggregate Switch (DO_NOT_AGG_SW), External Reference Number (EXT_TXN_NBR), Credit/Debit Indicator (HOW_TO_USE_TXN_FLG), Manual Entry (MANUAL_SW), Transaction Amount (TXN_AMT), Transaction Date (TXN_DTTM), Transaction Record Type (TXN_REC_TYPE_CD), Transaction Source (TXN_SOURCE_CD), Transaction Upload Date (TXN_UPLOAD_DTTM), Transaction Volume (TXN_VOL), Additional Amount 1 (UDF_AMT_1), Additional Amount 2 (UDF_AMT_2), Additional Amount 3 (UDF_AMT_3), Additional Amount 4 (UDF_AMT_4), Additional Amount 5 (UDF_AMT_5), Additional Amount 6 (UDF_AMT_6), Additional Amount 7 (UDF_AMT_7), Additional Amount 8 (UDF_AMT_8), Additional Amount 9 (UDF_AMT_9), Additional Amount 10 (UDF_AMT_10), Additional Data 1 (UDF_CHAR_1), Additional Data 2 (UDF_CHAR_2), Additional Data 3 (UDF_CHAR_3), Additional Data 4 (UDF_CHAR_4), Additional Data 5 (UDF_CHAR_5), Additional Data 6 (UDF_CHAR_6), Additional Data 7 (UDF_CHAR_7), Additional Data 8 (UDF_CHAR_8), Additional Data 9 (UDF_CHAR_9), Additional Data 10 (UDF_CHAR_10), Additional Data 11 (UDF_CHAR_11), Additional Data 12 (UDF_CHAR_12), Additional Data 13 (UDF_CHAR_13), Additional Data 14 (UDF_CHAR_14), Additional Data 15 (UDF_CHAR_15), Additional Data 16 (UDF_CHAR_16), Additional Data 17 (UDF_CHAR_17), Additional Data 18 (UDF_CHAR_18), Additional Data 19 (UDF_CHAR_19), Additional Data 20 (UDF_CHAR_20), Additional Data 21 (UDF_CHAR_21), Additional Data 22 (UDF_CHAR_22), Additional Data 23 (UDF_CHAR_23), Additional Data 24 (UDF_CHAR_24), Additional Data 25 (UDF_CHAR_25), Additional Data 26 (UDF_CHAR_26), Additional Data 27 (UDF_CHAR_27), Additional Data 28 (UDF_CHAR_28), Additional Data 29 (UDF_CHAR_29), Additional Data 30 (UDF_CHAR_30), Additional Data 31 (UDF_CHAR_31), Additional Data 32 (UDF_CHAR_32), Additional Data 33 (UDF_CHAR_33), Additional Data 34 (UDF_CHAR_34), Additional Data 35 (UDF_CHAR_35), Additional Data 36 (UDF_CHAR_36), Additional Data 37 (UDF_CHAR_37), Additional Data 38 (UDF_CHAR_38), Additional Data 39 (UDF_CHAR_39), Additional Data 40 (UDF_CHAR_40), Additional Data 41 (UDF_CHAR_41), Additional Data 42 (UDF_CHAR_42), Additional Data 43 (UDF_CHAR_43), Additional Data 44 (UDF_CHAR_44), Additional Data 45 (UDF_CHAR_45), Additional Data 46 (UDF_CHAR_46), Additional Data 47 (UDF_CHAR_47), Additional Data 48 (UDF_CHAR_48), Additional Data 49 (UDF_CHAR_49), Additional Data 50 (UDF_CHAR_50), Amount 1 Currency Code (UDF_CURRENCY_CD_1), Amount 2 Currency Code (UDF_CURRENCY_CD_2), Amount 3 Currency Code (UDF_CURRENCY_CD_3), Amount 4 Currency Code (UDF_CURRENCY_CD_4), Amount 5 Currency Code (UDF_CURRENCY_CD_5), Amount 6 Currency Code (UDF_CURRENCY_CD_6), Amount 7 Currency Code (UDF_CURRENCY_CD_7), Amount 8 Currency Code (UDF_CURRENCY_CD_8), Amount 9 Currency Code (UDF_CURRENCY_CD_9), Amount 10 Currency Code (UDF_CURRENCY_CD_10), Additional Date 1 (UDF_DTTM_1), Additional Date 2 (UDF_DTTM_2), Additional Date 3 (UDF_DTTM_3), Additional Date 4 (UDF_DTTM_4), Additional Date 5 (UDF_DTTM_5), Additional Numeric Data 1 (UDF_NBR_1), Additional Numeric Data 2 (UDF_NBR_2), Additional Numeric Data 3 (UDF_NBR_3), Additional Numeric Data 4 (UDF_NBR_4), Additional Numeric Data 5 (UDF_NBR_5), Additional Numeric Data 6 (UDF_NBR_6), Additional Numeric Data 7 (UDF_NBR_7), Additional Numeric Data 8 (UDF_NBR_8), Additional Numeric Data 9 (UDF_NBR_9), Additional Numeric Data 10 (UDF_NBR_10), Additional Numeric Data 11 (UDF_NBR_11), Additional Numeric Data 12 (UDF_NBR_12), Additional Numeric Data 13 (UDF_NBR_13), Additional Numeric Data 14 (UDF_NBR_14), Additional Numeric Data 15 (UDF_NBR_15), Additional Numeric Data 16 (UDF_NBR_16), Additional Numeric Data 17 (UDF_NBR_17), Additional Numeric Data 18 (UDF_NBR_18), Additional Numeric Data 19 (UDF_NBR_19), Additional Numeric Data 20 (UDF_NBR_20).

- **Temporary Fields** - Enables you to select non-transactional fields that you can use as input or output parameter while defining a rule. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Temporary Field	Used to indicate the non-transactional field that you want to use as input or output parameter.	No

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The **Search** (🔍) icon appears corresponding to this field. On clicking the **Search** icon, the **Transaction Record Type Tempo Field Search** window appears.	

4. Enter the required details.

Note: You can search for a transaction source and algorithm by clicking the **Search** (🔍) icon corresponding to the respective field.

5. Select the check box corresponding to the transaction fields that you want to use as input or output parameters.
6. If required, you can select a non-transactional field as input or output parameter in the **Temporary Fields** *s*ection.

Note:

You can search for a field by clicking the **Search** (🔍) icon corresponding to the respective field.

If you want to add more than one temporary field to the transaction record type, click the **Add** (+) icon *a*nd then repeat step 7. However, if you want to remove a temporary field from the transaction record type, click the **Delete** (🗑) icon corresponding to the temporary field.

7. Click **Save**.
   The transaction record type is defined.

Related Topics

For more information on...	See...
Transaction Record Type screen	Transaction Record Type on page 1262
Search Transaction Record Type zone	Search Transaction Record Type on page 1262

Editing a Transaction Record Type

Prerequisites

To edit a transaction record type, you should have:

- Validation algorithm defined using the **C1-RULE-VAL** algorithm type
- Transaction Information String algorithm defined using the **C1-TXDETINFO** algorithm type
- Fields (that you want to use as input or output parameter) defined in the application

Procedure

To edit a transaction record type:

1. Search for the transaction record type in the **Transaction Record Type** screen.
2. In the **Search Results** section, click the **Edit** (✎) icon in the **Edit** column corresponding to the transaction *r*ecord type whose details you want to edit.

   The **Transaction Record Type** screen appears. It contains the following fields:

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Field Name	Field Description	Mandatory (Yes or No)
Transaction Source	Used to indicate the transaction source for which you want to define the transaction record type. **Note:** The **Search** (🔍) icon appears corresponding to this field. On clicking the **Search** icon, the **Search Transaction Source** window appears.	Yes
Transaction Record Type	Used to specify the transaction record type. **Note:** You cannot specify any special character except underscore (_) in the transaction record type.	Yes
Description	Used to specify the description for the transaction record type.	Yes
Rule Type	Used to specify the rule type. **Note:** You cannot specify any special character except underscore (_) in the rule type.	Yes
Rule Type Description	Used to specify the description for the rule type.	Yes
Rule Validation Algorithm	Used to specify the validation algorithm that will be triggered when a rule is defined using the rule type. **Note:** This algorithm checks whether: • The values specified against the output parameters exist in the system • The same price item parameter (for example, PCD1_1_1_VAL) is not used multiple times for a division, account, and price item combination The **Search** (🔍) icon appears corresponding to this field. On clicking the **Search** icon, the **Algorithm Search** window appears.	No
Info String Algorithm	Used to specify the algorithm that will generate the information string which appears in the **Transaction Information** column throughout the application. **Note:** This algorithm concatenates the fields (related to the transaction) and delimiters specified as parameters in the algorithm. The **Search** (🔍) icon appears corresponding to this field. On clicking the **Search** icon, the **Algorithm Search** window appears.	No
Maximum Accounts to be charged	Used to indicate the maximum number of accounts which can bear the charges for a transaction. The valid values are:	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	• 01 • 02 • 03 • 04 • 05 • 06 • 07 • 08 • 09 • 10 **Note:** At present, the system supports maximum 10 accounts which can bear the charges for a transaction.	
Maximum Price Items to be mapped	Used to indicate the maximum number of price items to which a transaction can be mapped for each account. The valid values are: • 01 • 02 • 03 • 04 • 05 • 06 • 07 • 08 • 09 • 10 **Note:** At present, the system supports maximum 10 price items to which a transaction can be mapped for each account.	Yes
Maximum Price Item Parameters	Used to indicate the maximum number of parameters that can be used with each price item to determine the price item pricing. The valid values are: • 00 • 01 • 02 • 03 • 04 • 05 • 06 • 07 • 08 • 09 • 10 • 11 • 12 • 13	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	• 14 • 15 **Note:** At present, the system supports maximum 15 parameters that can be used with each price item to determine the price item pricing.	

In addition, this screen contains the following two sections:

- **Input/Output Parameters** - Enables you to select the transaction detail fields that you can use as input or output parameter while defining a rule. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Rule Input/Output	Used to indicate whether you want to use the transaction detail field as input or output parameter.	No
Transaction Field	Displays the transaction field name.	Not applicable
Business Label	Used to specify a business label for the user defined fields. **Note:** The business label appears when you add, copy, or view a transaction in the **Transaction Details** screen. The label changes depending on the transaction source and record type combination that you have selected.	No

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Note: At present, you can use the following transaction fields as input or output parameter while defining a rule - Account Identifier (ACCT_NBR), Account Identifier Type (ACCT_NBR_TYPE_CD), Division (CIS_DIVISION), Currency Code (CURRENCY_CD), Customer Reference Number (CUST_REF_NBR), Do not Aggregate Switch (DO_NOT_AGG_SW), External Reference Number (EXT_TXN_NBR), Credit/Debit Indicator (HOW_TO_USE_TXN_FLG), Manual Entry (MANUAL_SW), Transaction Amount (TXN_AMT), Transaction Date (TXN_DTTM), Transaction Record Type (TXN_REC_TYPE_CD), Transaction Source (TXN_SOURCE_CD), Transaction Upload Date (TXN_UPLOAD_DTTM), Transaction Volume (TXN_VOL), Additional Amount 1 (UDF_AMT_1), Additional Amount 2 (UDF_AMT_2), Additional Amount 3 (UDF_AMT_3), Additional Amount 4 (UDF_AMT_4), Additional Amount 5 (UDF_AMT_5), Additional Amount 6 (UDF_AMT_6), Additional Amount 7 (UDF_AMT_7), Additional Amount 8 (UDF_AMT_8), Additional Amount 9 (UDF_AMT_9), Additional Amount 10 (UDF_AMT_10), Additional Data 1 (UDF_CHAR_1), Additional Data 2 (UDF_CHAR_2), Additional Data 3 (UDF_CHAR_3), Additional Data 4 (UDF_CHAR_4), Additional Data 5 (UDF_CHAR_5), Additional Data 6 (UDF_CHAR_6), Additional Data 7 (UDF_CHAR_7), Additional Data 8 (UDF_CHAR_8), Additional Data 9 (UDF_CHAR_9), Additional Data 10 (UDF_CHAR_10), Additional Data 11 (UDF_CHAR_11), Additional Data 12 (UDF_CHAR_12), Additional Data 13 (UDF_CHAR_13), Additional Data 14 (UDF_CHAR_14), Additional Data 15 (UDF_CHAR_15), Additional Data 16 (UDF_CHAR_16), Additional Data 17 (UDF_CHAR_17), Additional Data 18 (UDF_CHAR_18), Additional Data 19 (UDF_CHAR_19), Additional Data 20 (UDF_CHAR_20), Additional Data 21 (UDF_CHAR_21), Additional Data 22 (UDF_CHAR_22), Additional Data 23 (UDF_CHAR_23), Additional Data 24 (UDF_CHAR_24), Additional Data 25 (UDF_CHAR_25), Additional Data 26 (UDF_CHAR_26), Additional Data 27 (UDF_CHAR_27), Additional Data 28 (UDF_CHAR_28), Additional Data 29 (UDF_CHAR_29), Additional Data 30 (UDF_CHAR_30), Additional Data 31 (UDF_CHAR_31), Additional Data 32 (UDF_CHAR_32), Additional Data 33 (UDF_CHAR_33), Additional Data 34 (UDF_CHAR_34), Additional Data 35 (UDF_CHAR_35), Additional Data 36 (UDF_CHAR_36), Additional Data 37 (UDF_CHAR_37), Additional Data 38 (UDF_CHAR_38), Additional Data 39 (UDF_CHAR_39), Additional Data 40 (UDF_CHAR_40), Additional Data 41 (UDF_CHAR_41), Additional Data 42 (UDF_CHAR_42), Additional Data 43 (UDF_CHAR_43), Additional Data 44 (UDF_CHAR_44), Additional Data 45 (UDF_CHAR_45), Additional Data 46 (UDF_CHAR_46), Additional Data 47 (UDF_CHAR_47), Additional Data 48 (UDF_CHAR_48), Additional Data 49 (UDF_CHAR_49), Additional Data 50 (UDF_CHAR_50), Amount 1 Currency Code (UDF_CURRENCY_CD_1), Amount 2 Currency Code (UDF_CURRENCY_CD_2), Amount 3 Currency Code (UDF_CURRENCY_CD_3), Amount 4 Currency Code (UDF_CURRENCY_CD_4), Amount 5 Currency Code (UDF_CURRENCY_CD_5), Amount 6 Currency Code (UDF_CURRENCY_CD_6), Amount 7 Currency Code (UDF_CURRENCY_CD_7), Amount 8 Currency Code (UDF_CURRENCY_CD_8), Amount 9 Currency Code (UDF_CURRENCY_CD_9), Amount 10 Currency Code (UDF_CURRENCY_CD_10), Additional Date 1 (UDF_DTTM_1), Additional Date 2 (UDF_DTTM_2), Additional Date 3 (UDF_DTTM_3), Additional Date 4 (UDF_DTTM_4), Additional Date 5 (UDF_DTTM_5), Additional Numeric Data 1 (UDF_NBR_1), Additional Numeric Data 2 (UDF_NBR_2), Additional Numeric Data 3 (UDF_NBR_3), Additional Numeric Data 4 (UDF_NBR_4), Additional Numeric Data 5 (UDF_NBR_5), Additional Numeric Data 6 (UDF_NBR_6), Additional Numeric Data 7 (UDF_NBR_7), Additional Numeric Data 8 (UDF_NBR_8), Additional Numeric Data 9 (UDF_NBR_9), Additional Numeric Data 10 (UDF_NBR_10), Additional Numeric Data 11 (UDF_NBR_11), Additional Numeric Data 12 (UDF_NBR_12), Additional Numeric Data 13 (UDF_NBR_13), Additional Numeric Data 14 (UDF_NBR_14), Additional Numeric Data 15 (UDF_NBR_15), Additional Numeric Data 16 (UDF_NBR_16), Additional Numeric Data 17 (UDF_NBR_17), Additional Numeric Data 18 (UDF_NBR_18), Additional Numeric Data 19 (UDF_NBR_19), Additional Numeric Data 20 (UDF_NBR_20).

- **Temporary Fields** - Enables you to select non-transactional fields that you can use as input or output parameter while defining a rule. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Temporary Field	Used to indicate the non-transactional field that you want to use as input or output parameter.	No

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The **Search** (🔍) icon appears corresponding to this field. On clicking the **Search** icon, the **Transaction Record Type Tempo Field Search** window appears.	

3. Modify the required details.

> **Note:**
>
> You can search for an algorithm and field by clicking the **Search** (🔍) icon corresponding to the respective field.
>
> You can edit and remove an input or output parameter from a rule type when it is not yet used in a rule (which is created using the rule type).
>
> If you want to add more than one temporary field to the transaction record type, click the **Add** (+) icon *a*nd then specify the details in the **Temporary Fields** section. However, if you want to remove a temporary field from the transaction record type, click the **Delete** (🗑) icon corresponding to the temporary field.

4. Click **Save**.
   The changes made to the transaction record type are saved.

Related Topics

For more information on...	See...
How to search for a transaction record type	Searching for a Transaction Record Type on page 1264

Deleting a Transaction Record Type

Procedure

To delete a transaction record type:

1. Search for the transaction record type in the **Transaction Record Type** screen.
2. In the **Search Results** section, click the **Delete** (🗑) icon in the **Delete** column corresponding to the transaction *r*ecord type that you want to delete.
   A message appears confirming whether you want to delete the transaction record type.
3. Click **OK**.
   The transaction record type is deleted.

> **Note:** You can delete a transaction record type only when it is not yet used in the system.

Related Topics

For more information on...	See...
How to search for a transaction record type	Searching for a Transaction Record Type on page 1264

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Copying a Transaction Record Type

Instead of creating a transaction record type from scratch, you can create a new transaction record type using an existing transaction record type. This is possible through copying a transaction record type. On copying of a transaction record type, the details including the input or output parameters and temporary fields are also copied to the new transaction record type. You can then edit the details, if required.

Prerequisites

To copy a transaction record type, you should have:

- Transaction record type (whose copy you want to create) defined in the application
- Validation algorithm defined using the **C1-RULE-VAL** algorithm type
- Transaction Information String algorithm defined using the **C1-TXDETINFO** algorithm type
- Fields (that you want to use as input or output parameter) defined in the application

Procedure

To copy a transaction record type:

1. Search for the transaction record type in the **Transaction Record Type** screen.
2. In the **Search Results** section, click the **Copy** (⎘) icon in the **Copy** column corresponding to the transaction *r*ecord type whose copy you want to create.

   The **Transaction Record Type** screen appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Transaction Source	Used to indicate the transaction source for which you want to define the transaction record type. **Note:** The **Search** (🔍) icon appears corresponding to this field. On clicking the **Search** icon, the **Search Transaction Source** window appears where you can search for the required transaction source.	Yes
Transaction Record Type	Used to specify the transaction record type. **Note:** You cannot specify any special character except underscore (_) in the transaction record type.	Yes
Description	Used to specify the description for the transaction record type.	Yes
Rule Type	Used to specify the rule type. **Note:** You cannot specify any special character except underscore (_) in the rule type.	Yes
Rule Type Description	Used to specify the description for the rule type.	Yes
Rule Validation Algorithm	Used to specify the validation algorithm that will be triggered when a rule is defined using the rule type.	No

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Field Name	Field Description	Mandatory (Yes or No)
	Note: This algorithm checks whether: • The values specified against the output parameters exist in the system • The same price item parameter (for example, PCD1_1_1_VAL) is not used multiple times for a division, account, and price item combination The **Search** (🔍) icon appears corresponding to this field. On clicking the **Search** icon, the **Algorithm Search** window appears where you can search for the required algorithm.	
Info String Algorithm	Used to specify the algorithm that will generate the information string which appears in the **Transaction Information** column throughout the application. **Note:** This algorithm concatenates the fields (related to the transaction) and delimiters specified as parameters in the algorithm. The **Search** (🔍) icon appears corresponding to this field. On clicking the **Search** icon, the **Algorithm Search** window appears where you can search for the required algorithm.	No
Maximum Accounts to be charged	Used to indicate the maximum number of accounts which can bear the charges for a transaction. The valid values are: • 01 • 02 • 03 • 04 • 05 • 06 • 07 • 08 • 09 • 10 **Note:** At present, the system supports maximum 10 accounts which can bear the charges for a transaction.	Yes
Maximum Price Items to be mapped	Used to indicate the maximum number of price items to which a transaction can be mapped for each account. The valid values are: • 01 • 02 • 03 • 04 • 05 • 06 • 07	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	• 08 • 09 • 10 **Note:** At present, the system supports maximum 10 price items to which a transaction can be mapped for each account.	
Maximum Price Item Parameters	Used to indicate the maximum number of parameters that can be used with each price item to determine the price item pricing. The valid values are: • 00 • 01 • 02 • 03 • 04 • 05 • 06 • 07 • 08 • 09 • 10 • 11 • 12 • 13 • 14 • 15 **Note:** At present, the system supports maximum 15 parameters that can be used with each price item to determine the price item pricing.	Yes

In addition, this screen contains the following two sections:

- **Input/Output Parameters** - Enables you to select the transaction detail fields that you can use as input or output parameter while defining a rule. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Rule Input/Output	Used to indicate whether you want to use the transaction detail field as input or output parameter.	No
Transaction Field	Displays the transaction field name.	Not applicable
Business Label	Used to specify a business label for the user defined fields. **Note:** The business label appears when you add, copy, or view a transaction in the **Transaction Details** screen. The label changes depending on the transaction source and record type combination that you have selected.	No

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Note: At present, you can use the following transaction fields as input or output parameter while defining a rule - Account Identifier (ACCT_NBR), Account Identifier Type (ACCT_NBR_TYPE_CD), Division (CIS_DIVISION), Currency Code (CURRENCY_CD), Customer Reference Number (CUST_REF_NBR), Do not Aggregate Switch (DO_NOT_AGG_SW), External Reference Number (EXT_TXN_NBR), Credit/Debit Indicator (HOW_TO_USE_TXN_FLG), Manual Entry (MANUAL_SW), Transaction Amount (TXN_AMT), Transaction Date (TXN_DTTM), Transaction Record Type (TXN_REC_TYPE_CD), Transaction Source (TXN_SOURCE_CD), Transaction Upload Date (TXN_UPLOAD_DTTM), Transaction Volume (TXN_VOL), Additional Amount 1 (UDF_AMT_1), Additional Amount 2 (UDF_AMT_2), Additional Amount 3 (UDF_AMT_3), Additional Amount 4 (UDF_AMT_4), Additional Amount 5 (UDF_AMT_5), Additional Amount 6 (UDF_AMT_6), Additional Amount 7 (UDF_AMT_7), Additional Amount 8 (UDF_AMT_8), Additional Amount 9 (UDF_AMT_9), Additional Amount 10 (UDF_AMT_10), Additional Data 1 (UDF_CHAR_1), Additional Data 2 (UDF_CHAR_2), Additional Data 3 (UDF_CHAR_3), Additional Data 4 (UDF_CHAR_4), Additional Data 5 (UDF_CHAR_5), Additional Data 6 (UDF_CHAR_6), Additional Data 7 (UDF_CHAR_7), Additional Data 8 (UDF_CHAR_8), Additional Data 9 (UDF_CHAR_9), Additional Data 10 (UDF_CHAR_10), Additional Data 11 (UDF_CHAR_11), Additional Data 12 (UDF_CHAR_12), Additional Data 13 (UDF_CHAR_13), Additional Data 14 (UDF_CHAR_14), Additional Data 15 (UDF_CHAR_15), Additional Data 16 (UDF_CHAR_16), Additional Data 17 (UDF_CHAR_17), Additional Data 18 (UDF_CHAR_18), Additional Data 19 (UDF_CHAR_19), Additional Data 20 (UDF_CHAR_20), Additional Data 21 (UDF_CHAR_21), Additional Data 22 (UDF_CHAR_22), Additional Data 23 (UDF_CHAR_23), Additional Data 24 (UDF_CHAR_24), Additional Data 25 (UDF_CHAR_25), Additional Data 26 (UDF_CHAR_26), Additional Data 27 (UDF_CHAR_27), Additional Data 28 (UDF_CHAR_28), Additional Data 29 (UDF_CHAR_29), Additional Data 30 (UDF_CHAR_30), Additional Data 31 (UDF_CHAR_31), Additional Data 32 (UDF_CHAR_32), Additional Data 33 (UDF_CHAR_33), Additional Data 34 (UDF_CHAR_34), Additional Data 35 (UDF_CHAR_35), Additional Data 36 (UDF_CHAR_36), Additional Data 37 (UDF_CHAR_37), Additional Data 38 (UDF_CHAR_38), Additional Data 39 (UDF_CHAR_39), Additional Data 40 (UDF_CHAR_40), Additional Data 41 (UDF_CHAR_41), Additional Data 42 (UDF_CHAR_42), Additional Data 43 (UDF_CHAR_43), Additional Data 44 (UDF_CHAR_44), Additional Data 45 (UDF_CHAR_45), Additional Data 46 (UDF_CHAR_46), Additional Data 47 (UDF_CHAR_47), Additional Data 48 (UDF_CHAR_48), Additional Data 49 (UDF_CHAR_49), Additional Data 50 (UDF_CHAR_50), Amount 1 Currency Code (UDF_CURRENCY_CD_1), Amount 2 Currency Code (UDF_CURRENCY_CD_2), Amount 3 Currency Code (UDF_CURRENCY_CD_3), Amount 4 Currency Code (UDF_CURRENCY_CD_4), Amount 5 Currency Code (UDF_CURRENCY_CD_5), Amount 6 Currency Code (UDF_CURRENCY_CD_6), Amount 7 Currency Code (UDF_CURRENCY_CD_7), Amount 8 Currency Code (UDF_CURRENCY_CD_8), Amount 9 Currency Code (UDF_CURRENCY_CD_9), Amount 10 Currency Code (UDF_CURRENCY_CD_10), Additional Date 1 (UDF_DTTM_1), Additional Date 2 (UDF_DTTM_2), Additional Date 3 (UDF_DTTM_3), Additional Date 4 (UDF_DTTM_4), Additional Date 5 (UDF_DTTM_5), Additional Numeric Data 1 (UDF_NBR_1), Additional Numeric Data 2 (UDF_NBR_2), Additional Numeric Data 3 (UDF_NBR_3), Additional Numeric Data 4 (UDF_NBR_4), Additional Numeric Data 5 (UDF_NBR_5), Additional Numeric Data 6 (UDF_NBR_6), Additional Numeric Data 7 (UDF_NBR_7), Additional Numeric Data 8 (UDF_NBR_8), Additional Numeric Data 9 (UDF_NBR_9), Additional Numeric Data 10 (UDF_NBR_10), Additional Numeric Data 11 (UDF_NBR_11), Additional Numeric Data 12 (UDF_NBR_12), Additional Numeric Data 13 (UDF_NBR_13), Additional Numeric Data 14 (UDF_NBR_14), Additional Numeric Data 15 (UDF_NBR_15), Additional Numeric Data 16 (UDF_NBR_16), Additional Numeric Data 17 (UDF_NBR_17), Additional Numeric Data 18 (UDF_NBR_18), Additional Numeric Data 19 (UDF_NBR_19), Additional Numeric Data 20 (UDF_NBR_20).

- **Temporary Fields** - Enables you to select non-transactional fields that you can use as input or output parameter while defining a rule. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Temporary Field	Used to indicate the non-transactional field that you want to use as input or output parameter.	No

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The **Search** (🔍) icon appears corresponding to this field. On clicking the **Search** icon, the **Transaction Record Type Tempo Field Search** window appears.	

3. Enter the required details.

Note: You can search for an algorithm by clicking the **Search** (🔍) icon corresponding to the respective field.

4. Select the check box corresponding to the transaction fields that you want to use as input or output parameters.
5. If required, you can select a non-transactional field as input or output parameter in the **Temporary Fields** *s*ection.

Note:

You can search for a field by clicking the **Search** (🔍) icon corresponding to the respective field.

If you want to add more than one temporary field to the transaction record type, click the **Add** (+) icon *a*nd then repeat step 5. However, if you want to remove a temporary field from the transaction record type, click the **Delete** (🗑) icon corresponding to the temporary field.

6. Click **Save**.
   The new transaction record type is defined.

Related Topics

For more information on...	See...
How to search for a transaction record type	Searching for a Transaction Record Type on page 1264

Transaction Aggregation Rule

The **Transaction Aggregation Rule** screen allows you to define transaction aggregation rule for an SQI. You can also edit and delete the transaction aggregation rule of an SQI. This screen consists of the following zones:

- Transaction Aggregation Rules on page 1279

Transaction Aggregation Rules

The **Transaction Aggregation Rules** zone lists transaction aggregation rules that are already defined in the system. You can define, edit, and delete a transaction aggregation rule through this zone.

This zone contains the following columns:

Column Name	Column Description
SQI Description	Displays the description of the service quantity identifier (SQI).
Aggregation Function	Indicates the formula used in the transaction aggregation rule defined for the SQI.
Function	Indicates the function used for aggregation.

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Column Name	Column Description
Transaction Parameter	Indicates the transaction parameter used for aggregation.
Edit	On clicking the **Edit** (✎) icon, the **Transaction Aggregation Rule** screen appears where you can edit the aggregation rule.
Delete	On clicking the **Delete** (🗑) icon, you can delete the transaction aggregation rule.

You can define transaction aggregation rule for an SQI by clicking the **Add** link in the upper right corner of this zone. You can also change the layout of this zone. For more information on how to change the layout, see Changing the Layout on page 4410.

Related Topics

For more information on...	See...
How to define transaction aggregation rule for an SQI	Defining Transaction Aggregation Rule for an SQI on page 1280
How to edit transaction aggregation rule of an SQI	Editing Transaction Aggregation Rule of an SQI on page 1281
How to delete transaction aggregation rule of an SQI	Deleting Transaction Aggregation Rule of an SQI on page 1282

Defining Transaction Aggregation Rule for an SQI

Prerequisites

To define transaction aggregation rule for an SQI, you should have:

- SQI defined in the application

Procedure

To define transaction aggregation rule for an SQI:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **T** and then click **Transaction Aggregation Rule**.
   The **Transaction Aggregation Rule** screen appears.
3. Click the **Add** link in the upper right corner of the **Transaction Aggregation Rules** zone.

   The **Transaction Aggregation Rule** screen appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
SQI	Used to indicate the SQI for which you want to define the transaction aggregation rule.	Yes
Function	Used to indicate the function that you want to use for aggregation. The valid values are: • SUM() • MIN() • MAX() • COUNT()	Yes
Transaction Parameter	Used to indicate the transaction parameter that you want to use for aggregation. The valid values are:	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	• TXN_AMT • TXN_VOL • UDF_AMT_1, UDF_AMT_2, UDF_AMT_3, ..., UDF_AMT_10 • UDF_NBR_1, UDF_NBR_2, UDF_NBR_3, ..., UDF_NBR_20	

4. Enter the required details.
5. Click **Save**.
   The transaction aggregation rule is defined for the SQI.

Related Topics

For more information on...	See...
Transaction Aggregation Rule screen	Transaction Aggregation Rule on page 1279
Transaction Aggregation Rules zone	Transaction Aggregation Rules on page 1279

Editing Transaction Aggregation Rule of an SQI

Procedure

To edit the transaction aggregation rule of an SQI:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **T** and then click **Transaction Aggregation Rule**.
   The **Transaction Aggregation Rule** screen appears.
3. Click the **Edit** (✎) icon in the **Edit** column corresponding to the SQI whose transaction aggregation rule you *w*ant to edit.

   The **Transaction Aggregation Rule** screen appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
SQI	Indicates the SQI for which the transaction aggregation rule is defined.	Not applicable
Function	Used to indicate the function that you want to use for aggregation. The valid values are: • SUM() • MIN() • MAX() • COUNT()	Yes
Transaction Parameter	Used to indicate the transaction parameter that you want to use for aggregation. The valid values are: • TXN_AMT • TXN_VOL • UDF_AMT_1, UDF_AMT_2, UDF_AMT_3, ..., UDF_AMT_10	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	• UDF_NBR_1, UDF_NBR_2, UDF_NBR_3, ..., UDF_NBR_20	

4. Modify the required details.
5. Click **Save**.
   The changes made to the transaction aggregation rule are saved.

Related Topics

For more information on...	See...
Transaction Aggregation Rule screen	Transaction Aggregation Rule on page 1279
Transaction Aggregation Rules zone	Transaction Aggregation Rules on page 1279

Deleting Transaction Aggregation Rule of an SQI

Procedure

To delete the transaction aggregation rule of an SQI:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **T** and then click **Transaction Aggregation Rule**.
   The **Transaction Aggregation Rule** screen appears.
3. Click the **Delete** (🗑) icon in the **Delete** column corresponding to the SQI whose transaction aggregation rule *y*ou want to delete.
   A message appears confirming whether you want to delete the transaction aggregation rule.
4. Click **OK**.
   The transaction aggregation rule is deleted.

Related Topics

For more information on...	See...
Transaction Aggregation Rule screen	Transaction Aggregation Rule on page 1279
Transaction Aggregation Rules zone	Transaction Aggregation Rules on page 1279

Schedule

The **Schedule** screen allows you to view, define, edit, and delete a schedule. It contains the following zone:

- Search Schedule on page 1282

Search Schedule

The **Search Schedule** zone allows you to search for a schedule using various search criteria. It contains the following two sections:

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- **Search Criteria** - The **Search Criteria** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Aggregation Schedule	Used to search for a particular schedule.	No
Description	Used to search schedules with a particular description	No

- **Search Results** - On clicking the **Search** button, the search results appear based on the specified search criteria. The **Search Results** section contains the following columns:

Column Name	Column Description
Aggregation Schedule	Displays the schedule.
Description	Displays the description of the schedule.
View	On clicking the **View** (🔗) icon, the **View Schedule UI Map** screen appears where you can view the details of the schedule.
Edit	On clicking the **Edit** (✎) icon, the **Edit Schedule** screen appears where you can edit the details of the schedule.
Delete	On clicking the **Delete** (🗑) icon, you can delete the schedule. **Note:** You can delete a schedule only when it is not yet used in the system.

By default, the **Filter** area is hidden. You can view the **Filter** area by clicking the **Filters** (▽) icon available in the upper right corner of this zone.

Related Topics

For more information on...	See...
How to search for a schedule	Searching for a Schedule on page 1283
How to view the details of a schedule	Viewing the Schedule Details on page 1284
How to define a schedule	Defining a Schedule on page 1284
How to edit a schedule	Editing a Schedule on page 1286
How to delete a schedule	Deleting a Schedule on page 1287

Searching for a Schedule

Procedure

To search for a schedule:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **S** and then click **Schedule**.
   The **Schedule** screen appears.
3. Enter the search criteria in the **Search Schedule** zone.

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> **Note:** ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.

4. Click **Search**.
   A list of schedules that meet the search criteria appears in the **Search Results** section.

Related Topics

For more information on...	See...
Schedule screen	Schedule on page 1282
Search Schedule zone	Search Schedule on page 1282

Viewing the Schedule Details

Procedure

To view the details of a schedule:

1. Search for the schedule in the **Schedule** screen.
2. In the **Search Results** section, click the **View** (🔗) icon in the **View** column corresponding to the schedule *w*hose details you want to view.
   The **View Schedule UI Map** screen appears.
3. View the details of the schedule in the **View Schedule UI Map** screen.

Related Topics

For more information on...	See...
How to search for a schedule	Searching for a Schedule on page 1283

Defining a Schedule

Prerequisites

To define a schedule, you should have:

- Schedule types defined in the application.

Procedure

To define a schedule:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **S** and then click **Schedule**.
   The **Schedule** screen appears.
3. Click the **Add** link in the upper right corner of the **Search Schedule** zone.

   The **Add/Edit Schedule UI Map** screen appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Aggregation Schedule	Used to specify the schedule code.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
Description	Used to specify the description for the schedule.	Yes

In addition, the **Add/Edit Schedule UI Map** screen contains the following two sections:

- **Schedule Periods** - Used to specify schedule periods for the schedule. It contains the following fields in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Start Date	Used to specify the start date of the schedule period. **Note:** The start date cannot be later than the end date.	Yes
End Date	Used to specify the end date of the schedule period. **Note:** The end date cannot be earlier than the start date.	Yes

Note: At least one schedule period must be defined for the schedule. Also, ensure that the schedule periods do not have overlapping days.

- **Schedule Types** - Used to associate schedule types with the schedule. It contains the following field in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Schedule Type	Used to indicate the functionality where you want to use the schedule. **Note:** You can associate multiple schedule types with a schedule.	Yes

4. Enter the required details in the **Add/Edit Schedule UI Map** screen.
5. If you want to define more than one schedule period for the schedule, click the **Add** (+) icon corresponding to the schedule period and then specify the *d*etails.

Note: However, if you want to remove a schedule period from the schedule, click the **Delete** (🗑) icon corresponding to the schedule period.

6. Similarly, If you want to associate more than one schedule type with the schedule, click the **Add** (+) icon corresponding to the schedule type and then specify the *d*etails.

Note: However, if you want to remove a schedule type from the schedule, click the **Delete** (🗑) icon corresponding to the schedule type.

7. Click **Save**.
   The schedule is defined.

Related Topics

For more information on...	See...
Schedule screen	Schedule on page 1282
Search Schedule zone	Search Schedule on page 1282

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Editing a Schedule

Prerequisites

To edit a schedule, you should have:

- Schedules (which you want to edit) defined in the application
- Schedule types defined in the application.

Procedure

To edit a schedule:

1. Search for the schedule in the **Schedule** screen.
2. In the **Search Results** section, click the **Edit** (✎) icon in the **Edit** column corresponding to the schedule *w*hose details you want to edit.

   The **Add/Edit Schedule UI Map** screen appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Schedule	Displays the schedule code.	Not applicable
Description	Used to specify the description for the schedule.	Yes

   In addition, this screen contains the following two sections:

   - **Schedule Periods** - Used to add, edit, or delete the schedule periods from the schedule. It contains the following fields in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Start Date	Used to specify the start date of the schedule period. **Note:** The start date cannot be later than the end date.	Yes
End Date	Used to specify the end date of the schedule period. **Note:** The end date cannot be earlier than the start date.	Yes

   - **Schedule Types** - Used to associate or disassociate schedule types from the schedule. It contains the following field in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Schedule Type	Used to indicate the functionality where you want to use the schedule.	Yes

3. Modify the required details in the **Add/Edit Schedule UI Map** screen.
4. Click **Save**.
   The changes made to the schedule are saved.

Related Topics

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For more information on...	See...
How to search for a schedule	Searching for a Schedule on page 1283

Deleting a Schedule

Procedure

To delete a schedule:

1. Search for the schedule in the **Schedule** screen.
2. In the **Search Results** section, click the **Delete** (🗑) icon in the **Delete** column corresponding to the schedule that you want to delete.
   A message appears confirming whether you want to delete the schedule.

> **Note:** You can delete a schedule only when it is not yet used in the system.

3. Click **OK**.
   The schedule is deleted.

Related Topics

For more information on...	See...
How to search for a schedule	Searching for a Schedule on page 1283

Disaggregation Request

Oracle Revenue Management and Billing allows you to create disaggregation request of a person, account, price item, price assignment, billable charge, and parent accumulation group. You can create disaggregation request through either of the following:

- Disaggregation Request from User Interface
- Disaggregation Request through the C1-DISTG Batch
- Disaggregation Request through Audit Event

Disaggregation Request from User Interface

Oracle Revenue Management and Billing enables you to manually create a disaggregation request for an account from the user interface in various ways. For more information, refer to Disaggregation Request on page 1289.

Disaggregation Request through the C1-DISTG Batch

Oracle Revenue Management and Billing enables you to manually create a disaggregation request for an account through the **Disaggregation Request Creation (C1-DISTG)** batch. For more information about the batch, refer to *Oracle Revenue Management and Billing Transaction Feed Management (TFM) - Batch Execution Guide*.

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Disaggregation Request through Audit Event

Until now, the system enabled you to disaggregate transactions when a disaggregation request was created for an account. The system enabled you to manually create a disaggregation request for an account from the user interface. Now, the system enables you to automatically create a disaggregation request for an account through an audit event. The system enables you to create an automatic disaggregation request in the following scenarios:

- While changing the person's attributes (i.e. when a person's fields or characteristics are updated)
- While changing the account's attributes (i.e. when an account's fields or characteristics are updated)
- While adding or updating a price list
- While assigning a price list to a person or an account
- While updating the price list assignment of a person or an account
- While assigning a price item to a person, account, or price list
- While updating the price assignment of a person, account, or price list

To enable the automatic disaggregation request creation, you need to do the following:

- Attach the **C1-REAUDEVNT** algorithm to the **Audit** system event of the **C1_PERSON_BO**, **C1_PLASGNEDIT**, **C1_PRICEASGN_BO**, **C1_F_ADDPLBO**, or **C1-AccountBO** business object, respectively
- Set the **Eligible for Audit Event** option type of the entity business object to **Y**
- Define an active audit event type for the entity business object in the system

For more information on how to create an audit event type, refer to the **Entity Audit** section in *Oracle Revenue Management and Billing Banking User Guide* or *Oracle Revenue Management and Billing Insurance User Guide.*

If the **C1-REAUDEVNT** algorithm is attached to the **Audit** system event of a business object, it is invoked whenever you create, edit, or delete the respective entity. It checks whether an active audit event type exists for the entity business object. If so, it considers the active audit event type and creates the audit event using the respective audit event type. The system creates the audit event while:

- Creating an entity when the **Add Action** option is selected in the audit event type
- Editing an entity when the **Update All** option is selected in the audit event type or when the updated element is listed in the **Audit Elements for Entity Update** section
- Deleting an entity when the **Delete Action** option is selected in the audit event type

The entity type and entity ID for which an audit event is created are added corresponding to the audit event in the **C1_AUDIT_EVENT** table. In addition, the effective date is stamped corresponding to the audit event in the **C1_AUDIT_EVENT** table. Note that if the entity has a start date, then the effective date is set to the entity's start date. But, if the entity does not have a start date, then the effective date is set to the system date.

Note: Before creating an audit event, the system checks whether an audit event for the entity ID with the same effective date already exists in the **Pending** or **Error** status for the respective action. If so, the system does not create a new audit event for the entity. Instead, the system adds a new log entry in the existing audit event.

Once the audit event is created in the **Pending** status, you need to execute the **Disaggregation Request through Audit Event (C1-DISTA)** batch. Until now, the **Disaggregation Request through Audit Event (C1-DISTA)** batch was used to process audit events which are created for a self-funded pricing rule. Now, this batch is used to process the audit events which are created for the persons, accounts, self-funded pricing rules, price lists, price list assignments, and price assignments.

Once a disaggregation request is created for an audit event, you need to execute the following batches in the specified sequence:

1. Pending Bill Segments Deletion (C1-BSEGD)
2. Pending Bill Deletion (C1-PNBD)
3. Identify Transactions for Disaggregation (C1-IDENT)
4. Process Non-Aggregated Transactions (C1-PDTXN)
5. Clean Up (C1-TXNCU) with the **Request Type** parameter set to **DISAGG**

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6. Update Disaggregation Request Status (C1-DRSUA)

Disaggregation Request

Through the **Disaggregation Request Creation (C1-DISTG)** batch, you can only create a disaggregation request for an account. However, from the **Disaggregation Request** screen, you can create a disaggregation request for a person, account, price item, price assignment, billable charge, and parent accumulation group. When you create a disaggregation request for a person, the system does not create the disaggregation request for the person. Instead, the system creates the disaggregation request for all accounts of the person (where the person is the main customer) and its child persons.

The **Disaggregation Request** screen allows you to search for disaggregation requests using various search criteria. It also allows you to create and delete a disaggregation request. It contains the following zone:

- Search Disaggregation Request on page 1289

Search Disaggregation Request

The **Search Disaggregation Request** zone allows you to search for a disaggregation request using various search criteria. It contains the following two sections:

- **Search Criteria** - The **Search Criteria** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Search By	Used to indicate whether you want to search for a disaggregation request using the person, account, or accumulation group details. The valid values are: • Person • Account • Accumulation Group **Note:** By default, the **Person** option is selected.	Yes
Person ID	Used to search disaggregation requests which are created for accounts of a particular person. **Note:** This field appears only when the **Person** option is selected from the **Search By** list.	No
Division	Used to search disaggregation requests which are created for accounts belonging to a particular division. **Note:** You can only view those divisions to which you have access in the **Division** list. This field appears only when the **Person** or **Account** option is selected from the **Search By** list.	Yes (Conditional) **Note:** This field is required while searching for a disaggregation request using the account details.
Person Name	Used to search disaggregation requests which are created for accounts belonging to persons with a particular name.	No

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Field Name	Field Description	Mandatory (Yes or No)
	Note: This field appears only when the **Person** option is selected from the **Search By** list.	
Request Source	Used to search disaggregation requests which are created using a particular process. The valid values are: • AUTOMATIC • BATCH • MANUAL	No
Person Identifier Type	Used to indicate the person identifier type based on which you want to search disaggregation requests created for a person. **Note:** This field appears when the **Person** option is selected from the **Search By** list.	Yes (Conditional) **Note:** If you specify the person identifier as a search criteria, you have to select the person identifier type.
Person Identifier	Used to specify the value for the person identifier type based on which you want to search disaggregation requests created for a person. **Note:** This field appears only when the **Person** option is selected from the **Search By** list.	Yes (Conditional) **Note:** If you specify the person identifier type as a search criteria, you have to specify the person identifier.
Request Created From	Used to search disaggregation requests which are created from a particular date onwards.	Yes (Conditional) **Note:** This field is required while searching for a disaggregation request using the person or account details.
Request Created Until	Used to search disaggregation requests which are created till a particular date.	Yes (Conditional) **Note:** This field is required while searching for a disaggregation request using the person or account details.
From Processing Date	Used to search disaggregation requests which are processed from a particular date onwards.	No
To Processing Date	Used to search disaggregation requests which are processed till a particular date.	No
Request Type	Used to search disaggregation requests with a particular request type. The valid values are: • **Account** - Used to search disaggregation requests which are created for accounts. • **Billable Charge** - Used to search disaggregation requests which are created for billable charges.	No

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Field Name	Field Description	Mandatory (Yes or No)
	• **Person** - Used to search disaggregation requests which are created for all the accounts of a person. • **Price Assignment** - Used to search disaggregation requests which are created for price assignments. • **Price Item** - Used to search disaggregation requests which are created for price items. **Note:** This field appears only when the **Person** or **Account** option is selected from the **Search By** list.	
Request Status	Used to search disaggregation requests which are in a particular status. The valid values are: • COMPLETE • PENDING	No
Price Item	Used to search disaggregation request for an account or for one or more accounts of a person and its child persons where a particular price item is assigned. **Note:** This field appears only when the **Person** or **Account** option is selected from the **Search By** list.	No
Billable Charge ID	Used to search disaggregation request for an account for which a particular billable charge is created. **Note:** This field appears only when the **Person** or **Account** option is selected from the **Search By** list.	No
Price Assignment ID	Used to search disaggregation request for an account with a particular price assignment. **Note:** This field appears only when the **Person** or **Account** option is selected from the **Search By** list.	No
Account ID	Used to search disaggregation requests which are created for a particular account. **Note:** This field appears only when you select the **Account** option from the **Search By** list.	No
Account Identifier Type	Used to indicate the account identifier type based on which you want to search disaggregation requests created for an account.	Yes (Conditional)

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Field Name	Field Description	Mandatory (Yes or No)
	Note: This field appears when you select the **Account** option from the **Search By** list.	**Note:** If you specify the account identifier as a search criteria, you have to select the account identifier type.
Account Identifier	Used to specify the value for the account identifier type based on which you want to search disaggregation requests created for an account. **Note:** This field appears only when you select the **Account** option from the **Search By** list.	Yes (Conditional) **Note:** If you specify the account identifier type as a search criteria, you have to specify the account identifier.
Accumulation Type	Used to indicate the accumulation type based on which you want to search disaggregation requests created for an accumulation group. **Note:** This field appears only when you select the **Accumulation Group** option from the **Search By** list.	No
Parent Accumulation Group ID	Used to search disaggregation requests created for a particular parent accumulation group. **Note:** This field appears only when you select the **Accumulation Group** option from the **Search By** list.	No

- **Search Results** - On clicking the **Search** button, the search results appear based on the specified search criteria. The **Search Results** section contains the following columns:

Column Name	Column Description
Request ID	Displays the disaggregation request ID.
Request Creation Date	Displays the date when the disaggregation request is created.
Status	Indicates the status of the disaggregation request. The valid values are: • COMPLETE • PENDING
Account ID	Indicates the account for which the disaggregation request is created.
Person ID	Indicates the person for whom the disaggregation request is created.
Person Information	Displays the concatenated string of information about the person separated by a comma (,). In addition, a context menu appears corresponding to this field which helps in navigating to other screens in the application. **Note:** It has a link. On clicking the link, the **Person** screen appears with the details of the respective person.
Account Information	Displays the concatenated string of information about the account separated by a comma (,). In addition, a context menu appears corresponding to this field which helps in navigating to other screens in the application.

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Column Name	Column Description
	Note: It has a link. On clicking the link, the **Account** screen appears with the details of the respective account. This column appears only when you select the **Account** option from the **Search By** list.
Processing Date	Displays the date when the disaggregation request is processed.
Request Type	Displays the request type based on which the disaggregation request is processed. The valid values are: • **Account** - Indicates that the disaggregation request is created for an account. • **Billable Charge** - Indicates that the disaggregation request is created for a billable charge. • **Person** - Indicates that the disaggregation request is created for a all the accounts of a person. • **Price Assignment** - Indicates that the disaggregation request is created for a price assignment. • **Price Item** - Indicates that the disaggregation request is created for a price item.
Price Item Information	Displays the concatenated string of information about the price item for which the disaggregation request is created separated by a comma (,). **Note:** It has a link. On clicking the link, the **Price Item** screen appears where you can view the details of the respective price item. The information in this column appears only when the disaggregation request is created for a price item
Pricing Information	Displays the pricing details using which the disaggregation request is processed. **Note:** It has a link. On clicking the link, the **Pricing** screen appears where you can view the details of the respective pricing.
Billable Charge ID	Displays the charge id billable for the processed disaggregation request. **Note:** It has a link. On clicking the link, the **Billable Charge ID** screen appears where you can view the details of the respective billable charge.
Delete	On clicking the **Delete** (🗑) icon, you can delete the disaggregation request. **Note:** You can delete a disaggregation request only when it is in the **Pending** status.
Accumulation Information	Displays the accumulation information. **Note:** This column appears only when you select the **Accumulation Group** option from the **Search By** list.

Note: Pagination is used to display limited number of records in this zone. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

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Related Topics

For more information on...	See...
How to search for a disaggregation request	Searching for a Disaggregation Request on page 1294
How to delete a disaggregation request	Deleting a Disaggregation Request on page 1319

Searching for a Disaggregation Request

Procedure

To search for a disaggregation request:

1. Click the **Menu** link in the **Application** toolbar.
   A list appears.
2. From the **Main** menu, select **Transaction and Audit Event Management** and then click **Disaggregation Request**.
   The **Disaggregation Request** screen appears.
3. Enter the search criteria in the **Search Disaggregation Request** zone.

   Note: ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.
4. Click **Search**.

   A list of disaggregation requests that meet the search criteria appears in the **Search Results** section.

Related Topics

For more information on...	See...
Disaggregation Request screen	Disaggregation Request on page 1289
Search Disaggregation Request zone	Search Disaggregation Request on page 1289

Creating a Disaggregation Request for a Person

Prerequisites

To create a disaggregation request for a person, you should have:

- Person (for whom you want to create the disaggregation request) defined in the application
- Person associated with the division to which the user belongs
- Price list assigned to the person (in case you want to search a person based on an assigned price list)

Procedure

To create a disaggregation request for a person:

1. Click the **Menu** link in the **Application** toolbar.
   A list appears.
2. From the **Main** menu, select **Transaction and Audit Event Management** and then click **Disaggregation Request**.
   The **Disaggregation Request** screen appears.
3. Click the **Add** button available in the upper right corner of the **Disaggregation Request** screen.

   The **Add Disaggregation Request** screen appears. It contains the following field:

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Field Name	Field Description	Mandatory (Yes or No)
Disaggregation Request Type	Used to indicate the entity for which you want to create a disaggregation request. The valid values are: • **Account** - Used to create a disaggregation request for an account. **Note:** In this case, the system will disaggregate all billable charges of the account. • **Billable Charge** - Used to create a disaggregation request for an account for which a particular billable charge is created. **Note:** In this case, the system will disaggregate a specific billable charge of the account. • **Parent Accumulation Group** - Used to create reseeding requests for the accounts using a parent accumulation group and by specifying the accumulation type (i.e. whether it is stop-loss or discount arrangement). **Note:** The **Parent Accumulation Group** option is used to create reseeding requests for accounts which belong to the healthcare domain. • **Person** - Used to create a disaggregation request for one or more accounts of a person and its child persons. **Note:** In this case, the system will disaggregate all billable charges of the account. • **Price Assignment** - Used to create a disaggregation request for an account with a particular price assignment. **Note:** In this case, the system will disaggregate only those billable charges of the account which are created using the respective price assignment. • **Price Item** - Used to create a disaggregation request for an account or for one or more accounts of a person and its child persons where a particular price item is assigned. **Note:** In this case, the system will disaggregate only those billable charges of the accounts which are created for the respective price item.	Yes

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4. Select the **Person** option from the **Disaggregation Request Type** list.
5. Click **OK**.

   The **Add Disaggregation Request For Person** screen appears. It contains the following two sections:

   - **Search Criteria** - Used to search for a person and its child persons for whose accounts you want to create a disaggregation request. It contains the following fields:

Filed Name	Field Description	Mandatory (Yes or No)
Request Type	Indicates the entity for which you want to create the disaggregation request. The valid value is: • Person	Not applicable
Division	Used to search persons which belong to a particular division. **Note:** You can view only those divisions to which you have access in the **Division** list.	Yes
Person ID	Used to search for a particular person. **Note:** The **Search** (🔍) icon appears corresponding to the **Person ID** field. On clicking the **Search** icon, the **Person Search** window appears where you can search for the person.	No
Person Name	Used to search persons having a particular name.	No
Person Identifier Type	Used to indicate the person identifier type based on which you want to search for a person.	Yes (Conditional) **Note:** If you specify the person identifier as a search criteria, you have to select the person identifier type.
Person Identifier	Used to specify the value of the person identifier type using which you want to search for a person.	Yes (Conditional) **Note:** If you select the person identifier type as a search criteria, you have to specify the person identifier.
Price List Assignment Start Date	Used to search for a person based on an assigned price list which is effective from a particular date onwards.	Yes (Conditional) **Note:** If you specify the price list assignment end date or the assigned price list as a search criteria, you have to specify the price list assignment start date.
Price List Assignment End Date	Used to search for a person based on an assigned price list which is effective till a particular date.	Yes (Conditional)

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Filed Name	Field Description	Mandatory (Yes or No)
		Note: If you specify the price list assignment start date or the assigned price list as a search criteria, you have to specify the price list assignment end date.
Assigned Price List	Used when you want to search for a person to which a particular price list is assigned. **Note:** The **Search** (🔍) icon appears corresponding to the **Assigned Price List** field. On clicking the **Search** icon, the **Price List Search** window appears where you can search for the price list.	Yes (Conditional) **Note:** If you specify the price list assignment start date or the price list assignment end date as a search criteria, you have to specify the assigned price list.
Price Assignment ID	Used to search for a person to whom a particular price item pricing is assigned.	No
Price Item	Used to search for persons to whom a particular price item is assigned. **Note:** The **Search** (🔍) icon appears corresponding to the **Price Item** field. On clicking the **Search** icon, the **Price Item Search** window appears where you can search for the price item. On specifying the price item, the details of the price item appears corresponding to the **Price Item** field.	No
Billable Charge ID	Used to search for a person for whose accounts a particular billable charge is created. **Note:** The **Search** (🔍) icon appears corresponding to the **Billable Charge ID** field. On clicking the **Search** icon, the **Billable Charge Search** window appears where you can search for the billable charge. On specifying the billable charge, the details of the billable charge appears corresponding to the **Billable Charge ID** field.	No

- **Search Results** - On clicking the **Search** button, the search results appear based on the specified search criteria. The **Search Results** section contains the following columns:

Column Name	Column Description
Account Identifier Type	Indicates the account identifier type using which the account is defined in the system.

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Column Name	Column Description
	Note: The data appears in this column when you search for an account.
Account Identifier	Displays the value of the account identifier type. **Note:** The data appears in this column when you search for an account.
Division	Displays the division to which the person belongs.
Person Identifier Type	Indicates the person identifier type using which the person is defined in the system.
Person Identifier	Displays the value of the person identifier type.
Person Name	Displays the name of the person.
Assigned Price List	Displays the price list assigned to the person. **Note:** The data appears in this column when you search for a person based on an assigned price list.
Price List Assignment Start Date	Displays the date from when the price list is assigned to the person. **Note:** The data appears in this column when you search for a person based on an assigned price list.
Price List Assignment End Date	Displays the date till when the price list is assigned to the person. **Note:** The data appears in this column when you search for a person based on an assigned price list.
Account Information	Displays the concatenated string of information about the account separated by a comma (,). **Note:** The data appears in this column when you search for an account.
Bill Cycle	Indicates the bill cycle defined for the account. **Note:** The data appears in this column when you search for an account.

Note:

Pagination is used to display limited number of records in the **Search Results** section. By default, 20 records are displayed in the **Search Results** section. You can change the number of records displayed per page from the **Page Limit** list, if required.

The**Page Limit** list includes only those values which are defined in the **PAGE_NUMBER** lookup field.

You can use the navigation buttons, such as **First** (<<), **Previous** (<), **Next** (>), and **Last** (>>) to navigate between pages. You can also select the page to which you want to navigate from the **Go To** list.

ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.

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6. Do either of the following:

If you want to...	Then...
Create disaggregation request for one or more persons	**a.** In the **Search Results** section, select the check box corresponding to the person for which you want to create a disaggregation request. **b.** Click **Disaggregate**. A message appears confirming that the disaggregation request is created successfully. **c.** Click **OK**. The disaggregation request is created for each account of the person (where the person is the main customer) and its child persons.
Create disaggregation request for all persons that meet the search criteria	**a.** Click **Disaggregate All**. The **Disaggregate All Confirmation** window appears confirming whether you want to create disaggregation requests for all records. **b.** Click **OK**. The disaggregation request is created for each account of the person (where the person is the main customer) and its child persons.

Related Topics

For more information on...	See...
Disaggregation Request screen	Disaggregation Request on page 1289
Search Disaggregation Request zone	Search Disaggregation Request on page 1289

Creating a Disaggregation Request for an Account

Prerequisites

To create a disaggregation request for an account, you should have:

- Account (for whom you want to create the disaggregation request) defined in the application
- Account associated with the division to which the user belongs
- Price list assigned to the account (in case you want to search an account based on an assigned price list)

Procedure

To create a disaggregation request for an account:

1. Click the **Menu** link in the **Application** toolbar.
   A list appears.
2. From the **Main** menu, select **Transaction and Audit Event Management** and then click **Disaggregation Request**.
   The **Disaggregation Request** screen appears.
3. Click the **Add** button available in the upper right corner of the **Disaggregation Request** screen.

   The **Add Disaggregation Request** screen appears. It contains the following field:

Field Name	Field Description	Mandatory (Yes or No)
Disaggregation Request Type	Used to indicate the entity for which you want to create a disaggregation request. The valid values are:	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	• **Account** - Used to create a disaggregation request for an account. **Note:** In this case, the system will disaggregate all billable charges of the account. • **Billable Charge** - Used to create a disaggregation request for an account for which a particular billable charge is created. **Note:** In this case, the system will disaggregate a specific billable charge of the account. • **Parent Accumulation Group** - Used to create reseeding requests for the accounts using a parent accumulation group and by specifying the accumulation type (i.e. whether it is stop-loss or discount arrangement). **Note:** The **Parent Accumulation Group** option is used to create reseeding requests for accounts which belong to the healthcare domain. • **Person** - Used to create a disaggregation request for one or more accounts of a person and its child persons. **Note:** In this case, the system will disaggregate all billable charges of the account. • **Price Assignment** - Used to create a disaggregation request for an account with a particular price assignment. **Note:** In this case, the system will disaggregate only those billable charges of the account which are created using the respective price assignment. • **Price Item** - Used to create a disaggregation request for an account or for one or more accounts of a person and its child persons where a particular price item is assigned. **Note:** In this case, the system will disaggregate only those billable charges of the accounts which are created for the respective price item.	

4. Select the **Account** option from the **Disaggregation Request Type** list.
5. Click **OK**.

   The **Add Disaggregation Request For Account** screen appears. It contains the following two sections:

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- **Search Criteria** - Used to search for an account for whose billable charges you want to create a disaggregation request. It contains the following fields:

Filed Name	Field Description	Mandatory (Yes or No)
Request Type	Indicates the entity for which you want to create the disaggregation request. The valid value is: • Account	Not applicable
Division	Used to search accounts which belong to a particular division. **Note:** You can view only those divisions to which you have access in the **Division** list.	Yes
Account ID	Used to search for a particular account. **Note:** The **Search** (🔍) icon appears corresponding to the **Account ID** field. On clicking the **Search** icon, the **Account Search** window appears where you can search for the account.	No
Bill Cycle	Used to search accounts having a particular bill cycle.	No
Account Identifier Type	Used to indicate the account identifier type based on which you want to search for an account.	Yes (Conditional) **Note:** If you specify the account identifier as a search criteria, you have to select the account identifier type.
Account Identifier	Used to specify the value of the account identifier type using which you want to search for an account.	Yes (Conditional) **Note:** If you select the account identifier type as a search criteria, you have to specify the account identifier.
Invoice Currency	Used to search accounts whose billable charges are defined using a particular invoice currency.	No
Assigned Price List	Used when you want to search for an account to which a particular price list is assigned. **Note:** The **Search** (🔍) icon appears corresponding to the **Assigned Price List** field. On clicking the **Search** icon, the **Price List Search** window appears where you can search for the price list.	Yes (Conditional) **Note:** If you specify the price list assignment start date or the price list assignment end date as a search criteria, you have to specify the assigned price list.

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Filed Name	Field Description	Mandatory (Yes or No)
Price List Assignment Start Date	Used to search for an account based on an assigned price list which is effective from a particular date onwards.	Yes (Conditional) **Note:** If you specify the price list assignment end date or the assigned price list as a search criteria, you have to specify the price list assignment start date.
Price List Assignment End Date	Used to search for an account based on an assigned price list which is effective till a particular date.	Yes (Conditional) **Note:** If you specify the price list assignment start date or the assigned price list as a search criteria, you have to specify the price list assignment end date.
Price Assignment ID	Used to search for an account to which a particular price item pricing is assigned.	No
Price Item	Used to search for accounts to which a particular price item is assigned. **Note:** The **Search** (🔍) icon appears corresponding to the **Price Item** field. On clicking the **Search** icon, the **Price Item Search** window appears where you can search for the price item. On specifying the price item, the details of the price item appears corresponding to the **Price Item** field.	No
Billable Charge ID	Used to search for an account for which a particular billable charge is created. **Note:** The **Search** (🔍) icon appears corresponding to the **Billable Charge ID** field. On clicking the **Search** icon, the **Billable Charge Search** window appears where you can search for the billable charge. On specifying the billable charge, the details of the billable charge appears corresponding to the **Billable Charge ID** field.	No

- **Search Results** - On clicking the **Search** button, the search results appear based on the specified search criteria. The **Search Results** section contains the following columns:

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Column Name	Column Description
Account Identifier Type	Indicates the account identifier type using which the account is defined in the system.
Account Identifier	Displays the value of the account identifier type.
Division	Displays the division to which the account belongs.
Person Identifier Type	Indicates the person identifier type using which the person is defined in the system. **Note:** The data appears in this column when you search for a person.
Person Identifier	Displays the value of the person identifier type. **Note:** The data appears in this column when you search for a person.
Person Name	Displays the name of the person to whom the account belongs.
Assigned Price List	Displays the price list assigned to the account. **Note:** The data appears in this column when you search for an account based on an assigned price list.
Price List Assignment Start Date	Displays the date from when the price list is assigned to the account. **Note:** The data appears in this column when you search for an account based on an assigned price list.
Price List Assignment End Date	Displays the date till when the price list is assigned to the account. **Note:** The data appears in this column when you search for an account based on an assigned price list.
Account Information	Displays the concatenated string of information about the account separated by a comma (,).
Bill Cycle	Indicates the bill cycle defined for the account.

Note:

Pagination is used to display limited number of records in the **Search Results** section. By default, 20 records are displayed in the **Search Results** section. You can change the number of records displayed per page from the **Page Limit** list, if required.

The**Page Limit** list includes only those values which are defined in the **PAGE_NUMBER** lookup field.

You can use the navigation buttons, such as **First** (<<), **Previous** (<), **Next** (>), and **Last** (>>) to navigate between pages. You can also select the page to which you want to navigate from the **Go To** list.

ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.

6. Do either of the following:

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If you want to...	Then...
Create disaggregation request for one or more accounts	**a.** In the **Search Results** section, select the check box corresponding to the account for which you want to create a disaggregation request. **b.** Click **Disaggregate**. A message appears confirming that the disaggregation request is created successfully. **c.** Click **OK**. The disaggregation request is created for the selected account.
Create disaggregation request for all accounts that meet the search criteria	**a.** Click **Disaggregate All**. The **Disaggregate All Confirmation** window appears confirming whether you want to create disaggregation requests for all records. **b.** Click **OK**. The disaggregation request is created for all the accounts.

Related Topics

For more information on...	See...
Disaggregation Request screen	Disaggregation Request on page 1289
Search Disaggregation Request zone	Search Disaggregation Request on page 1289

Creating a Disaggregation Request for a Price item

Prerequisites

To create a disaggregation request for a price item, you should have:

- Price item (for which you want to create the disaggregation request) defined in the application
- Price item associated with the division to which the user belongs
- Person or accounts defined in the application (in case you want to search for a price item associated to a person or an account)
- Price item associated with the price list (in case you want to search a price item based on an assigned price list)

Procedure

To create a disaggregation request for a price item:

1. Click the **Menu** link in the **Application** toolbar.
   A list appears.
2. From the **Main** menu, select **Transaction and Audit Event Management** and then click **Disaggregation Request**.
   The **Disaggregation Request** screen appears.
3. Click the **Add** button available in the upper right corner of the **Disaggregation Request** screen.

   The **Add Disaggregation Request** screen appears. It contains the following field:

Field Name	Field Description	Mandatory (Yes or No)
Disaggregation Request Type	Used to indicate the entity for which you want to create a disaggregation request. The valid values are: • **Account** - Used to create a disaggregation request for an account.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	Note: In this case, the system will disaggregate all billable charges of the account. • **Billable Charge** - Used to create a disaggregation request for an account for which a particular billable charge is created. **Note:** In this case, the system will disaggregate a specific billable charge of the account. • **Parent Accumulation Group** - Used to create reseeding requests for the accounts using a parent accumulation group and by specifying the accumulation type (i.e. whether it is stop-loss or discount arrangement). **Note:** The **Parent Accumulation Group** option is used to create reseeding requests for accounts which belong to the healthcare domain. • **Person** - Used to create a disaggregation request for one or more accounts of a person and its child persons. **Note:** In this case, the system will disaggregate all billable charges of the account. • **Price Assignment** - Used to create a disaggregation request for an account with a particular price assignment. **Note:** In this case, the system will disaggregate only those billable charges of the account which are created using the respective price assignment. • **Price Item** - Used to create a disaggregation request for an account or for one or more accounts of a person and its child persons where a particular price item is assigned. **Note:** In this case, the system will disaggregate only those billable charges of the accounts which are created for the respective price item.	

4. Select the **Price Item** option from the **Disaggregation Request Type** list.
5. Click **OK**.

The **Add Disaggregation Request For Price Item** screen appears. It contains the following two sections:

- **Search Criteria** - Used to search for a price item assigned to an account for whose billable charges want to create a disaggregation request. It contains the following fields:

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Filed Name	Field Description	Mandatory (Yes or No)
Request Type	Indicates the entity for which you want to create the disaggregation request. The valid value is: • Price Item	Not applicable
Division	Used to search price items which belong to a particular division. **Note:** You can view only those divisions to which you have access in the **Division** list.	Yes
Account ID	Used to search price items which are assigned to a particular account. **Note:** The **Search** (🔍) icon appears corresponding to the **Account ID** field. On clicking the **Search** icon, the **Account Search** window appears where you can search for the account.	Yes (Conditional) **Note:** This field is required when you specify the price item in the **Price Item** field as a search criteria.
Person ID	Used to search price items which are assigned to a particular person. **Note:** The **Search** (🔍) icon appears corresponding to the **Person ID** field. On clicking the **Search** icon, the **Person Search** window appears where you can search for the person.	Yes (Conditional) **Note:** This field is required when you specify the price item in the **Price Item** field as a search criteria.
Account Identifier Type	Used to search price items assigned to accounts which are created using a particular identifier type.	Yes (Conditional) **Note:** If you specify the account identifier as a search criteria, you have to select the account identifier type.
Account Identifier	Used to specify the value of the account identifier type.	Yes (Conditional) **Note:** If you select the account identifier type as a search criteria, you have to specify the account identifier.
Person Identifier Type	Used to search price items assigned to persons which are created using a particular identifier type.	Yes (Conditional) **Note:** If you specify the person identifier as a search criteria, you have to select the person identifier type.
Person Identifier	Used to specify the value of the person identifier type.	Yes (Conditional)

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Filed Name	Field Description	Mandatory (Yes or No)
		Note: If you select the person identifier type as a search criteria, you have to specify the person identifier.
Bill Cycle	Used to search price items assigned to accounts or accounts of a person having a particular bill cycle.	No
Invoice Currency	Used to search price items assigned to accounts or accounts of a person whose billable charges are defined using a particular invoice currency.	No
Price Item	Used to search for a particular price item. **Note:** The **Search** (🔍) icon appears corresponding to the **Price Item** field. On clicking the **Search** icon, the **Price Item Search** window appears where you can search for the price item. On specifying the price item, the details of the price item appears corresponding to the **Price Item** field.	Yes
Assigned Price List	Used to search price items which belong to a price list assigned to accounts or accounts of a person. **Note:** The **Search** (🔍) icon appears corresponding to the **Assigned Price List** field. On clicking the **Search** icon, the **Price List Search** window appears where you can search for the price list.	Yes (Conditional) **Note:** If you specify the price list assignment start date or the price list assignment end date as a search criteria, you have to specify the assigned price list.
Price List Assignment Start Date	Used to search for price items based on an assigned price list which is effective from a particular date onwards.	Yes (Conditional) **Note:** If you specify the price list assignment end date or the assigned price list as a search criteria, you have to specify the price list assignment start date.
Price List Assignment End Date	Used to search for price items based on an assigned price list which is effective till a particular date.	Yes (Conditional) **Note:** If you specify the price list assignment start date or the assigned price list as a search criteria, you have to specify the price list assignment end date.

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- **Search Results** - On clicking the **Search** button, the search results appear based on the specified search criteria. The **Search Results** section contains the following columns:

Column Name	Column Description
Account Identifier Type	Indicates the account identifier type using which the account is defined in the system. **Note:** The data appears in this column when you search for a price item which is assigned to an account.
Account Identifier	Displays the value of the account identifier type. **Note:** The data appears in this column when you search for a price item which is assigned to an account.
Division	Displays the division to which the price item belongs.
Person Identifier Type	Indicates the person identifier type using which the person is defined in the system. **Note:** The data appears in this column when you search for a price item which is assigned to a person.
Person Identifier	Displays the value of the person identifier type. **Note:** The data appears in this column when you search for a price item which is assigned to a person.
Person Name	Displays the name of the person.
Assigned Price List	Displays the assigned price list of the account or the account of a person to which the price item is associated. **Note:** The data appears in this column when you search for a price item based on an assigned price list.
Price List Assignment Start Date	Displays the date from when the price list is assigned to the account or the account of a person. **Note:** The data appears in this column when you search for a price item based on an assigned price list.
Price List Assignment End Date	Displays the date till when the price list is assigned to the account or the account of a person. **Note:** The data appears in this column when you search for a price item based on an assigned price list.
Account Information	Displays the concatenated string of information about the account separated by a comma (,).
Bill Cycle	Indicates the bill cycle defined for the account or accounts of the person to which the price item is assigned.

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> **Note:**
>
> Pagination is used to display limited number of records in the **Search Results** section. By default, 20 records are displayed in the **Search Results** section. You can change the number of records displayed per page from the **Page Limit** list, if required.
>
> The**Page Limit** list includes only those values which are defined in the **PAGE_NUMBER** lookup field.
>
> You can use the navigation buttons, such as **First** (<<), **Previous** (<), **Next** (>), and **Last** (>>) to navigate between pages. You can also select the page to which you want to navigate from the **Go To** list.
>
> ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.

6. Do either of the following:

If you want to...	Then...
Create disaggregation request for one or more price items	**a.** In the **Search Results** section, select the check box corresponding to the person or account for which you want to create a disaggregation request. **b.** Click **Disaggregate**. A message appears confirming that the disaggregation request is created successfully. **c.** Click **OK**. The disaggregation request is created for the selected price item.
Create disaggregation request for all price items that meet the search criteria	**a.** Click **Disaggregate All**. The **Disaggregate All Confirmation** window appears confirming whether you want to create disaggregation requests for all records. **b.** Click **OK**. The disaggregation request is created for all the price items.

Related Topics

For more information on...	See...
Disaggregation Request screen	Disaggregation Request on page 1289
Search Disaggregation Request zone	Search Disaggregation Request on page 1289

Creating a Disaggregation Request for a Price Assignment

Prerequisites

To create a disaggregation request for a price assignment, you should have:

- Price item pricing (whose disaggregation request you want to create) assigned to the account or the accounts of a person or child person

Procedure

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To create a disaggregation request for a price assignment:

1. Click the **Menu** link in the **Application** toolbar.
   A list appears.
2. From the **Main** menu, select **Transaction and Audit Event Management** and then click **Disaggregation Request**.
   The **Disaggregation Request** screen appears.
3. Click the **Add** button available in the upper right corner of the **Disaggregation Request** screen.

   The **Add Disaggregation Request** screen appears. It contains the following field:

Field Name	Field Description	Mandatory (Yes or No)
Disaggregation Request Type	Used to indicate the entity for which you want to create a disaggregation request. The valid values are: • **Account** - Used to create a disaggregation request for an account. **Note:** In this case, the system will disaggregate all billable charges of the account. • **Billable Charge** - Used to create a disaggregation request for an account for which a particular billable charge is created. **Note:** In this case, the system will disaggregate a specific billable charge of the account. • **Parent Accumulation Group** - Used to create reseeding requests for the accounts using a parent accumulation group and by specifying the accumulation type (i.e. whether it is stop-loss or discount arrangement). **Note:** The **Parent Accumulation Group** option is used to create reseeding requests for accounts which belong to the healthcare domain. • **Person** - Used to create a disaggregation request for one or more accounts of a person and its child persons. **Note:** In this case, the system will disaggregate all billable charges of the account. • **Price Assignment** - Used to create a disaggregation request for an account with a particular price assignment. **Note:** In this case, the system will disaggregate only those billable charges of the account which are created using the respective price assignment.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	• **Price Item** - Used to create a disaggregation request for an account or for one or more accounts of a person and its child persons where a particular price item is assigned. **Note:** In this case, the system will disaggregate only those billable charges of the accounts which are created for the respective price item.	

4. Select the **Price Assignment** option from the **Disaggregation Request Type** list.
5. Click **OK**.

The **Add Disaggregation Request For Price Assignment** screen appears. It contains the following two sections:

- **Search Criteria** - Used to search for an account with a particular price assignment for which you want to create a disaggregation request. It contains the following fields:

Filed Name	Field Description	Mandatory (Yes or No)
Request Type	Indicates the entity for which you want to create the disaggregation request. The valid value is: • Price Assignment	Not applicable
Price Assignment ID	Used to search for an account to which a particular price item pricing is assigned.	Yes

- **Search Results** - On clicking the **Search** button, the search results appear based on the specified search criteria. The **Search Results** section contains the following columns:

Column Name	Column Description
Account Identifier Type	Indicates the account identifier type using which the account is defined in the system. **Note:** The data appears in this column when the price assignment belongs to an account.
Account Identifier	Displays the value of the account identifier type. **Note:** The data appears in this column when the price assignment belongs to an account.
Division	Displays the division to which the account belongs.
Person Identifier Type	Indicates the person identifier type using which the person is defined in the system. **Note:** The data appears in this column when the price assignment belongs to a persons account.
Person Identifier	Displays the value of the person identifier type. **Note:** The data appears in this column when the price assignment belongs to a persons account.

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Column Name	Column Description
Person Name	Displays the name of the person to whom the account belongs.
Assigned Price List	Displays the price list assigned to the account. **Note:** The data appears in this column when the price item pricing is assigned through a price list.
Price List Assignment Start Date	Displays the date from when the price list is assigned to the account. **Note:** The data appears in this column when the price item pricing is assigned through a price list.
Price List Assignment End Date	Displays the date till when the price list is assigned to the account. **Note:** The data appears in this column when the price item pricing is assigned through a price list.
Account Information	Displays the concatenated string of information about the account separated by a comma (,).
Bill Cycle	Indicates the bill cycle defined for the account.

Note:

Pagination is used to display limited number of records in the **Search Results** section. By default, 20 records are displayed in the **Search Results** section. You can change the number of records displayed per page from the **Page Limit** list, if required.

The**Page Limit** list includes only those values which are defined in the **PAGE_NUMBER** lookup field.

You can use the navigation buttons, such as **First** (<<), **Previous** (<), **Next** (>), and **Last** (>>) to navigate between pages. You can also select the page to which you want to navigate from the **Go To** list.

ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.

6. Do either of the following:

If you want to...	Then...
Create disaggregation request for price assignment of one or more accounts	**a.** In the **Search Results** section, select the check box corresponding to the account for which you want to create a disaggregation request. **b.** Click **Disaggregate**. A message appears confirming that the disaggregation request is created successfully. **c.** Click **OK**. The disaggregation request is created for the price assignment of the selected account.
Create disaggregation request for all accounts that meet the search criteria	**a.** Click **Disaggregate All**.

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If you want to...	Then...
	The **Disaggregate All Confirmation** window appears confirming whether you want to create disaggregation requests for all records. **b.** Click **OK**. The disaggregation request is created for all the price assignments of all accounts.

Related Topics

For more information on...	See...
Disaggregation Request screen	Disaggregation Request on page 1289
Search Disaggregation Request zone	Search Disaggregation Request on page 1289

Creating a Disaggregation Request for a Billable Charge

Prerequisites

To create a disaggregation request for a billable charge, you should have:

- Billable charge (for which you want to create a disaggregation request) created for the account or accounts of the person or child persons

Procedure

To create a disaggregation request for a billable charge:

1. Click the **Menu** link in the **Application** toolbar.
   A list appears.
2. From the **Main** menu, select **Transaction and Audit Event Management** and then click **Disaggregation Request**.
   The **Disaggregation Request** screen appears.
3. Click the **Add** button available in the upper right corner of the **Disaggregation Request** screen.

   The **Add Disaggregation Request** screen appears. It contains the following field:

Field Name	Field Description	Mandatory (Yes or No)
Disaggregation Request Type	Used to indicate the entity for which you want to create a disaggregation request. The valid values are: • **Account** - Used to create a disaggregation request for an account. **Note:** In this case, the system will disaggregate all billable charges of the account. • **Billable Charge** - Used to create a disaggregation request for an account for which a particular billable charge is created. **Note:** In this case, the system will disaggregate a specific billable charge of the account. • **Parent Accumulation Group** - Used to create reseeding requests for the accounts	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	using a parent accumulation group and by specifying the accumulation type (i.e. whether it is stop-loss or discount arrangement). **Note:** The **Parent Accumulation Group** option is used to create reseeding requests for accounts which belong to the healthcare domain. • **Person** - Used to create a disaggregation request for one or more accounts of a person and its child persons. **Note:** In this case, the system will disaggregate all billable charges of the account. • **Price Assignment** - Used to create a disaggregation request for an account with a particular price assignment. **Note:** In this case, the system will disaggregate only those billable charges of the account which are created using the respective price assignment. • **Price Item** - Used to create a disaggregation request for an account or for one or more accounts of a person and its child persons where a particular price item is assigned. **Note:** In this case, the system will disaggregate only those billable charges of the accounts which are created for the respective price item.	

4. Select the **Billable Charge** option from the **Disaggregation Request Type** list.
5. Click **OK**.

The **Add Disaggregation Request For Billable Charge** screen appears. It contains the following two sections:

- **Search Criteria** - Used to search for a billable charge of an account for which you want to create a disaggregation request. It contains the following fields:

Filed Name	Field Description	Mandatory (Yes or No)
Request Type	Indicates the entity for which you want to create the disaggregation request. The valid value is: • Billable Charge	Not applicable
Billable Charge ID	Used to search for a particular billable charge of an account.	Yes

- **Search Results** - On clicking the **Search** button, the search results appear based on the specified search criteria. The **Search Results** section contains the following columns:

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Column Name	Column Description
Account Identifier Type	Indicates the account identifier type using which the account is defined in the system. **Note:** The data appears in this column when the billable charge belongs to an account.
Account Identifier	Displays the value of the account identifier type. **Note:** The data appears in this column when the billable charge belongs to an account.
Division	Displays the division to which the account belongs.
Person Identifier Type	Indicates the person identifier type using which the person is defined in the system. **Note:** The data appears in this column when the billable charge belongs to an account of a person or child person.
Person Identifier	Displays the value of the person identifier type. **Note:** The data appears in this column when the billable charge belongs to an account of a person or child person.
Person Name	Displays the name of the person to whom the account belongs.
Assigned Price List	Displays the price list assigned to the account. **Note:** The data appears in this column when the price item pricing for which the billable charge is created is assigned through a price list.
Price List Assignment Start Date	Displays the date from when the price list is assigned to the account. **Note:** The data appears in this column when the price item pricing for which the billable charge is created is assigned through a price list.
Price List Assignment End Date	Displays the date till when the price list is assigned to the account. **Note:** The data appears in this column when the price item pricing for which the billable charge is created is assigned through a price list.
Account Information	Displays the concatenated string of information about the account separated by a comma (,).
Bill Cycle	Indicates the bill cycle defined for the account.

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> **Note:**
>
> Pagination is used to display limited number of records in the **Search Results** section. By default, 20 records are displayed in the **Search Results** section. You can change the number of records displayed per page from the **Page Limit** list, if required.
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> The**Page Limit** list includes only those values which are defined in the **PAGE_NUMBER** lookup field.
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> You can use the navigation buttons, such as **First** (<<), **Previous** (<), **Next** (>), and **Last** (>>) to navigate between pages. You can also select the page to which you want to navigate from the **Go To** list.
>
> ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.

6. Do either of the following:

If you want to...	Then...
Create disaggregation request for billable charge of one or more accounts	**a.** In the **Search Results** section, select the check box corresponding to the account for whose billable charge you want to create a disaggregation request. **b.** Click **Disaggregate**. A message appears confirming that the disaggregation request is created successfully. **c.** Click **OK**. The disaggregation request is created for the billable charge of the selected account.
Create disaggregation request for all billable charges that meet the search criteria	**a.** Click **Disaggregate All**. The **Disaggregate All Confirmation** window appears confirming whether you want to create disaggregation requests for all records. **b.** Click **OK**. The disaggregation request is created for all the billable charges of all accounts.

Related Topics

For more information on...	See...
Disaggregation Request screen	Disaggregation Request on page 1289
Search Disaggregation Request zone	Search Disaggregation Request on page 1289

Creating a Reseeding Request for a Parent Accumulation Group (Specific to Health Insurance Domain)

Procedure

To create a reseeding request for a parent accumulation group:

1. Click the **Menu** link in the **Application** toolbar.
   A list appears.

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2. From the **Main** menu, select **Transaction and Audit Event Management** and then click **Disaggregation Request**. The **Disaggregation Request** screen appears.
3. Click the **Add** button available in the upper right corner of the **Disaggregation Request** screen.

   The **Add Disaggregation Request** screen appears. It contains the following field:

Field Name	Field Description	Mandatory (Yes or No)
Disaggregation Request Type	Used to indicate the entity for which you want to create a disaggregation request. The valid values are: • **Account** - Used to create a disaggregation request for an account. **Note:** In this case, the system will disaggregate all billable charges of the account. • **Billable Charge** - Used to create a disaggregation request for an account for which a particular billable charge is created. **Note:** In this case, the system will disaggregate a specific billable charge of the account. • **Parent Accumulation Group** - Used to create reseeding requests for the accounts using a parent accumulation group and by specifying the accumulation type (i.e. whether it is stop-loss or discount arrangement). **Note:** The **Parent Accumulation Group** option is used to create reseeding requests for accounts which belong to the healthcare domain. • **Person** - Used to create a disaggregation request for one or more accounts of a person and its child persons. **Note:** In this case, the system will disaggregate all billable charges of the account. • **Price Assignment** - Used to create a disaggregation request for an account with a particular price assignment. **Note:** In this case, the system will disaggregate only those billable charges of the account which are created using the respective price assignment. • **Price Item** - Used to create a disaggregation request for an account or for one or more accounts of a person and its child persons where a particular price item is assigned.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	Note: In this case, the system will disaggregate only those billable charges of the accounts which are created for the respective price item.	

4. Select the **Parent Accumulation Group** option from the **Disaggregation Request Type** list.
5. Click **OK**.

   The **Add Disaggregation Request** screen appears. It contains the following field:

Field Name	Field Description	Mandatory (Yes or No)
Accumulation Type	Used to create reseeding request for a particular type of an accumulation group. The valid values are: • **Discount Arrangement** - Used to create reseeding request for accounts of all bill groups of a parent customer (for whom the parent accumulation group is created) where the claim settlement is based on a discount arrangement. • **Stop Loss** - Used to create reseeding request for accounts of all bill groups of a parent customer (for whom the parent accumulation group is created) where changes are made to the specific stop-loss (SSL), aggregate stop-loss (ASL), or level funded pricing rule.	Yes

6. Select the required option from the **Accumulation Type** field.

   The following fields appear in the **Add Disaggregation Request** screen:

Field Name	Field Description	Mandatory (Yes or No)
Parent Accumulation Group ID	Used to create reseeding request for accounts of all bill groups of a parent customer which belongs to a particular parent accumulation group. **Note:** The **Search** (🔍) icon appears corresponding to the **Parent Accumulation Group ID** field. On clicking the **Search** icon, the **Parent Accumulation Group ID Search** window appears where you can search for the respective parent accumulation group.	Yes
Disaggregate All Account	Used to indicate whether you want to create reseeding requests for accounts of all bill groups of a parent customer where the accumulation type is **Stop Loss**. If you do not select this option, the system creates reseeding requests for accounts of only those bill groups where the	No

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Field Name	Field Description	Mandatory (Yes or No)
	parent accumulation group is used for creating the specific stop-loss and aggregate stop-loss pricing rules. **Note:** This field appears only when you select the **Stop Loss** option from the **Accumulation Type** field.	

7. Enter the required details in the **Add Disaggregation Request** screen.
8. Click **Save**.
   The **Accumulation Based Disaggregation** screen appears with a list of accounts belonging to the parent accumulation group for which the reseeding request is created.

Related Topics

For more information on...	See...
Disaggregation Request screen	Disaggregation Request on page 1289
Search Disaggregation Request zone	Search Disaggregation Request on page 1289

Deleting a Disaggregation Request

Procedure

To delete a disaggregation request:

1. Search for the disaggregation request in the **Disaggregation Request** screen.
2. In the **Search Results** section, click the **Delete** (🗑) icon in the **Delete** column corresponding to the disaggregation request that you want to delete.
   A message appears confirming whether you want to delete the disaggregation request.
3. Click **OK**.
   The disaggregation request is deleted.

Note:

You can only delete a disaggregation request which is in the **Pending** status.

If the disaggregation process is already started for a disaggregation request, we recommend you not to delete the disaggregation request from the system. Otherwise, erroneous results might occur.

Related Topics

For more information on...	See...
How to search for a disaggregation request	Searching for a Disaggregation Request on page 1294
Search zone	Search Disaggregation Request on page 1289

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Chapter 17

Upload Validated Payment Data

Topics:

- Payment Upload Process
- Prerequisites
- CSV File Format
- Sample CSV
- Payment Data File Status Transition
- Payment Record Status Transition
- Error Messages
- Payment Upload

Oracle Revenue Management and Billing until now provided you with an ability to interface payments from an external source, such as remittance processor. The system supported two mechanisms to upload payment data - one using which you can populate payment upload staging records and another using which you can populate payment event upload staging records. The system now enables you to validate the payment records before you move them to the staging area. The system provides the pre-staging area where you can upload and validate the payment records. The system provides a user interface which helps you to upload a payment data file in the pre-staging area. It also helps you to perform various tasks, such as:

- Track the status of the payment records and the payment data file
- Move the payment records to the staging area
- Cancel a payment data file
- View the log of a payment data file
- Apply payments on the unpaid bills of an account or a statement

You can upload a payment data file in the CSV format. You need to ensure that the CSV file is in the required format; otherwise the file will not be uploaded in the system. For more information about the CSV file format, see CSV File Format on page 1325. At present, the system supports only the CSV file format. This is because the payment data mapping algorithm type shipped with the product is designed to support the CSV format. If you want to use any other file format, you need to define custom mapping algorithm type that supports the required file format.

The file type using which you upload a payment data file indicates the mapping and validation algorithms that you want to use for the payment data file. On uploading a payment data file, the mapping algorithm parses the CSV file and uploads the payments records in the pre-staging area. The validation process starts immediately after the file is uploaded in the system. During the validation process, the system and custom validations (if any) are executed. Once the validation process is complete, you can move the payment records from the pre-staging to staging area. Once the payment records are moved to the staging area, the system creates payment events, tenders, payments and payment segments through a batch process. For more information about the payment upload process, see Payment Upload Process on page 1322.

During the payment upload process, a payment data file and each record of the file goes through various statuses until the payment events and payments are created. For more information about the payment data file and payment record statuses, see Payment Data File Status Transition on page 1327 and Payment Record Status Transition on page 1328, respectively.

Payment Upload Process

The payment upload process includes the following sub-processes:

- Upload Payment Records in the Pre-Staging Area on page 1322
- Move Payment Records to the Staging Area on page 1323
- Create Payment Events and Payments on page 1323

Upload Payment Records in the Pre-Staging Area

Oracle Revenue Management and Billing allows you to validate the payment records before you move them to the staging area. You can upload and validate the payment records in the pre-staging area. You can upload a payment data file in the CSV format. You need to ensure that the CSV file is in the required format; otherwise the file will not be uploaded in the system. For more information about the CSV file format, see CSV File Format on page 1325.

While uploading a payment data file, you need to specify the file type using which you want to upload the payment data file. The file type indicates the mapping and validation algorithms that you want to use for the payment data file. Therefore, while defining a file type using which you want to upload a payment data file, you need to:

- Set the feed type to **Payment Upload Data**
- Attach mapping algorithm which is created using the **C1-CSVUPLPAY** algorithm type
- Attach validation algorithm which is created using the **C1-PUPLVALID** algorithm type

On uploading a payment data file, the mapping algorithm does the following:

1. Validates whether the file is in the CSV format
2. Validates whether at least one payment record is available in the CSV file
3. Parses the flat file in the CSV format and maps the columns in the CSV file to various tables in the database
4. Uploads the payments records in the pre-staging area

The validation process starts immediately after the payment data file is uploaded in the system. During the validation process, the system and custom validations (if any) are executed. The system checks whether:

- The data is available in the **Tender ID**, **Tender Amount**, **Payment Amount**, **Date Received**, **Bank Account**, and **Payment Type** columns in the CSV file.
- The data is available in the **Match Type** and **Match Value** columns in the CSV file.

  Note: This validation is done when the **Is Match Type Validation Required (Y/N)** parameter is set to **Y** in the validation algorithm.
- The payee and payor accounts specified in the payment record exists in the system.
- The payee account with the specified account identifier type and account identifier combination exists in the system.
- A valid currency code is specified in the payment record.

  Note: If the currency code is not specified, the currency is set to the payor account's invoice currency.
- The payment type (i.e. tender type) specified in the payment record exists in the system.
- The account identifier type specified in the payment record exists in the system.

  Note: This validation is done when the payee account ID is not specified in the payment record.
- The match type specified in the payment record exists in the system.

  Note: This validation is done when the **Is Match Type Validation Required (Y/N)** parameter is set to **Y** in the validation algorithm.
- The characteristic type specified in the payment record exists in the system.

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- The characteristic value matches any predefined value when the characteristic value type is set to **Predefined Value**.
- The characteristic value is specified in the payment record when the characteristic type is specified and vice-versa.

You can upload a file by clicking the **Upload** link in the **Payment Upload** screen. On uploading a payment data file, the payment records are copied to the pre-staging area and the status of the payment data file is set to **Pending**. The validation process starts immediately after the payment data file is uploaded in the system. If a payment record is successfully validated, the status of the payment record is set to **Valid**. If a payment record contains incorrect or missing data, the status of the payment record is set to either **Invalid** or **Error** depending on the scenario. For more information about the scenarios when a payment record is set to the **Invalid** or **Error** status, see Payment Record Status Transition on page 1328.

Once the validation process is completed, the status of the payment data file is changed to **Validated**. Once the payment records are uploaded and validated in the pre-staging area, you can do either of the following:

- Move the payment records to the staging area
- Cancel a payment data file
- Replace the existing payment data file

Note: If a payment data file contains an invalid record, you need to correct or add missing data in the CSV file and then upload the file once again. Unless, a payment data file has no invalid records, you cannot move any record of the payment data file to the staging area.

Move Payment Records to the Staging Area

Once the payment records are uploaded and validated in the pre-staging area, you can move the records to the staging area. The system allows you to move only valid and error records of a payment data file to the staging area. If a payment data file contains an invalid record, you cannot move any record of the payment data file to the staging area. In such scenario, you need to correct the invalid payment records and upload the same file once again in the system. In addition, if you have cancelled a payment data file, you cannot move any records (including valid and error records) of the payment data file to the staging area.

You can move the payment records to the staging area by clicking the **Move to Staging** (⎘) icon corresponding to the payment data file in the **Payment Upload** screen. The **Move to Staging** (⎘) icon appears when:

- The status of the payment data file is **Validated**.
- There are no invalid records in the payment data file.
- The **Disable Move to Staging** check box is not selected in the respective file type.

On clicking the **Move to Staging** (⎘) icon, the payment records are copied (and not moved) from the pre-staging to staging area and the status of the payment data file is changed to **In Staging**. In addition, the status of the payment records in the pre-staging area is changed to **In Staging** and the status of the deposit control, tender control, and payment tender staging records is set to **Pending**. Once you move the payment records to the staging area, you can edit the payment staging records, if required.

Create Payment Events and Payments

Once the payment records are moved to the staging area, the system creates payment events for the payment data file in the background when the **Payment Upload (PUPL)** batch is invoked. You can configure the **Payment Upload (PUPL)** batch such that it is executed at regular intervals. When the **Payment Upload (PUPL)** batch is invoked, the system checks whether there are any deposit control, tender control, payment tender, and payment staging records in the **Pending** status. If there are staging records in the **Pending** status, the system creates the following entities:

- Deposit Control
- Tender Control
- Payment Events

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- Payment Tenders
- Payments
- Payment Segments
- Financial Transactions (when the payments are frozen)

The status of the deposit control, tender control, payment tender, and payment staging records is changed to **Complete**. If any error occurs while creating payment event for a payment record, the status of the deposit control, tender control, payment tender, and payment staging records is changed to **Error**. In addition, the status of the payment record in the pre-staging area is changed to **Error in Staging**.

Traditionally, the **Payment Upload (PUPL)** batch considered staging records which are in the **Error** or **Pending** status. If a staging record is in the **Error** status, the system used to reset the status to **Pending** and then further processed the staging record. This system behavior still exists for staging records which are not uploaded through the **Payment Upload** process. If the staging records are uploaded through the **Payment Upload** process, you need to manually correct the staging records and change the status of deposit control, tender control, payment tender, and payment staging records to **Pending**. The corrected staging records will then be processed when the **Payment Upload (PUPL)** batch is invoked at subsequent interval.

Prerequisites

To setup the payment upload process, you need to do the following:

- Define the required match types with the appropriate payment distribution override and manual distribution algorithms.
- Define the required tender types in the system.
- Define the required currency codes in the system.
- Define the required tender sources in the system.
- Define the required characteristic types where the characteristic entity is set to **Payment**.
- Create a mapping algorithm using the **C1-CSVUPLPAY** algorithm type.
- Create a validation algorithm using the **C1-PUPLVALID** algorithm type.
- Define the required file types where the feed type is set to **Payment Upload Data**.
- Assign the **PUPL** To Do type to a To Do role whose users must receive the To Do generated while executing the **Payment Upload (PUPL)** batch.
- Set the batch control type of the **Payment Upload (PUPL)** batch to **Timed** and define the following attributes:
  - Time Interval
  - Timer Active
  - User ID
  - Batch Language
  - Email Address

Note: If you want to use the **Payment Upload** feature in an ORMB Cloud Service Premium Edition environment, you need to set the **Payment Upload Extendable Lookup and Bucket** option type of the **C1-CFS** feature configuration.

Related Topics

For more information on...	See...
How to set the **C1-CFS** feature configuration	Setting the C1-CFS Feature Configuration on page 4473

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CSV File Format

Before uploading a payment data file, you need to ensure that the CSV file contains the following columns:

Column Name	Column Description	Mandatory (Yes or No)
Account ID	Used to specify the payee account ID.	Yes
Match Type	Used to specify the match type using which you want to match the payment.	Yes (Conditional) **Note:** This data is required when the match value is specified.
Match Value	Used to specify the entity (such as bill, contract, and so on) against which you want to match the payment. **Note:** If you specify a match type where the entity type is set to **Account**, the match value should not be provided. The payee account ID is derived from the payment data record. If the payee account ID is not available in the payment data record, it is derived using the payee account identifier type and identifier value. The system then derives the unpaid bills of the payee account using the manual distribution algorithm attached to the respective match type. If you specify a match type where the entity type is set to **Statement**, the match value should not be provided. The statement ID is derived from the payment data record. The system then derives the unpaid bills of the statement using the manual distribution algorithm attached to the respective match type.	Yes (Conditional) **Note:** This data is required when the match type is specified.
Tender ID	Used to specify the payment tender ID. **Note:** If the tender ID is same for two or more payment records, the system will create multiple payments against one tender. In other words, there will be multiple payments which are created through the payment event.	Yes
Tender Amount	Used to specify the tender amount. **Note:** You must not specify the value less than or equal to 0. The precision specified for the tender amount must not exceed the decimal places defined for the currency in the system.	Yes
Payment Amount	Used to specify the amount paid through the tender.	Yes

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Column Name	Column Description	Mandatory (Yes or No)
	Note: You must not specify the value less than or equal to 0. The precision specified for the payment amount must not exceed the decimal places defined for the currency in the system.	
Date Received	Used to specify the date when the payment is made. **Note:** You must specify the date in the MM/DD/YYYY format.	Yes
Bank Account	Used to specify the external source ID which is associated with the tender source.	Yes
Payment Type	Used to specify the type of tender through which the payment is made.	Yes
Check Number	Used to specify the check number if the payment is made through check.	No
Currency	Used to specify the currency in which the payment is made. **Note:** If the currency is not specified, it is set to the payor account's invoice currency.	No
External Reference Id	Used to specify the external reference ID which is associated with the tender source.	No
Account ID Type	Used to specify the account identifier type.	Yes (Conditional) **Note:** This data is required when the account identifier is specified.
Account Identifier	Used to specify the account for which the payment is made.	Yes (Conditional) **Note:** This data is required when the account identifier type is specified.
Payment Char Type1, Payment Char Type2, ..., Payment Char Type5	Used to indicate the characteristic that must be defined for the payment.	Yes (Conditional) **Note:** This data is required when the characteristic value is specified.
Payment Char Value1, Payment Char Value2, ..., Payment Char Value5	Used to specify the value for the characteristic type.	Yes (Conditional) **Note:** This data is required when the characteristic type is specified.

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Column Name	Column Description	Mandatory (Yes or No)
MICR ID	Used to specify the MICR code.	No
Payor ID	Used to specify the payor account ID. **Note:** If the payor account ID is not specified, the payor account ID is set to the payee account ID assuming that the payor and payee are the same.	No
Statement ID	Used to specify the statement ID for applying payments at the statement level.	Yes (Conditional) **Note:** This data is required when the Statement ID is specified.

Note:

If a payment data file contains column names other than those mentioned in the above table, the system will not upload the payment data file.

The system considers the payment data file for upload only when the payment data file is parsed without any errors and contains less than 1000 payment records.

Sample CSV

```
1640731871,STMTPAY,344749531005,0100232,500.85,500.85,08/1/2022,TEST_EXT_SRC,
CASH,00100,USD,ABC8080808080,,,,,,,,,,,,,111,1640731871,041939614879
```

Payment Data File Status Transition

The following figure graphically indicates how a payment data file moves from one status to another during the payment upload process:

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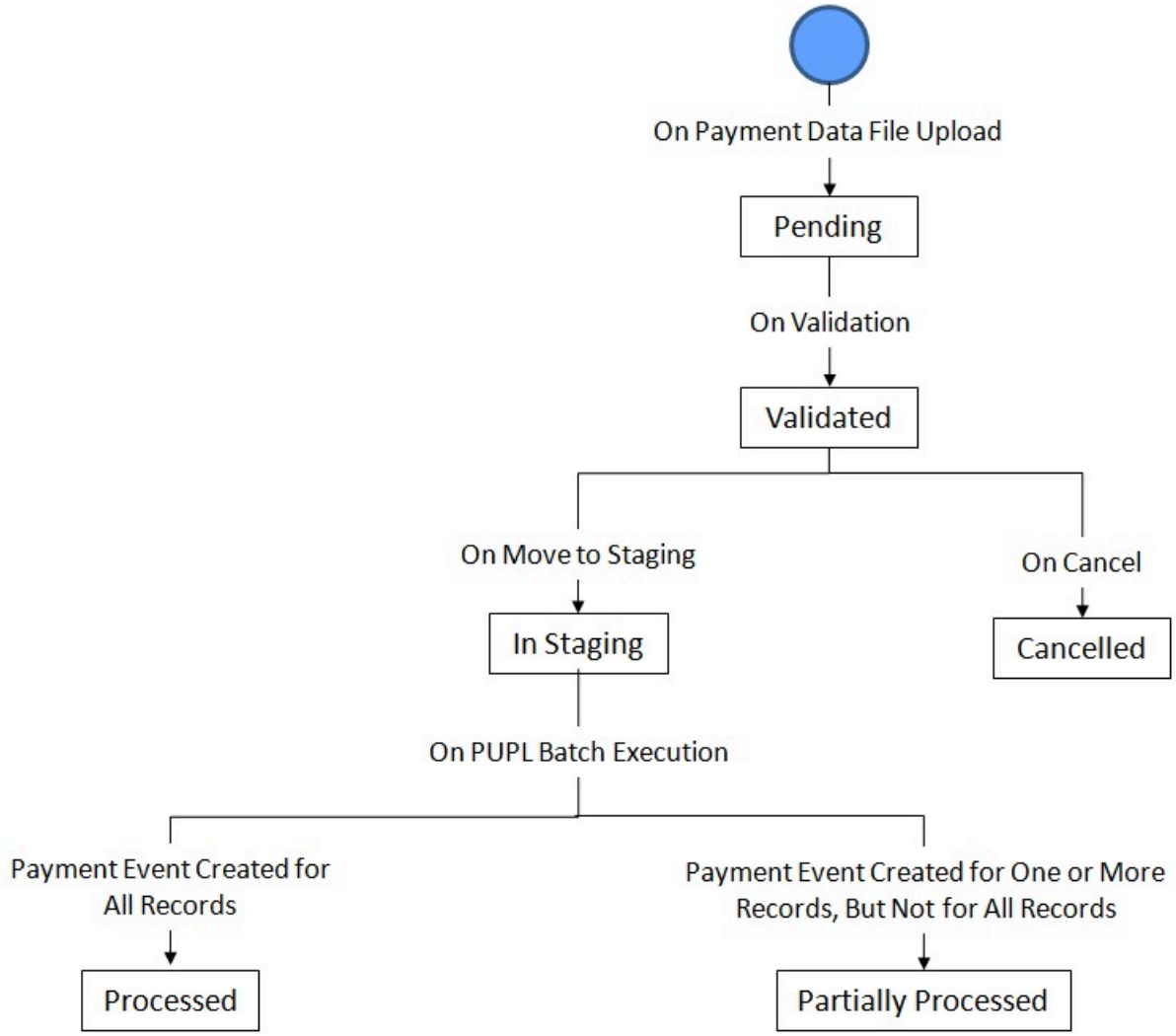

Payment Record Status Transition

The following figure graphically indicates how a payment record moves from one status to another during the payment upload process:

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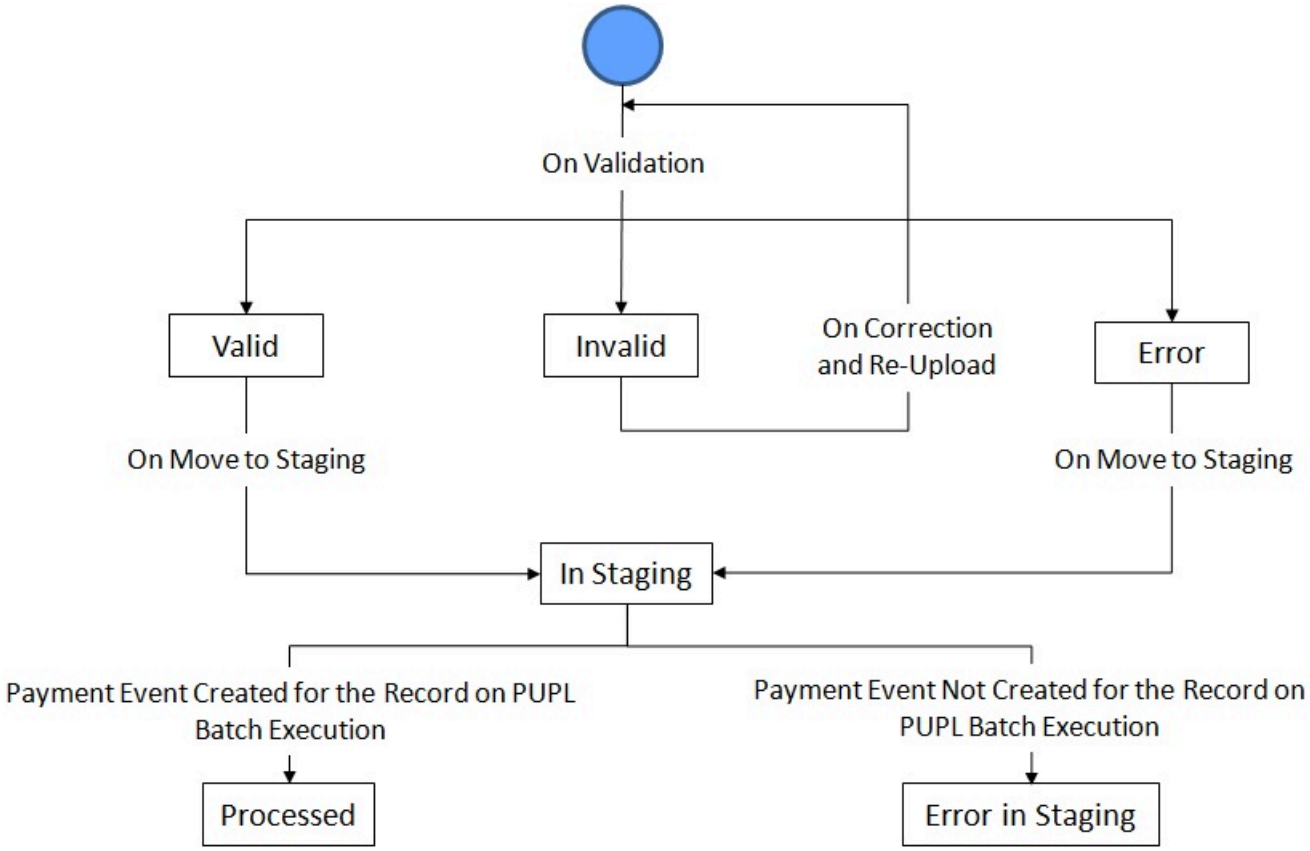

The following table lists the scenarios when a payment record is set to **Invalid** or **Error** status:

Scenario	**Payment Record Status**
The system could not find the payee account ID for a given account identifier type and account identifier combination when the payee account ID is not specified in the payment record.	Invalid
The payee account ID specified in the payment record does not exist in the system.	Invalid
The payee account ID, account identifier type, or account identifier are not specified in the payment record.	Invalid
The match type is not specified in the payment record.	Invalid
The match type specified in the payment record does not exist in the system.	Error
The match value is not specified in the payment record.	Invalid
The currency code does not exist in the system.	Invalid
The tender amount is either zero or not specified in the payment record.	Invalid
The payment amount is either zero or not specified in the payment record.	Invalid
The bank account is not specified in the payment record.	Invalid
The payment type (i.e. tender type) does not exist in the system.	Invalid
The payment type is not specified in the payment record.	Invalid

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Scenario	Payment Record Status
The tender ID is not specified in the payment record.	Invalid
The date received is not specified in the payment record.	Invalid
The payor account ID specified in the payment record does not exist in the system.	Invalid
The characteristic type specified in the payment record does not exist in the system.	Invalid
If a characteristic type is specified, but the characteristic value is not specified in the payment record.	Invalid
If a characteristic value is specified, but the characteristic type is not specified in the payment record.	Invalid
The characteristic value does not match any predefined value when the characteristic value type is set to **Predefined Value**.	Invalid

Note: The system does the match type and match value related validations when the **Is Match Type Validation Required (Y/N)** parameter is set to **Y** in the validation algorithm.

Error Messages

The following table lists the errors that may occur during the payment upload process. It also indicates how you can resolve these errors.

Message Number	Error Message	Message Category	Possible Issues
80110	File cannot be reuploaded as some records have already been processed.	11111	The possible issues could be: • You are trying to replace an existing file whose payment records are already moved to the staging area and/or for which payment events are already created.
1463	This file already exists in the system. Please check.	17000	The possible issues could be: • You are trying to upload a file which is already uploaded in the system without selecting the **Replace Existing File** check box.
1465	Please upload a file in the CSV format.	17000	The possible issues could be: • You are trying to upload a file which is not in the CSV format.
80113	Duplicate Header for column %1 in file.	11111	The possible issues could be: • The file has two or more columns with the same header.
80111	Length of value %1 too long for Field %2. Maximum length: %3 Found %4.	11111	The possible issues could be:

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<table>
<tr><th>Message Number</th><th>Error Message</th><th>Message Category</th><th>Possible Issues</th></tr>
<tr><td></td><td></td><td></td><td>
• The length of value specified in the column exceeds the maximum field length. The following table lists the maximum length of each field:
<table>
<tr><th>Column Name</th><th>Maximum Length</th></tr>
<tr><td>Account ID</td><td>10</td></tr>
<tr><td>Match Type</td><td>8</td></tr>
<tr><td>Match Value</td><td>30</td></tr>
<tr><td>Tender ID</td><td>12</td></tr>
<tr><td>Tender Amount</td><td>15</td></tr>
<tr><td>Payment Amount</td><td>15</td></tr>
<tr><td>Date Received</td><td>10</td></tr>
<tr><td>Bank Account</td><td>30</td></tr>
<tr><td>Payment Type</td><td>4</td></tr>
<tr><td>Check Number</td><td>10</td></tr>
<tr><td>Currency</td><td>3</td></tr>
<tr><td>Account ID Type</td><td>8</td></tr>
<tr><td>Account Identifier</td><td>30</td></tr>
<tr><td>Payment Char Type1, Payment Char Type2, ..., Payment Char Type5</td><td>8</td></tr>
<tr><td>Payment Char Value1, Payment Char Value2, ..., Payment Char Value5</td><td>254</td></tr>
<tr><td>MICR ID</td><td>30</td></tr>
<tr><td>Payor ID</td><td>10</td></tr>
</table>
</td></tr>
<tr><td>80085</td><td>Invalid value for column: %1.</td><td>11111</td><td>
The possible issues could be:
• The payee account ID specified in the payment record does not exist in the system.
• The match type specified in the payment record does not exist in the system.
• The currency code does not exist in the system.
• The account identifier type specified in the payment record does not exist in the system.
• The tender amount is either zero or not specified in the payment record.
• The payment amount is either zero or not specified in the payment record.
</td></tr>
</table>

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Message Number	Error Message	Message Category	Possible Issues
			• The bank account is not specified in the payment record. • The payment type (i.e. tender type) does not exist in the system. • The tender ID is not specified in the payment record. • The date received is not specified in the payment record. • The characteristic type specified in the payment record does not exist in the system. • The payor account ID specified in the payment record does not exist in the system.
80100	Invalid Account Identifier and Account Identifier Type code combination.	11111	The possible issues could be: • The system could not find the payee account ID for a given account identifier type and account identifier combination when the payee account ID is not specified in the payment record.
80086	%1 has more decimal positions than currency code %2 supports (%3).	11111	The possible issues could be: • The precision specified for the tender amount exceeds the decimal places defined for the currency in the system. • The precision specified for the payment amount exceeds the decimal places defined for the currency in the system.
13601	Tender Source does not exist for External Source ID (%1)	11	The possible issues could be: • The tender source does not exist for the external source ID in the system.
13603	Deposit control (%1/%2) Deposit Amount is not equal to sum of Tender Amounts	11	The possible issues could be: • The sum of tender control staging amount does not match the deposit control staging amount.
13604	Deposit Control (%1/%2) Tender count does not equal the number of Tender controls	11	The possible issues could be: • The number of tender control staging records does not match the total tender controls specified in the deposit control staging record.
13605	Tender control (%1/%2/%3) Total Tender Amount not equal to sum of Tender Amounts	11	The possible issues could be: • The sum of payment tender staging amount does not match the total tender amount specified in tender control staging record.
13606	Tender control (%1/%2/%3) tender count does not equal the number of Tenders	11	The possible issues could be:

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Message Number	Error Message	Message Category	Possible Issues
			• The number of payment tender staging records does not match the total number of tenders specified in the tender control staging record.
13607	Suspense Contract does not exist for External Source ID (%1)	11	The possible issues could be: • The suspense contract is not defined for the tender source.
13608	Many Tender Sources found for External Source ID (%1)	11	The possible issues could be: • There are multiple tender sources in the system with the same external source ID.
13701	Pay Tender (%1/%2/%3/%4) Amount not equal to sum of Pay Amounts	11	The possible issues could be: • The sum of payment staging amount does not match the total amount specified in payment tender staging record.
13705	Payment (%1/%2/%3/%4) Person ID (%5) exists on multiple accounts.	11	The possible issues could be: • There are multiple payment records having contracts with the same old account ID but their payee account ID is different.
80194	File has no records to upload	11111	The possible issues could be: • You are trying to upload a file without any payment records.
80195	Incorrect header: %1	11111	The possible issues could be: • One or more column names in the payment data file are incorrect.
80196	Maximum file name size allowed is 60 characters	11111	The possible issues could be: • The file name contains more than 60 characters.
80199	Missing value for column %1	11111	The possible issues could be: • The match type is not specified in the payment record. • The match value is not specified in the payment record. • The payment type is not specified in the payment record.

Payment Upload

The **Payment Upload** screen allows you to search for a payment data file using various search criteria. Through this screen, you can:

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- Upload a payment data file
- Cancel a payment data file
- View the records uploaded through a payment data file
- View the staging records of a payment data record
- View the log of a payment data file
- Move the payment records to the staging area
- Edit a payment staging record
- Replace an existing payment data file
- View the reasons why the payment record is in the **Error** or **Invalid** status

This screen consists of the following zones:

- Search Payment Data File on page 1334
- Payment Data Records on page 1336
- Payment Staging Records on page 1338
- Payment Data File Log on page 1338

Search Payment Data File

The **Search Payment Data File** zone allows you to search for a payment data file which is uploaded and/or processed in the system. This zone contains the following two sections:

- **Search Criteria** - The **Search Criteria** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
File Name	Used to search a particular payment data file.	No
User ID	Used to search payment data files which are uploaded by a particular user.	No
File Type	Used to search payment data files which are uploaded using a particular file type.	No
Upload From Date	Used to search payment data files which are uploaded from a particular date onwards. **Note:** By default, the date is set to the current date minus 7 days. You can change the date, if required.	No
File Status	Used to search payment data files with a particular status. The valid values are: • Cancelled • In Staging • Partially Processed • Pending • Processed • Validated	No
Upload To Date	Used to search payment data files which are uploaded till a particular date. **Note:** By default, the date is set to the current date. You can change the date, if required.	No

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Note: You must specify at least one search criterion while searching for a payment data file.

- **Search Results** - On clicking the **Search** button, the search results appear based on the specified search criteria. The **Search Results** section contains the following columns:

Column Name	Column Description
File Name	Displays the name of the payment data file.
File Type	Indicates the type of the payment data file.
Upload Date	Displays the date and time when the payment data file was uploaded in the system.
Status	Indicates the status of the payment data file. The valid values are: • Cancelled • In Staging • Partially Processed • Pending • Processed • Validated
Total	Displays the total number of records that are uploaded through the payment data file.
Valid	Displays the number of records which are successfully validated in the system.
Invalid	Displays the number of records which could not pass through the validation process in the system.
Error	Displays the number of records where the data is incorrect.
In Staging	Displays the number of records which are copied from the pre-staging to staging area.
Processed	Displays the number of records for which payment events are created.
Staging Error	Displays the number of records for which payment events could not be created.
Cancel	On clicking the **Cancel** (⊘) icon, you can cancel the payment data file. **Note:** The **Cancel** icon appears when the status of the payment data file is **Validated**. In other words, you cannot cancel a payment data file when its records are moved to the staging area or when the payment events are created for the payment data file.
Move to Staging	On clicking the **Move to Staging** (⧉) icon, you can move the valid and error records of the payment data file to the staging area. **Note:** The **Move to Staging** icon appears when: • The status of the payment data file is **Validated**. • There are no invalid records in the payment data file. • The **Disable Move to Staging** check box is not selected in the respective file type.

Note:

Pagination is used to display limited number of records in the **Search Results** section. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

You can view the **Filter** area by clicking the **Filters** (▽) icon in the upper right corner of this zone.

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You can upload a payment data file by clicking the **Upload** button in the **Page Title** area of the **Payment Upload** screen. On clicking the **Broadcast** (((•))) icon corresponding to the payment data file, the **Payment Data Records** and **Payment Data File Log** zones appear.

Related Topics

For more information on...	See...
Payment Upload screen	Payment Upload on page 1333
How to upload a payment data file	Uploading a Payment Data File on page 1339
How to search for a payment data file	Searching for a Payment Data File on page 1339
How to cancel a payment data file	Cancelling a Payment Data File on page 1342
How to replace an existing payment data file	Replacing an Existing File on page 1341
How to move the payment records to the staging area	Moving the Payment Records to the Staging Area on page 1343
How to edit a payment staging record	Editing a Payment Staging Record on page 1343
How to view the records of a payment data file	Viewing the Records of a Payment Data File on page 1344
How to view the log of a payment data file	Viewing the Log of a Payment Data File on page 1345

Payment Data Records

The **Payment Data Records** zone lists the records of the payment data file. This zone contains the following columns:

Column Name	Column Description
Payor Account ID	Indicates the account through which the payment is made.
Payee Account ID	Indicates the account for which the payment is made.
Statement ID	Indicates the statement for which the payment is made.
Match Type	Indicates the match type using which the payment must be matched.
Match Value	Indicates the entity (such as bill, contract, and so on) against which the payment must be matched.
Entity Type	Indicates the entity type.
Pay Tender ID	Displays the payment tender ID.
Tender Amount	Displays the tender amount.
Payment Amount	Displays the amount paid through the tender.
Currency	Indicates the currency in which the payment is made.
Date Received	Displays the date when the payment is made.

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Column Name	Column Description
Bank Account	Displays the bank account from which the payment is made.
Tender Type	Indicates the type of tender through which the payment is made.
Check Number	Displays the check number if the payment is made through check.
MICR ID	Displays the MICR code.
Status	Indicates the status of the payment record. The valid values are: • Valid • Invalid • Error • In Staging • Processed • Error in Staging
Payment Event Information	Displays information about the payment event which is created for the payment record. **Note:** It has a link. On clicking the link, the **Payment Event** screen appears with the details of the respective payment event. The data appears in this column when the status of the payment record is **Processed**.
Messages	On clicking the **View** (🔗) icon, the **Error Messages** window appears where you can view the reasons why the status of the payment record is **Invalid** or **Error**. **Note:** The **View** icon appears when the payment data record is in the **Error** or **Invalid** status.

Note:

Pagination is used to display limited number of records in the **Payment Data Records** zone. By default, 20 records are displayed in this zone. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

You can filter the list using various search criteria (such as, **Status** and **Check Number**) available in the **Filter** area. By default, the **Filter** area is hidden. You can view the **Filter** area by clicking the **Filters** (▽) icon in the upper right corner of this zone.

By default, the **Payment Data Records** zone does not appear in the **Payment Upload** screen. It appears when you click the **Broadcast** (📡) icon corresponding to the payment data file in the **Search Payment Data File** zone.

Related Topics

For more information on...	See...
How to view the records of a payment data file	Viewing the Records of a Payment Data File on page 1344
How to viewing the staging records of a payment data record	Viewing the Staging Records of a Payment Data Record on page 1344
How to view the error messages of a payment data file	Viewing the Errors of a Payment Data Record on page 1345

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Payment Staging Records

The **Payment Staging Records** zone lists the staging records of the payment data file. This zone contains the following columns:

Column Name	Column Description
View	On clicking the **View** (🔗) icon, you can view the payment upload staging details.
External Source ID	Displays the external source ID which is associated with the tender source.
External Reference ID	Displays the external reference ID which is associated with the tender source.
External Transmission ID	Displays the external transmission ID which is associated with the tender source.
External Batch ID	Displays the batch of payments in a transmission.
Payee Account ID	Indicates the account for which the payment is made.
Match Type	Indicates the match type using which the payment is matched.
Match Value	Indicates the entity (such as bill, contract, and so on) against which the payment is matched.
Payment Amount	Displays the amount paid through the tender source.

By default, the **Payment Staging Records** zone does not appear in the **Payment Upload** screen. It appears when you click the **Broadcast** (📡) icon corresponding to the payment data record in the **Payment Data Records** zone.

Related Topics

For more information on...	See...
How to view the staging records of a payment data record	Viewing the Staging Records of a Payment Data Record on page 1344

Payment Data File Log

The **Payment Data File Log** zone lists the complete trail of actions performed on the payment data file. This zone contains the following columns:

Column Name	Column Description
Creation Date Time	Displays the date and time when the action is performed on the payment data file.
Log Details	Displays the details of the action performed on the payment data file.
User	Indicates the user who performed the action on the payment data file.

By default, the **Payment Data File Log** zone does not appear in the **Payment Upload** screen. It appears when you click the **Broadcast** (📡) icon corresponding to the payment data file in the **Search Payment Data File** zone.

Related Topics

For more information on...	See...
How to view the log of a payment data file	Viewing the Log of a Payment Data File on page 1345

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Searching for a Payment Data File

Prerequisites

To search for a payment data file, you should have:

- File types defined in the application (where the feed type is set to Payment Upload Data)

Procedure

To search for a payment data file:

1. Click the **Menu** link in the **Application** toolbar.
   A list appears.
2. From the **Main** menu, select **Payments** and then click **Payment Upload**.
   The **Payment Upload** screen appears.
3. Enter the search criteria in the **Search Payment Data File** zone.

   Note: ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.
4. Click **Search**.
   A list of payment data files that meet the search criteria appears in the **Search Results** section.

Related Topics

For more information on...	See...
Payment Upload screen	Payment Upload on page 1333
Search Payment Data File zone	Search Payment Data File on page 1334

Uploading a Payment Data File

Prerequisites

To upload a payment data file, you should have:

- File types defined in the application (where the feed type is set to **Payment Upload Data**)
- Payment data in the required CSV file format

Procedure

To upload a payment data file:

1. Click the **Menu** link in the **Application** toolbar.
   A list appears.
2. From the **Main** menu, select **Payments** and then click **Payment Upload**.
   The **Payment Upload** screen appears.
3. Click the **Upload** button in the **Page Title** area of the **Payment Upload** screen.

   The **Upload Payment Data File** screen appears. It contains the following fields:

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Field Name	Field Description	Mandatory (Yes or No)
File Type	Used to indicate the type of payment data file. **Note:** The list includes only those file types where the feed type is set to **Payment Upload Data**.	Yes
File Name	Used to specify the name and path of the payment data file that you want to upload. **Note:** You can also click the **Browse** button corresponding to this field to browse to the location where the payment data file is available in the system.	Yes
Replace Existing File	Used to indicate whether you want to replace any existing file in the system. You must select this check box when you want to upload the same file once again.	No

4. Select the type of payment data file from the **File Type** list.
5. Click the **Browse** button corresponding to the **File Name** field.

   The **Choose File to Upload** dialog box appears.
6. Browse to the location where the payment data file that you want to upload is available.
7. Click **Open**.

   The payment data file name and path appears in the **File Name** field.
8. Click **Upload**.

   A message appears indicating that the payment data file is uploaded successfully. If an error occurs while parsing, the payment data file is not uploaded in the system.

Note: The system considers the payment data file for upload only when the payment data file is parsed without any errors and contains less than 1000 payment records.

9. Click **OK**.

   Once the payment data file is successfully uploaded, the status of the payment data file is changed to **Pending**. The system changes the status of the payment data file based on the following conditions:

   - If a payment record is successfully validated, the status of the payment record is changed to **Valid**.
   - If a payment record is incorrect or contains missing information, the status of the payment record is either changed to **Invalid** or **Error**. For more information on various payment record statuses, see the Payment Record Status Transition on page 1328.

   Once the validation process is completed, the payment records are copied to the pre-staging area and the status of the payment data file is changed to **Validated**. If a payment data file contains an invalid record, you need to correct or add missing information in the CSV file and then re-upload the file once again. Unless and until, a payment data file has no invalid records, you cannot move any record to the staging area. You can view the details of the payment data file in the **Payment Upload** screen.

Related Topics

For more information on...	See...
Payment Upload screen	Payment Upload on page 1333
Search Payment Data File zone	Search Payment Data File on page 1334

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Replacing an Existing File

Prerequisites

To replace an existing payment data file, you should have:

- File types defined in the application (where the feed type is set to **Payment Upload Data**)
- Payment data in the required CSV file format

Procedure

To replace an existing payment data file:

1. Click the **Menu** link in the **Application** toolbar.
   A list appears.
2. From the **Main** menu, select **Payments** and then click **Payment Upload**.
   The **Payment Upload** screen appears.
3. Click the **Upload** button in the **Page Title** area of the **Payment Upload** screen.

   The **Upload Payment Data File** screen appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
File Type	Used to indicate the file type for uploading the payment data file. **Note:** The list includes only those file types where the feed type is set to **Payment Upload Data**.	Yes
File Name	Used to indicate the name and path of the payment data file that you want to upload. **Note:** You can also click the **Browse** button corresponding to this field to browse the location of the payment data file available in the system.	Yes
Replace Existing File	Used to indicate whether you want to replace any existing file in the system. **Note:** You must select this check box only when you want to upload the same file once again. You can replace an existing file when the payment data file is in the **Validated** status. In other words, you cannot replace a file whose payment records are already moved to the staging area and/or for which payment events are already created.	No

4. Select the type of payment data file from the **File Type** list.
5. Click the **Browse** button corresponding to the **File Name** field.

   The **Choose File to Upload** dialog box appears.
6. Browse to the location where the payment data file that you want to replace is available.
7. Click **Open**.

   The payment data file name and path appears in the **File Name** field.

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8. Click **Upload**.

   A message appears indicating that the payment data file is uploaded successfully.

   Note: The system considers the payment data file for upload only when the payment data file is parsed without any errors and contains less than 1000 payment records.

9. Click **OK**

   Once the payment data file is successfully uploaded, the status of the payment data file is changed to **Pending**. The system changes the status of the payment data file based on the following conditions:

   - If a payment record is successfully validated, the status of the payment record is changed to **Valid**.
   - If a payment record is incorrect or contains missing information, the status of the payment record is either changed to **Invalid** or **Error**. For more information on various payment record statuses, see the Payment Record Status Transition on page 1328.

   Once the validation process is completed, the payment records are copied to the pre-staging area and the status of the payment data file is changed to **Validated**. If a payment data file contains an invalid record, you need to correct or add missing information in the CSV file and then re-upload the file once again. Unless and until, a payment data file has no invalid records, you cannot move any record to the staging area. You can view the details of the payment data file in the **Payment Upload** screen.

Related Topics

For more information on...	See...
Payment Upload screen	Payment Upload on page 1333
Search Payment Data File zone	Search Payment Data File on page 1334

Cancelling a Payment Data File

There might be situations when incorrect payment data file is uploaded in the system. In such case, the system provides you with an ability to cancel the file. However, note that you can cancel a payment data file when it is in the **Validated** status. In other words, you cannot cancel a payment data file when its records are moved to the staging area or when the payment events are created for the payment data file.

Procedure

To cancel a payment data file:

1. Search for the payment data file in the **Payment Upload** screen.
2. In the **Search Results** section, click the **Cancel** (⊘) icon in the **Cancel** column corresponding to the payment *d*ata file that you want to cancel.
   A message appears confirming whether you want to cancel the payment data file.

   Note: The **Cancel** icon appears when the status of the payment data file is **Validated**.

3. Click **OK**.
   The status of the payment data file is changed to **Cancelled**.

Related Topics

For more information on...	See...
How to search for a payment data file	Searching for a Payment Data File on page 1339

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Moving the Payment Records to the Staging Area

Procedure

To move the payment records to the staging area:

1. Search for the payment data file in the **Payment Upload** screen.
2. In the **Search Results** section, click the **Move to Staging** (⧉) icon in the **Move to Staging** column *c*orresponding to the payment data file whose records you want to move to the staging area.

   A message appears confirming whether you want to move all payment records to the payment upload staging area.

   Note:

   The **Move to Staging** icon appears when:

   - The status of the payment data file is **Validated**.
   - There are no invalid records in the payment data file.
   - The **Disable Move to Staging** check box is not selected in the respective file type.

   The system allows you to move only valid and error records of a payment data file to the staging area. If a payment data file contains an invalid record, you cannot move any record of the payment data file to the staging area.
3. Click **OK** in the message box.
   A message appears indicating that the payment records are successfully copied from the pre-staging to staging area.
4. Click **OK** in the message box.
   The status of the payment data file is changed to **In Staging**. In addition, the status of the payment records in the pre-staging area is changed to **In Staging** and the status of the deposit control, tender control, and payment tender staging records is set to **Pending**.

Related Topics

For more information on...	See...
How to search for a payment data file	Searching for a Payment Data File on page 1339

Editing a Payment Staging Record

You can edit a payment record when it is moved from the pre-staging to staging area. On editing a payment record in the staging area, the system does not reflect the changes in the pre-staging area. It only reflects the changes in the staging area.

Procedure

To edit a payment staging record:

1. Search for the payment data file in the **Payment Upload** screen.
2. In the **Search Results** section, click the **Broadcast** (📡) icon corresponding to the payment data file whose *s*taging records you want to edit.
   The **Payment Data Records** and **Payment Data File Log** zones appear.
3. In the **Payment Data Records** section, click the **Broadcast** (📡) icon corresponding to the payment data file *w*hose staging records you want to edit.
   The **Payment Staging Records** zone appear.
4. In the **Payment Staging Records** zone, click the **View** (🔗) icon in the **Payment Staging Record** column *c*orresponding to the payment staging record whose details you want to edit.
   The **Payment Upload Staging** screen appears. It contains the following tabs:

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- **Tender Details** - Enables you to view and edit the tender control staging details.
- **Payment Advice** - Enables you to view and edit the payment staging details.
- **Payment Characteristics** - Enables you to view and edit the payment characteristic staging details.

5. Edit or remove the tender details, if required.
6. Edit or remove the payment advice details, if required.
7. Edit or remove the payment characteristics, if required.
8. Click the **Save** button in the **Page Title** area of the **Payment Upload Staging** screen.
   The changes made to the payment staging record are saved.

Related Topics

For more information on...	See...
How to search for a payment data file	Searching for a Payment Data File on page 1339
Payment Data Records zone	Payment Data Records on page 1336
Payment Staging Records zone	Payment Staging Records on page 1338
Payment Data File Log zone	Payment Data File Log on page 1338

Viewing the Records of a Payment Data File

Procedure

To view the records of a payment data file:

1. Search for the payment data file in the **Payment Upload** screen.
2. In the **Search Results** section, click the **Broadcast** (ᯤ) icon corresponding to the payment data file whose *r*ecords you want to view.
   The **Payment Data Records** and **Payment Data File Log** zones appear.
3. View the details of the payment records uploaded through the payment data file in the **Payment Data Records** zone.

Related Topics

For more information on...	See...
How to search for a payment data file	Searching for a Payment Data File on page 1339
Payment Data Records zone	Payment Data Records on page 1336

Viewing the Staging Records of a Payment Data Record

Procedure

To view the staging records of a payment data record:

1. Search for the payment data file in the **Payment Upload** screen.
2. In the **Search Results** section, click the **Broadcast** (ᯤ) icon corresponding to the payment data file whose *r*ecords you want to view.
   The **Payment Data Records** and **Payment Data File Log** zones appear.
3. In the **Payment Data Records** zone, click the **Broadcast** (ᯤ) icon corresponding to the payment data file *w*hose staging records you want to view.
4. View the details of the staging records in the **Payment Staging Records** zone.

Related Topics

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For more information on...	See...
How to search for a payment data file	Searching for a Payment Data File on page 1339
Payment Data Records zone	Payment Data Records on page 1336
Payment Staging Records zone	Payment Staging Records on page 1338
Payment Data File Log zone	Payment Data File Log on page 1338

Viewing the Log of a Payment Data File

Procedure

To view the log of a payment data file:

1. Search for the payment data file in the **Payment Upload** screen.
2. In the **Search Results** section, click the **Broadcast** (📡) icon corresponding to the payment data file whose *l*og you want to view.
   The **Payment Data Records** and **Payment Data File Log** zones appear.
3. View the actions performed on the payment data file in the **Payment Data File Log** zone.

Related Topics

For more information on...	See...
How to search for a payment data file	Searching for a Payment Data File on page 1339
Payment Data File Log zone	Payment Data File Log on page 1338

Viewing the Errors of a Payment Data Record

The system allows you to view the reasons why the payment record in a payment data file is in the **Error** or **Invalid** status.

Procedure

To view the errors of a payment data record:

1. Search for the payment data file in the **Payment Upload** screen.
2. In the **Search Results** section, click the **Broadcast** (📡) icon corresponding to the payment data file whose *p*ayment records are in the **Error** or **Invalid** status.
   The **Payment Data Records** and **Payment Data File Log** zones appear.
3. In the **Payment Data Records** zone, click the **View** (🔗) icon in the **Message** column corresponding *t*o the payment record which is in the **Error** or **Invalid** status.
   The **Error Messages** window appears.
4. View the error messages of the payment data record in the **Error Messages** window.

> **Note:**
>
> The error messages window lists the reasons why the payment data record is in the **Error** or **Invalid** status. If the payment record is in the **Invalid** status, you need to correct or add the missing information in the CSV file and then re-upload the CSV file once again. Unless, a payment data file has no invalid records, you cannot move any record of the payment data file to staging area.
>
> The **View** icon appears when the payment data record is in the **Error** or **Invalid** status.

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5. Click **OK**.

Related Topics

For more information on...	See...
How to search for a payment data file	Searching for a Payment Data File on page 1339
Payment Data Records zone	Payment Data Records on page 1336

Chapter 18

Freeze Payments on Notification

Topics:

- Freeze Payments on Notification Process
- Prerequisites
- Automatic Payment or Refund Clearing Staging Record Status Transition
- EDI 824 File Format
- Sample EDI 824 File Format
- Automatic Payment and Refund Upload Reason
- Automatic Payment and Refund Clearing Staging

Oracle Revenue Management and Billing facilitates you to create automatic payments and refunds when the automatic payment option is enabled for an account. A clearing record is created for each automatic payment and refund in the system. You can then send the automatic payment and refund clearing records to the auto clearing house for verification. The system provides the mechanism to extract the automatic payment clearing records in a flat file. You can then send the flat file to the auto clearing house for verification. However, the implementation team will have to write the custom logic to extract the automatic refund clearing records in a file which you can then send to the auto clearing house for verification.

Once the auto clearing house reviews the automatic payment clearing records, the system allows you to upload review comments received in the EDI 824 file format. On uploading an EDI 824 file, an automatic payment clearing staging record is created for each valid automatic payment clearing ID. The data received from the auto clearing house is stored in the following staging tables:

- CI_APAY_STAGE_UP
- CI_APAY_STAGE_UP_REM
- CI_APAY_STGUP_CHAR

The implementation team will have to write the custom logic to upload review comments for automatic refund clearing records in the above mentioned staging tables. The review comments for automatic payment clearing records can be received in the form of reason (i.e. upload reason) and error codes (i.e. payment cancelation reason or NOC reason) which will help you to determine whether the automatic payment must be frozen or cancelled in the system. Similarly, the review comments for automatic refund clearing records can be received in the form of reason (i.e. upload reason) and error codes (i.e. void status reason) which will help you to determine whether the refund request must be voided and refund adjustments must be cancelled in the system.

Once the review comments are received from the auto clearing house, you can do the following:

- Freeze or cancel the automatic payments
- Void the refund requests and cancel the refund adjustments

For more detailed information about the freeze payments on notification process, see Freeze Payments on Notification Process on page 1349.

The system allows you to define upload reasons, payment cancelation reasons, NOC reasons, and void status reasons. The system also allows you to edit and delete the automatic payment and refund clearing staging records through the user interface. However, you can edit an automatic payment or refund clearing staging record when it is in the **Pending** or **Error** status, and you can delete an automatic payment or refund clearing staging record when it is in the **Pending** status. During the freeze payments on notification process,

the automatic payment and refund clearing staging records go through various statuses in its lifecycle. For more information about the statuses, see Automatic Payment or Refund Clearing Staging Record Status Transition on page 1354.

For more information on how to setup the freeze payments on notification process, see Prerequisites on page 1352.

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Freeze Payments on Notification Process

The Freeze Payments on Notification process includes the following sub-processes:

1. Creating Automatic Payments and Refunds on page 1349
2. Generating a Flat File on page 1349
3. Uploading Response from Auto Clearing House (ACH) on page 1350
4. Retry Automatic Payment on page 1350
5. Freezing or Canceling Automatic Payments on page 1351
6. Voiding Refund Requests and Canceling Refund Adjustments on page 1351
7. Generating To Do Entries on page 1352
8. Creating Tender Controls on page 1352

Note that during the freeze payments on notification process, you need to execute the following batches in the specified order:

1. Create Automatic Payments and Refunds (APAYCRET)
2. Activate Automatic Payments (ACTVTAPY)
3. Extract Automatic Payments (APAYACH)
4. Maintain Additional Information for Staging Record (C1-APRCH)
5. Upload Response from Auto Clearing House (C1-APACK)
6. Freeze or Cancel Automatic Payments (APAYRA)
7. Cancel Automatic Refunds (AREFRA)
8. To Do Creation for Automatic Payment Exception Records (APAYUPTD)
9. Create Tender Controls for Automatic Payments (BALAPY)

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

Creating Automatic Payments and Refunds

If you have configured the automatic payment option for an account, the system calculates the automatic payment amount and extract date during the bill completion and stamps these details against the bill in the **CI_BILL_ACH** table. The **Create Automatic Payments and Refunds (APAYCRET)** batch allows you to create automatic payment and refund request depending on whether the automatic payment amount is in debit or credit. It also creates a clearing record for each automatic payment and refund in the **CI_APAY_CLR_STG** and **CI_ADJ_CLR_STG** tables, respectively. For more information about the batch, see *Oracle Revenue Management and Billing Batch Guide*.

Generating a Flat File

Unless you activate a clearing record, you cannot extract the clearing record in a flat file. The **Activate Automatic Payments (ACTVTAPY)** batch allows you to activate a clearing record. It stamps the **APAYACH** batch control and incremental batch run number on the clearing record.

Once the clearing records are activated, you can extract the clearing records in a flat file. The **Extract Automatic Payments (APAYACH)** batch allows you to extract the clearing records with the latest batch run number in a flat file. The flat file is then sent to the auto clearing house for review. For more information about these batches, see *Oracle Revenue Management and Billing Batch Guide*.

Note: At present, you cannot activate and extract the automatic refund clearing records using the **Activate Automatic Payments (ACTVTAPY)** and **Extract Automatic Payments (APAYACH)** batches, respectively. The implementation team will have to write the custom logic to activate and extract automatic refund clearing records in a flat file.

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Uploading Response from Auto Clearing House (ACH)

Once the auto clearing house reviews the automatic payment clearing records, the review comments can be shared in the EDI 824 file format. An EDI 824 file may contain the review comments for one or more automatic payment clearing records. You can upload these EDI 824 files and store the review comments in the staging area using the **Upload Response from Auto Clearing House (C1-APACK)** batch.

On uploading an EDI 824 file, the system checks whether the automatic payment clearing ID specified in each record exists in the system. If so, it creates an automatic payment clearing staging record for the automatic payment clearing ID in the **CI_APAY_STAGE_UP** table. If the acknowledgement code in the record is set to **TE** or **TR**, the system considers that the auto clearing house has rejected the automatic payment clearing record. The reason code (i.e. upload reason) specified in the **Reject Upload Reason** parameter of the **C1-APAY** algorithm is stored corresponding to the automatic payment clearing staging record in the **CI_APAY_STAGE_UP_REM** table. In addition, the error code (i.e. payment cancelation reason) is stored corresponding to the automatic payment clearing staging record in the **CI_APAY_STAGE_UP_REM** table.

However, if the acknowledgement code is blank or if the acknowledgement code is set to a value other than **TE** or **TR**, the system considers that the auto clearing house has accepted the automatic payment clearing record. The reason code (i.e. upload reason) specified in the **Success Upload Reason** parameter of the **C1-APAY** algorithm is stored corresponding to the automatic payment clearing staging record in the **CI_APAY_STAGE_UP_REM** table. In addition, the error code (i.e. NOC reason) is stored corresponding to the automatic payment clearing staging record in the **CI_APAY_STAGE_UP_REM** table. In this case, the record may contain more than one error code.

The status of the automatic payment clearing staging record is set to **Pending**. If the error code (i.e. payment cancelation reason or NOC reason) is invalid, the status of the automatic payment clearing staging record is set to **Error**. An exception is logged in the **CI_APAY_STGUP_EXC** table. In addition, if the status of the NOC reason is **Inactive** in the system, the status of the automatic payment clearing staging record is set to **Error** and an exception is logged in the **CI_APAY_STGUP_EXC** table.

The system sets the automatic payment distribution and freeze date (i.e. **APAY_DIST_FRZ_DT**) for each automatic payment clearing record (for which automatic payment clearing staging record is added in the system) to the payment date (which is stored on the payment event). For more information about the batch, see *Oracle Revenue Management and Billing Batch Guide*.

Note: An additional table named **CI_APAY_STGUP_CHAR** is available which the implementation team can use to store additional information about the automatic payment clearing staging record in the form of characteristics.

To ensure that the EDI 824 files are uploaded successfully, you need to set the following parameters in an algorithm which is created using the **C1-APAY** algorithm type:

- **Line Separator** - Used to indicate the character specified in the EDI 824 files to represent the end of line.
- **Field Separator** - Used to indicate the character specified in the EDI 824 files to represent the end of data record.
- **Reject Upload Reason** - Used to indicate the upload reason which you want to use when the auto clearing house has rejected the automatic payment clearing record.
- **Success Upload Reason** - Used to indicate the upload reason which you want to use when the auto clearing house has accepted the automatic payment clearing record with or without Notice to Change (NOC).

Note: You must specify an upload reason which is already defined in the system.

For more information about the EDI 824 file format, see EDI 824 File Format on page 1354.

Retry Automatic Payment

In the Freeze Payments on Notification feature, the system enables you to freeze or cancel the automatic payment based on the review comments received from the auto clearing house. Until now, the system did not allow to resend the

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automatic payment clearing records to the auto clearing house for review in case of rejection. Now, the system enables you to resend the rejected automatic payment clearing records to the auto clearing house for review.

To enable this feature, you need to set the **C1-APMSG** characteristic type for the required divisions. Here, you must set the maximum automatic payment reattempts allowed while using the Freeze Payments on Notification feature.

A new batch named **C1-APRCH** is introduced in this release. You need to execute this batch in between the following two batches - **C1-APACK** and **APAYRA**. The **C1-APRCH** batch considers the automatic payment clearing staging records which are in the **Pending** status from the **CI_APAY_STAGE_UP** table. The system then checks whether the **APAY_UPL_RSN_TYPE** column corresponding to the automatic payment clearing staging record is set to **SUCC** or **CANC**. If the **APAY_UPL_RSN_TYPE** column corresponding to the automatic payment clearing staging record is set to **SUCC**, the system updates the last extract date of the automatic payment clearing staging record to the extract date which is available corresponding to the clearing record in the **CI_APAY_CLR_STG** table. However, if the **APAY_UPL_RSN_TYPE** column corresponding to the automatic payment clearing staging record is set to **CANC**, the system checks whether the number of automatic payment clearing staging records for the clearing record is equal to or greater than one. If the number of automatic payment clearing staging records for the clearing record is equal to or greater than one, the system increments the retry count of the clearing ID. If the retry count is greater than zero and less than the maximum automatic payment reattempt limit defined for the division, the system does the following:

- Recalculates the extract date and stamps it against the corresponding clearing record in the **SCHED_EXTRACT_DT** column of the **CI_APAY_CLR_STG** table
- Clears the **BATCH_NBR** column of the corresponding clearing record in the **CI_APAY_CLR_STG** table
- Clears the **APAY_DIST_FRZ_DT** column of the corresponding clearing record in the **CI_APAY_CLR_STG** table

Finally, the status of the automatic payment clearing staging record is set to **RETR**. A To Do is created using the **C1-APRET** To Do type to notify that the status of an automatic payment clearing staging record is changed to **RETR**.

Freezing or Canceling Automatic Payments

Once the review comments are received in the form of reason and error codes for an automatic payment clearing record, you need to freeze or cancel the automatic payment based on the reason code. You can freeze or cancel automatic payments through the **Freeze or Cancel Automatic Payments (APAYRA)** batch.

On executing the **Freeze or Cancel Automatic Payments (APAYRA)** batch, the system checks whether the reason code (i.e. upload reason) and error code (i.e. payment cancelation reason or NOC reason) specified in the automatic payment clearing staging record exist in the system. This batch considers only those automatic payment clearing staging records which are in the **Pending** status and for which payment freeze date is specified in the automatic payment clearing record. If the reason code and error code exist in the system, the system executes the algorithms attached to the reason code in the specified sequence. If the type of reason code is **Cancel**, the attached algorithm cancels the automatic payment and payment event. If the type of reason code is **Success**, the attached algorithm freezes the automatic payment on the payment freeze date. However, if the type of reason code is **Success** and the error code is specified along with the reason code, the attached algorithm freezes the automatic payment on the payment freeze date, stores error codes (i.e. NOC reasons) as payment tender characteristics and then creates a To Do entry to notify user about these NOC reasons. Finally, the status of the automatic payment clearing staging record is changed to **Complete**.

If the reason code and/or error code (i.e. upload reason, payment cancelation reason, or NOC reason) specified in the automatic payment clearing staging record does not exist in the system, the status of the automatic payment clearing staging record is changed to **Error**. In addition, if the status of the NOC reason is **Inactive** in the system, the status of the automatic payment clearing staging record is changed to **Error**. For more information about the batch, see *Oracle Revenue Management and Billing Batch Guide*.

Voiding Refund Requests and Canceling Refund Adjustments

Once the auto clearing house reviews the automatic refund clearing records and shares the review comments, the implementation team will have to store the review comments in the following staging tables:

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- **CI_APAY_STAGE_UP** - Used to store the automatic payment or refund clearing staging record for an automatic payment or refund clearing record, respectively. The status of the automatic payment or refund clearing staging record must be set to **Pending**.
- **CI_APAY_STAGE_UP_REM** - Used to store the reason and error codes of each automatic payment or refund clearing staging record.
- **CI_APAY_STGUP_CHAR** - Used to store additional information about the automatic payment or refund clearing staging record in the form of characteristics.

The review comments must be received in the form of reason (i.e. upload reason) and error codes (i.e. void status reason) for an automatic refund clearing record. On executing the **Cancel Automatic Refunds (AREFRA)** batch, it checks whether the reason and error codes specified in the automatic refund clearing staging record exist in the system. If the reason and error codes exist in the system, the system executes the algorithms attached to the reason code in the specified sequence. If the type of reason code is **Cancel**, the attached algorithm changes the status of the refund request to **Voided** and the corresponding refund adjustments are canceled. If the type of reason code is **Success**, no changes are made to the refund request and refund adjustments. Finally, the status of the automatic refund clearing staging record is changed to **Complete**.

If the reason code and/or error code (i.e. upload reason, void status reason) specified in the automatic refund clearing staging record does not exist in the system, the status of the automatic refund clearing staging record is changed to **Error**.

Generating To Do Entries

If an exception occurs while executing the **Freeze or Cancel Automatic Payments (APAYRA)** batch, you can notify the user about such exception. The **To Do Creation for Automatic Payment Exception Records (APAYUPTD)** batch allows you to create a To Do using the **APAYUPTD** To Do type when an exception is logged for an automatic payment clearing staging record in the **CI_APAY_STGUP_EXC** table. The system creates one To Do entry for all exceptions that have occurred for an automatic payment clearing staging record. For more information about these batches, see *Oracle Revenue Management and Billing Batch Guide*.

Note: At present, a To Do is not created when an exception is logged for an automatic refund clearing staging record in the **CI_APAY_STGUP_EXC** table while executing the **Cancel Automatic Refunds (AREFRA)** batch.

Creating Tender Controls

Once you freeze the automatic payments, you need to create tender and deposit controls. The **Create Tender Controls for Automatic Payments (BALAPY)** batch allows you to create tender and deposit controls for each automatic payment which is frozen, but not yet linked to any tender control. One tender control is created for the **APAYACH** batch control and batch run number combination. The payment tenders of these automatic payments are then linked to the tender control.

This batch also balances the open tender control records and changes the status of the tender and deposit controls, accordingly. For more information about the batch, see *Oracle Revenue Management and Billing Batch Guide*.

Prerequisites

To setup the freeze payments on notification process, you need to do the following:

- Define the automatic payment instructions for the account for which you want to enable the automatic payment option.

  Note: You can either define non-rule based effective dated automatic payment instructions in the **Auto Pay** tab of the **Account** screen or define rule based effective dated automatic payment instructions through the **Auto Pay Rule** screen.

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- Set the **Autopay Creation Option** field to **Freeze Payment on Notification** in the **Billing** tab of the **Installation Options** screen.
- Create an automatic payment creation algorithm using the **APAY-CREATE** algorithm type and attach it to the **Automatic Payment Creation** system event in the **Algorithms** tab of the **Installation Options - Framework** screen.
- Create an automatic refund creation algorithm using the **C1-AREF-CRET** algorithm type and attach it to the **Automatic Adjustment Creation** system event in the **Algorithms** tab of the **Installation Options - Framework** screen.
- Create a date calculation algorithm using the **APAY-DTCALC** algorithm type and attach it to the **Autopay Date Calculation Alg** spot of the auto pay route type which is specified on the account's automatic payment instruction.
- Define the required upload reasons in the system.
- Define the required payment cancelation reasons in the system.
- Define values for the **APAY_UPL_NOC_LOOKUP** lookup field.

  Note: The **APAY_UPL_NOC_LOOKUP** lookup field is used to define NOC reasons. The NOC reason specified in the automatic payment clearing staging record must exists in this lookup field and its status must be **Active**. Otherwise, the status of the automatic payment clearing staging record is changed to **Error**.
- Define voided status reasons for the **C1-RefundReq** business object.
- Create an automatic payment success algorithm using the **C1-APAY-SUCC** algorithm type and attach it to the reason code where the reason type is set to **Success**.

  Note: You must attach the automatic payment success algorithm to an upload reason which you want to use while freezing automatic payments.
- Create an automatic payment cancel algorithm using the **C1-APAY-CAN** algorithm type and attach it to the reason code where the reason type is set to **Cancel**.

  Note: You must attach the automatic payment cancel algorithm to an upload reason which you want to use while canceling automatic payments.
- Create a void automatic refund algorithm using the **C1-AREF-VOID** algorithm type and attach it to the reason code where the reason type is set to **Cancel**.

  Note: You must attach the void automatic refund algorithm to an upload reason which you want to use while voiding automatic refunds.
- Create a characteristic type where the characteristic entity is set to **Payment Tender**. And, then specify this characteristic type as the value for the **Tender Characteristic Type** parameter in an algorithm which is created using the **C1-APAY-SUCC** algorithm type.
- Assign the **C1-ACH** To Do type to a To Do role whose users must receive the To Do entries generated when automatic payments are frozen with a Notice to Change (NOC).
- Assign the **APAYUPTD** To Do type to a To Do role whose users must receive the To Do entries generated when exceptions have occurred while executing the **Freeze or Cancel Automatic Payments (APAYRA)** batch.
- Define values for the following parameters in an algorithm which is created using the **C1-APAY** algorithm type:
  - Line Separator
  - Field Separator
  - Reject Upload Reason
  - Success Upload Reason

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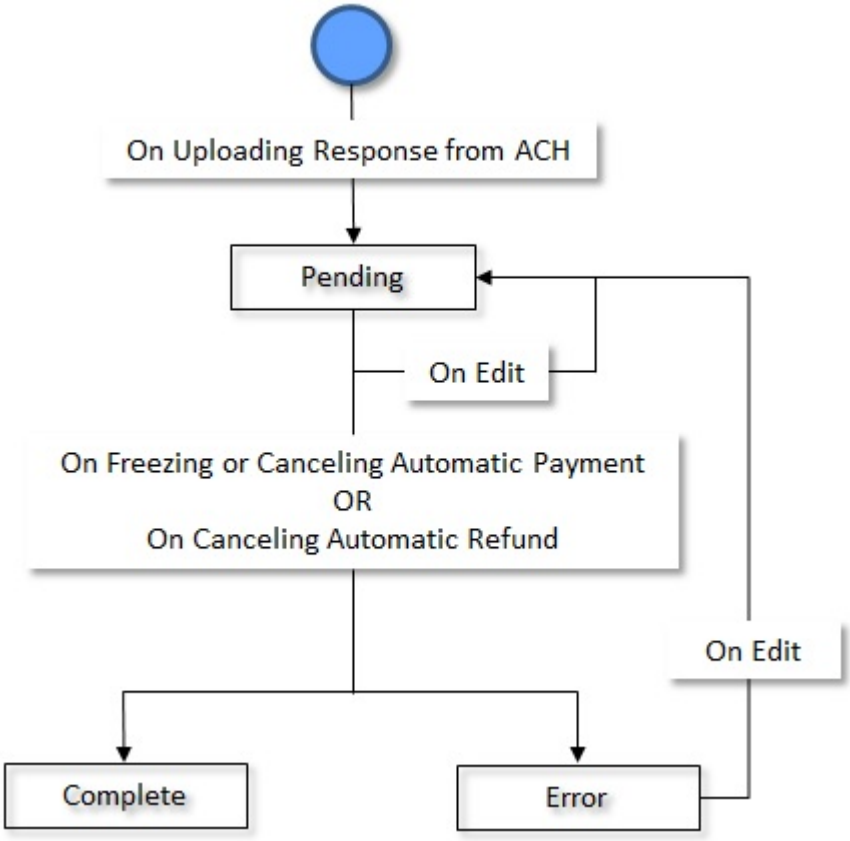
Automatic Payment or Refund Clearing Staging Record Status Transition

The following figure graphically indicates how an automatic payment or refund clearing staging record moves from one status to another during the freeze payments on notification process:



EDI 824 File Format

Before uploading the EDI 824 file, you need to ensure that the file contains the following tags and attributes:

Tag	Attribute	Description	Mandatory (Yes or No)
OTI	Reference Number	Used to specify the automatic payment clearing ID. It indicates the automatic payment clearing record for which the review comments are received from the auto clearing house.	Yes
OTI	Acknowledgement Code	Used to indicate whether the automatic payment clearing record is accepted or rejected by the auto clearing house. If you want to reject the automatic payment clearing record, you must specify **TE** or **TR** as the acknowledgement code. However, if you want to approve the automatic payment clearing record, you can	No

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Tag	Attribute	Description	Mandatory (Yes or No)
		either specify any value other than **TE** or **TR** or leave this attribute blank.	
TED	Error Code	Used to indicate either of the following: • The payment cancelation reason when the automatic payment clearing record is rejected by the auto clearing house. **Note:** You must specify a payment cancelation reason which is already defined in the system. • The Notice to Change (NOC) reason when the automatic payment clearing record is accepted by the auto clearing house with a Notice to Change (NOC). **Note:** You must specify a NOC reason which is already defined in the **APAY_UPL_NOC_LOOKUP** lookup field.	Yes (Conditional) **Note:** This attribute is required when the automatic payment clearing record is rejected by the auto clearing house.
TED	Error Description	Used to specify the reason why the automatic payment clearing record is either rejected or accepted with a Notice to Change (NOC).	No

Sample EDI 824 File Format

OTI*TR*TN*411302586842\

TED*WA01*WRONG ACCOUNT\

OTI*TF*TN*411302525641\

OTI*TO*TN*806152348038\

TED*BR01*Bill Reopened\

OTI*TO*TN*806152307159\

OTI*TE*TN*806152307229\

TED*WA01*WRONG ACCOUNT\

Here, TR, TF, TO, and TE are acknowledgement codes. TR and TE indicate that the automatic payment clearing records are rejected. And, TF and TO indicate that the automatic payment clearing records are accepted with or without a Notice to Change (NOC).

Here, 411302586842, 411302525641, 806152348038, 806152307159, and 806152307229 are automatic payment clearing records, and WA01 and BR01 are error codes. WA01 is a payment cancelation reason and BR01 is a NOC reason. The string "WRONG ACCOUNT" and "Bill Reopened" are error descriptions.

For more information about the EDI 824 file format, see EDI 824 File Format on page 1354.

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Automatic Payment and Refund Upload Reason

Once the auto clearing house reviews the automatic payment and refund clearing records, an appropriate upload reason must be received for each clearing record. The upload reason indicates the following:

- Whether the automatic payment must be frozen or cancelled in the system
- Whether the automatic refund must be canceled in the system (i.e. the refund request must be voided and refund adjustments must be canceled)

The **Automatic Payment and Refund Upload Reason** screen allows you to define, edit, and delete an upload reason. It contains the following zone:

- Upload Reasons on page 1356

Upload Reasons

The **Upload Reasons** zone lists upload reasons that are already defined in the system. It contains the following columns:

Column Name	Column Description
Upload Reason	Displays the upload reason.
Reason Type	Indicates the type of upload reason. The valid values are: • Cancel • Success
Eligible for Processing	Indicates whether the algorithms attached to the upload reason must be triggered while executing the **Freeze or Cancel Automatic Payments (APAYRA)** or **Cancel Automatic Refunds (AREFRA)** batch. The valid values are: • Y • N
Description	Displays the description of the upload reason.
Edit	On clicking the **Edit** (✎) icon, the **Automatic Payment and Refund Upload Reason** screen appears where you can edit the details of the upload reason.
Delete	On clicking the **Delete** (🗑) icon, you can delete the upload reason.

You can define an upload reason by clicking the **Add** link in the upper right corner of this zone.

Related Topics

For more information on...	See...
How to define an upload reason	Defining an Upload Reason on page 1356
How to edit an upload reason	Editing an Upload Reason on page 1358
How to delete an upload reason	Deleting an Upload Reason on page 1360

Defining an Upload Reason

Prerequisites

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To define an upload reason, you should have:

- Automatic payment success algorithm defined using the **C1-APAY-SUCC** algorithm type
- Automatic payment cancel algorithm defined using the **C1-APAY-CAN** algorithm type
- Void automatic refund algorithm defined using the **C1-AREF-VOID** algorithm type

Procedure

To define an upload reason:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **A** and then click **Automatic Payment and Refund Upload Reason**.
   The **Automatic Payment and Refund Upload Reason** screen appears.
3. Click the **Add** link in the upper right corner of the **Upload Reasons** zone.

   The **Automatic Payment and Refund Upload Reason** screen appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Upload Reason	Used to specify the upload reason.	Yes
Description	Used to specify the description for the upload reason.	Yes
Reason Type	Used to indicate the type of upload reason. The valid values are: • **Cancel** - This type of upload reason indicates that you must cancel the automatic payment or refund in the system. In this case, the error code indicates the reason why the automatic payment is cancelled or the refund request is voided. • **Success** - This type of upload reason indicates that you must freeze the automatic payment on the payment freeze date. If the error code is specified, it indicates that you must freeze the automatic payment, and at the same time notify user that the automatic payment is accepted with a Notice to Change (NOC). The NOC reason is stored as payment tender characteristic in the system. You can specify more than one error code (i.e. NOC reasons) with this type of upload reason. On freezing an automatic payment, the user is notified about these NOC reasons through a To Do entry. The system creates one To Do entry using the **C1-ACH** To Do type for all NOC reasons specified in the automatic payment clearing staging record.	Yes
Eligible for Processing	Used to indicate whether the algorithms attached to the upload reason must be triggered while executing the **Freeze or Cancel Automatic Payments (APAYRA)** or **Cancel Automatic Refunds (AREFRA)** batch.	No

In addition, this screen contains a grid where you can attach algorithms to the upload reason. It contains the following columns:

Column Name	Column Description	Mandatory (Yes or No)
Sequence	Used to indicate the order in which the algorithm must be triggered.	Yes (Conditional)

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Column Name	Column Description	Mandatory (Yes or No)
		Note: This field is required when you are attaching an algorithm to the upload reason.
Algorithm	Used to attach an algorithm to the upload reason. If the type of the upload reason is set to **Success**, you must attach the automatic payment success algorithm. However, if the type of the upload reason is set to **Cancel**, you must attach either automatic payment cancel or void automatic refund algorithm depending on whether the upload reason will be used for automatic payment or automatic refund cancelation.	Yes (Conditional) **Note:** This field is required when you are attaching an algorithm to the upload reason.
	Note: The **Search** (🔍) icon appears corresponding to this field. On clicking the **Search** icon, the **Algorithm Code Search** window appears. On specifying the algorithm code, the description of the algorithm appears corresponding to the **Algorithm** field.	

4. Enter the required details in the **Automatic Payment and Refund Upload Reason** screen.

Note: If you want to attach more than one algorithm to the upload reason, click the **Add** (+) icon and then specify the details. However, if you want to remove an algorithm from the upload reason, click the **Delete** (🗑) icon corresponding to the algorithm.

5. Click **Save**.
   The upload reason is defined.

Related Topics

For more information on...	See...
Automatic Payment and Refund Upload Reason screen	Automatic Payment and Refund Upload Reason on page 1356
Upload Reasons zone	Upload Reasons on page 1356

Editing an Upload Reason

Prerequisites

To edit an upload reason, you should have:

- Automatic payment success algorithm defined using the **C1-APAY-SUCC** algorithm type
- Automatic payment cancel algorithm defined using the **C1-APAY-CAN** algorithm type
- Void automatic refund algorithm defined using the **C1-AREF-VOID** algorithm type

Procedure

To edit an upload reason:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.

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2. From the **Admin** menu, select **A** and then click **Automatic Payment and Refund Upload Reason**.
   The **Automatic Payment and Refund Upload Reason** screen appears.
3. In the **Upload Reasons** zone, click the **Edit** (✎) icon in the **Edit** column corresponding to the upload reason *w*hose details you *w*ant to edit.

   The **Automatic Payment and Refund Upload Reason** screen appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Upload Reason	Displays the upload reason.	Not applicable
Description	Used to specify the description for the upload reason.	Yes
Reason Type	Used to indicate the type of upload reason. The valid values are: • **Cancel** - This type of upload reason indicates that you must cancel the automatic payment or refund in the system. In this case, the error code indicates the reason why the automatic payment is cancelled or the refund request is voided. • **Success** - This type of upload reason indicates that you must freeze the automatic payment on the payment freeze date. If the error code is specified, it indicates that you must freeze the automatic payment, and at the same time notify user that the automatic payment is accepted with a Notice to Change (NOC). The NOC reason is stored as payment tender characteristic in the system. You can specify more than one error code (i.e. NOC reasons) with this type of upload reason. On freezing an automatic payment, the user is notified about these NOC reasons through a To Do entry. The system creates one To Do entry using the **C1-ACH** To Do type for all NOC reasons specified in the automatic payment clearing staging record.	Yes
Eligible for Processing	Used to indicate whether the algorithms attached to the upload reason must be triggered while executing the **Freeze or Cancel Automatic Payments (APAYRA)** or **Cancel Automatic Refunds (AREFRA)** batch.	No

In addition, this screen contains a grid where you can attach algorithms to the upload reason. It contains the following columns:

Column Name	Column Description	Mandatory (Yes or No)
Sequence	Used to indicate the order in which the algorithm must be triggered.	Yes (Conditional) **Note:** This field is required when you are attaching an algorithm to the upload reason.
Algorithm	Used to attach an algorithm to the upload reason. If the type of the upload reason is set to **Success**, you must attach the automatic payment success algorithm. However, if the type of the upload reason is set to **Cancel**, you must attach either automatic payment	Yes (Conditional) **Note:** This field is required when you are attaching an algorithm to the upload reason.

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Column Name	Column Description	Mandatory (Yes or No)
	cancel or void automatic refund algorithm depending on whether the upload reason will be used for automatic payment or automatic refund cancelation.	
	Note: The **Search** (🔍) icon appears corresponding to this field. On clicking the **Search** icon, the **Algorithm Code Search** window appears. On specifying the algorithm code, the description of the algorithm appears corresponding to the **Algorithm** field.	

4. Modify the required details in the **Automatic Payment and Refund Upload Reason** screen.

Note: If you want to attach more than one algorithm to the upload reason, click the **Add** (+) icon and then specify the details. However, if you want to remove an algorithm from the upload reason, click the **Delete** (🗑) icon corresponding to the algorithm.

5. Click **Save**.
   The changes made to the upload reason are saved.

Related Topics

For more information on...	See...
Automatic Payment and Refund Upload Reason screen	Automatic Payment and Refund Upload Reason on page 1356
Upload Reasons zone	Upload Reasons on page 1356

Deleting an Upload Reason

Procedure

To delete an upload reason:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **A** and then click **Automatic Payment and Refund Upload Reason**.
   The **Automatic Payment and Refund Upload Reason** screen appears.
3. In the **Upload Reasons** zone, click the **Delete** (🗑) icon in the **Delete** column corresponding to the upload *r*eason that you want *t*o delete.
   A message appears confirming whether you want to delete the upload reason.
4. Click **OK**.
   The upload reason is deleted.

Related Topics

For more information on...	See...
Automatic Payment and Refund Upload Reason screen	Automatic Payment and Refund Upload Reason on page 1356
Upload Reasons zone	Upload Reasons on page 1356

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Automatic Payment and Refund Clearing Staging

The **Automatic Payment and Refund Clearing Staging** screen allows you to search for automatic payment or refund clearing records using various search criteria. In addition, you can:

- View the automatic payment or refund clearing staging records associated to a clearing record
- View the upload reason and payment cancelation reason or NOC reason specified in the automatic payment clearing staging record
- View the upload reason and void status reason specified in the automatic refund clearing staging record
- View the characteristics of the automatic payment or refund clearing staging record
- Edit an automatic payment or refund clearing staging record
- Delete an automatic payment or refund clearing staging record

This screen contains the following zones:

- Search Clearing Record on page 1361
- Associated Clearing Staging Records on page 1363
- Clearing Staging Upload Reasons on page 1364
- Clearing Staging Characteristics on page 1365

Search Clearing Record

The **Search Clearing Record** zone allows you to search for automatic payment and refund clearing records using various search criteria. It contains the following two sections:

- **Search Criteria** - the **Search Criteria** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Search By	Used to indicate whether you want to search for the automatic payment or refund clearing records. The valid values are: • Automatic Payment • Automatic Refund	Yes
Clearing ID	Used to search a particular clearing record.	No
Account ID	Used to search clearing records which are created for a particular account. **Note:** The **Search** (🔍) icon appears corresponding to this field. On clicking the **Search** icon, the **Account Search** window appears.	No
Person Name	Used to search clearing records which are created for accounts of a particular person.	No
Extract From Date	Used to search clearing records that are extracted on or after a particular date.	No
Extract To Date	Used to search clearing records that are extracted on or before a particular date.	No

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Field Name	Field Description	Mandatory (Yes or No)
Bill ID	Used to search clearing records which are created against a bill.	No
Alternate Bill ID	Used to search clearing records which are created against a bill with the specified alternate bill ID.	No
Batch Control	Used to search clearing records where the **APAYACH** batch control is stamped. The valid value is **APAYACH**.	No
Batch Run Number	Used to search clearing records which are activated in a particular batch run.	No

Note: You must specify at least one search criterion while searching for a clearing record.

- **Search Results** - On clicking the **Search** button, the search results appear based on the specified search criteria. The **Search Results** section contains the following columns:

Column Name	Column Description
Clearing ID	Displays the clearing ID.
Account Information	Indicates the account for which the clearing record is created. In addition, this column has a context menu which helps in navigating to other screens in the application.
	Note: It has a link. On clicking the link, the **Account** screen appears with the details of the respective account.
Bill Information	Indicates the bill against which the clearing record is created. In addition, this column has a context menu which helps in navigating to other screens in the application.
	Note: It has a link. On clicking the link, the **Bill** screen appears with the details of the respective bill.
Payment Amount	Displays the payment amount.
	Note: This column appears only when you select the **Automatic Payment** option from the **Search By** list.
Pay Tender ID	Displays the payment tender ID.
	Note: It has a link. On clicking the link, the **Payment Event** screen appears where you can view the details of the respective tender. This column appears when you select the **Automatic Payment** option from the **Search By** list.
Tender Status	Indicates the current status of the payment tender. The valid values are: • Valid • Canceled
	Note: This column appears when you select the **Automatic Payment** option from the **Search By** list.

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Column Name	Column Description
Extract Date	Displays the date when the clearing record is extracted in a flat file.
Payment Freeze Date	Displays the date when the automatic payment must be frozen in the system. **Note:** This column appears when you select the **Automatic Payment** option from the **Search By** list.
External Source ID	Indicates the tender source through which the payment was remitted.
Entity Type	Indicates the type of entity which is created for automatic refund. The valid value is: • Refund Request **Note:** This column appears when you select the **Automatic Refund** option from the **Search By** list.
Entity ID	Displays the entity ID. **Note:** This column appears when you select the **Automatic Refund** option from the **Search By** list.
Account Number	Indicates the bank account through which the automatic payment is made.
Batch Control	Indicates the batch control which is stamped on the clearing record.
Batch Run Number	Indicates the batch run in which the clearing record was activated.
Alternate Bill ID	Indicates the bill against which the clearing record is created.

Related Topics

For more information on...	See...
How to search for a clearing record	Searching for a Clearing Record on page 1365

Associated Clearing Staging Records

The **Associated Clearing Staging Records** zone lists the automatic payment or refund clearing staging records which are added corresponding to the clearing record. You can edit and delete an automatic payment or refund clearing staging record through this zone. It contains the following columns:

Column Name	Column Description
Clearing Staging ID	Displays the clearing staging ID.
Clearing ID	Indicates the clearing record against which the clearing staging record is added.
Status	Indicates the status of the clearing staging record. The valid values are: • Pending • Complete • Error
Edit	On clicking the **Edit** (✎) icon, the **Edit Clearing Staging Record** screen appears where you can edit the details of the clearing staging record. **Note:** You can edit a clearing staging record when it is in the **Pending** or **Error** status.

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Column Name	Column Description
Delete	On clicking the **Delete** (🗑) icon, you can delete the clearing staging record.
	Note: You can delete a clearing staging record when it is in the **Pending** status.

By default, the **Associated Clearing Staging Records** zone does not appear in the **Automatic Payment and Refund Clearing Staging** screen. It appears when you click the **Broadcast** (📡) icon corresponding to the clearing record in the **Search Clearing Record** zone.

Related Topics

For more information on...	See...
How to view the clearing staging records associated to a clearing record	Viewing the Clearing Staging Records Associated to a Clearing Record on page 1366
How to edit a clearing staging record	Editing a Clearing Staging Record on page 1367
How to delete a clearing staging record	Deleting a Clearing Staging Record on page 1370

Clearing Staging Upload Reasons

The **Clearing Staging Upload Reasons** zone lists the reason code (i.e. upload reason) and error code (i.e. payment cancelation reason, Notice to Change (NOC) reasons, or void status reason) specified in the automatic payment or refund clearing staging record. It contains the following columns:

Column Name	Column Description
Sequence	Indicates the sequence in which the upload reason should be considered while freezing or canceling the automatic payment or while canceling the automatic refund.
Clearing Staging ID	Displays the clearing staging ID.
Clearing ID	Indicates the clearing record against which the clearing staging record is added.
Upload Reason	Indicates whether the auto clearing house has accepted or rejected the clearing record.
Cancel Reason	Indicates the reason why the auto clearing house has rejected the clearing record. If the clearing record is created for an automatic payment, the payment cancelation reason appears in this column. However, if the clearing record is created for an automatic refund, the void status reason appears in this column.
NOC Reason	Indicates the reason why the auto clearing house has accepted the clearing record with a Notice to Change (NOC).
NOC Reason Description	Displays the description of the NOC reason.

By default, the **Clearing Staging Upload Reasons** zone does not appear in the **Automatic Payment and Refund Clearing Staging** screen. It appears when you click the **Broadcast** (📡) icon corresponding to the clearing staging record in the **Associated Clearing Staging Records** zone.

Related Topics

For more information on...	See...
How to view the upload reason specified in the clearing staging record	Viewing the Upload Reason Specified in the Clearing Staging Record on page 1366

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Clearing Staging Characteristics

The **Clearing Staging Characteristics** zone lists the characteristics of the automatic payment or refund clearing staging record. It contains the following columns:

Column Name	Column Description
Clearing Staging ID	Displays the clearing staging ID.
Clearing ID	Indicates the clearing record against which the clearing staging record is added.
Characteristic Type	Indicates the characteristic type.
Characteristic Value	Displays the characteristic value.

By default, the **Clearing Staging Characteristics** zone does not appear in the **Automatic Payment and Refund Clearing Staging** screen. It appears when you click the **Broadcast** ( ) icon corresponding to the clearing staging record in the **Associated Clearing Staging Records** zone.

Related Topics

For more information on...	See...
How to view the characteristics of the clearing staging record	Viewing the Characteristics of the Clearing Staging Record on page 1366

Searching for a Clearing Record

Procedure

To search for a clearing record:

1. Click the **Menu** link in the **Application** toolbar.
   A list appears.
2. From the **Main** menu, select **Payments** and then click **Automatic Payment and Refund Clearing Staging**.
   The **Automatic Payment and Refund Clearing Staging** screen appears.
3. Enter the search criteria in the **Search Clearing Record** zone depending on whether you want to search for *a*utomatic payment or refund clearing records.

   Note: ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.
4. Click **Search**.
   A list of clearing records that meet the search criteria appears in the **Search Results** section.

Related Topics

For more information on...	See...
Automatic Payment and Refund Clearing Staging screen	Automatic Payment and Refund Clearing Staging on page 1361
Search Clearing Record zone	Search Clearing Record on page 1361

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Viewing the Clearing Staging Records Associated to a Clearing Record

Procedure

To view the clearing staging records associated to a clearing record:

1. Search for the clearing record in the **Automatic Payment and Refund Clearing Staging** screen.
2. In the **Search Results** section, click the **Broadcast** (📡) icon corresponding to the clearing record whose *a*ssociated clearing staging records you want to view.
   The **Associated Clearing Staging Records** zone appears.
3. View the details of the clearing staging records in the **Associated Clearing Staging Records** zone.

Related Topics

For more information on...	**See...**
How to search for a clearing record	Searching for a Clearing Record on page 1365
Associated Clearing Staging Records zone	Associated Clearing Staging Records on page 1363

Viewing the Upload Reason Specified in the Clearing Staging Record

Procedure

To view the upload reason specified in the clearing staging record:

1. Search for the clearing record in the **Automatic Payment and Refund Clearing Staging** screen.
2. In the **Search Results** section, click the **Broadcast** (📡) icon corresponding to the clearing record whose *a*ssociated clearing staging records you want to view.
   The **Associated Clearing Staging Records** zone appears.
3. In the **Associated Clearing Staging Records** zone, click the **Broadcast** (📡) icon corresponding to the clearing *s*taging record whose details you want to view.
   The **Clearing Staging Upload Reasons** and **Clearing Staging Characteristics** zones appear.
4. View the reason and error codes specified in the clearing staging record in the **Clearing Staging Upload *R*easons** zone.

Related Topics

For more information on...	**See...**
How to search for a clearing record	Searching for a Clearing Record on page 1365
Associated Clearing Staging Records zone	Associated Clearing Staging Records on page 1363
Clearing Staging Upload Reasons zone	Clearing Staging Upload Reasons on page 1364

Viewing the Characteristics of the Clearing Staging Record

Procedure

To view the characteristics of the clearing staging record:

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1. Search for the clearing record in the **Automatic Payment and Refund Clearing Staging** screen.
2. In the **Search Results** section, click the **Broadcast** (📡) icon corresponding to the clearing record whose *a*ssociated clearing staging records you want to view.
   The **Associated Clearing Staging Records** zone appears.
3. In the **Associated Clearing Staging Records** zone, click the **Broadcast** (📡) icon corresponding to the clearing *s*taging record whose details you want to view.
   The **Clearing Staging Upload Reasons** and **Clearing Staging Characteristics** zones appear.
4. View the characteristics of the clearing staging record in the **Clearing Staging Characteristics** zone.

Related Topics

For more information on...	See...
How to search for a clearing record	Searching for a Clearing Record on page 1365
Associated Clearing Staging Records zone	Associated Clearing Staging Records on page 1363
Clearing Staging Characteristics zone	Clearing Staging Characteristics on page 1365

Editing a Clearing Staging Record

Prerequisites

To edit a clearing staging record, you should have:

- Upload reasons defined in the application
- NOC reasons defined in the **APAY_UPL_NOC_LOOKUP** lookup field.
- Payment cancelation reasons defined in the application
- Reasons defined for the **Voided** status of the **C1-RefundReq** business object in the **Status Reason** screen

Note: You can edit a clearing staging record when it is in the **Pending** or **Error** status. On editing a clearing staging record which is in the **Error** status, the status of the clearing staging record is changed to **Pending**. Also, the exceptions logged for the clearing staging record are deleted from the **CI_APAY_STGUP_EXC** table.

Procedure

To edit a clearing staging record:

1. Search for the clearing record in the **Automatic Payment and Refund Clearing Staging** screen.
2. In the **Search Results** section, click the **Broadcast** (📡) icon corresponding to the clearing record whose *a*ssociated clearing staging record you want to edit.
   The **Associated Clearing Staging Records** zone appears.
3. In the **Associated Clearing Staging Records** zone, click the **Edit** (✎) icon in the **Edit** column corresponding *t*o the clearing staging record whose details you want to edit.

   The **Edit Clearing Staging Record** screen appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Clearing Staging ID	Displays the clearing staging ID.	Not applicable
Clearing ID	Indicates the clearing record against which the clearing staging record is added.	Not applicable
Status	Indicates the status of the clearing staging record. The valid values are: • Pending	Not applicable

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Field Name	Field Description	Mandatory (Yes or No)
	• Complete • Error	
Upload Date	Used to specify the date when the clearing staging record was uploaded or added in the system.	Yes

In addition, this screen contains the following two sections:

- **Upload Reasons** - Used to add, edit, or remove the reason code (i.e. upload reason) and error (sub reason) codes from the clearing staging record. It contains the following fields in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Upload Reason	Used to specify the upload reason. It indicates whether the auto clearing house has accepted or rejected the clearing record.	Yes
Reason Type	Used to indicate the type of upload reason. The valid values are: • Cancel • Success	Yes
Sub Reason Code	Used to specify either of the following: • Payment cancelation reason or void status reason (for automatic refund) when the reason type is set to **Cancel** • Notice to Change (NOC) reason when the reason type is set to **Success**	No
Sub Reason Description	Used to specify the description of the NOC reason.	No

Note: The upload reason, payment cancelation reason, void status reason, and NOC reasons must be already defined in the system. If you specify an invalid reason and sub reason codes, the status of the clearing staging record is changed to **Error** when you execute the **Freeze or Cancel Automatic Payments (APAYRA)** or **Cancel Automatic Refunds (AREFRA)** batch.

- **Characteristics** - Used to define the characteristics for the clearing staging record.

4. Modify the required details in the **Edit Clearing Staging Record** screen.

Note: If you want to add more than one reason or sub reason code, click the **Add** (+) icon in the **Upload Reasons** section and then specify the required details. However, if you want to remove a reason or sub reason code, click the **Delete** (🗑) icon corresponding to the reason.

5. Define characteristics for the clearing staging record, if required.
6. Click **Save**.
   The changes made to the clearing staging record are saved.

Related Topics

For more information on...	See...
How to search for a clearing record	Searching for a Clearing Record on page 1365
Associated Clearing Staging Records zone	Associated Clearing Staging Records on page 1363

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For more information on...	See...
How to define a characteristic for a clearing staging record	Defining a Characteristic for a Clearing Staging Record on page 1369

Defining a Characteristic for a Clearing Staging Record

Prerequisites

To define a characteristic for a clearing staging record, you should have:

- Characteristic types defined in the application (where the characteristic entity is set to **Auto Payment Upload**)

Procedure

To define a characteristic for a clearing staging record:

1. Ensure that the **Characteristics** section is expanded when you are editing a clearing staging record.

   The **Characteristics** section contains the following fields in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Effective Date	Used to specify the date from when the characteristic is effective for the clearing staging record.	Yes (Conditional) **Note:** This field is required when you are defining a characteristic for the clearing staging record.
Characteristic Type	Used to indicate the characteristic type. **Note:** The list includes only those characteristic types where the characteristic entity is set to **Auto Payment Upload**.	Yes (Conditional) **Note:** This field is required when you are defining a characteristic for the clearing staging record.
Characteristic Value	Used to specify the value for the characteristic type. **Note:** On specifying the value for a predefined characteristic type, the description of the characteristic value appears corresponding to the **Characteristic Value** field.	Yes (Conditional) **Note:** This field is required when you are defining a characteristic for the clearing staging record.

2. Enter the required details in the **Characteristics** section.

   Note: If you select a predefined characteristic type, the **Search** (🔍) icon appears corresponding to the **Characteristic Value** field. On clicking the **Search** icon, you can search for a predefined characteristic value.

3. If you want to define more than one characteristic for the clearing staging record, click the **Add** (+) icon and *t*hen repeat step 2.

   Note: However, if you want to remove a characteristic from the clearing staging record, click the **Delete** (🗑) icon corresponding to the characteristic.

Related Topics

For more information on...	See...
How to edit a clearing staging record	Editing a Clearing Staging Record on page 1367

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Deleting a Clearing Staging Record

Procedure

To delete a clearing staging record:

1. Search for the clearing record in the **Automatic Payment and Refund Clearing Staging** screen.
2. In the **Search Results** section, click the **Broadcast** (📡) icon corresponding to the clearing record whose *a*ssociated clearing staging record you want to delete.
   The **Associated Clearing Staging Records** zone appears.
3. In the **Associated Clearing Staging Records** zone, click the **Delete** (🗑) icon in the **Delete** column *c*orresponding to the clearing staging record that you want to delete.
   A message appears confirming whether you want to delete the clearing staging record.

> **Note:** You can delete a clearing staging record when it is in the **Pending** status.

4. Click **OK**.
   The clearing staging record is deleted.

Related Topics

For more information on...	See...
How to search for a clearing record	Searching for a Clearing Record on page 1365
Associated Clearing Staging Records zone	Associated Clearing Staging Records on page 1363

Chapter 19

Trial Billing

Topics:

- Prerequisites
- Trial Bill (Used for Searching)
- Trial Bill (Used for Viewing)

Oracle Revenue Management and Billing facilitates you to generate trial bills before actual bill is generated for an account. This helps to review the trial bill and make the required corrections before the actual bill is generated. The Trial Billing feature is currently designed and developed for open item accounting and not for balance forward accounting.

The process of trial and actual billing is identical. The only difference is that you cannot freeze and complete the trial bills. Also, during trial billing, the account balance is not updated. It is updated when the actual bill is generated. You can generate trial bill only in case of regular billing, and not in case of adhoc billing. The trial bills can be generated only through the batch process. To generate trial bills, you need to execute the following batches in the specified order:

1. **Pending Bill Generation (C1-PNDBL)** - This batch is used to generate pending trial or actual bills for accounts that meet the criteria.
2. **Bill Segment Generation (C1-BLGEN)** - This batch is used to generate bill segments for pending trial or actual bills.
3. **Bill Completion (C1-BLPPR)** - This batch is used to generate post-processing bill segments in the pending trial or actual bills during the bill completion process. The adjustments, if any, created on the accounts are swept onto the pending trial or actual bills. In addition, the bill routing information and bill messages are stamped on the pending trial or actual bills. If the adjustment currency is different from the account's invoice currency, the transfer adjustment is created on the pending actual bill. However, in case of pending trial bill, the currency conversion for adjustments is done, but the transfer adjustments are not created. Finally, the status of the actual bill is set to **Complete**, whereas the status of the trial bill remains as **Pending**.

Note: The adjustments which are in the **Freezable** status are not swept onto the trial bills. Only adjustments which are in the **Frozen** status are swept onto the trial bills.

The **Trial Bill** check box is added in the **Main** tab of the **Account** screen. If you leave the **Process All or Selected Accounts** parameter blank while executing the above batches, all accounts (that meet the criteria) irrespective of whether the **Trial Bill** check box is selected or not are considered for generating the trial bills. However, if the **Process All or Selected Accounts** parameter is set to **Y**, then only those accounts that meet the criteria and where the **Trial Bill** check box is selected are considered for generating the trial bills.

You can create an actual bill using a trial bill. While creating actual bills using trial bills, you need to specify the trial billing batch run number whose trial bills you want to convert to the actual bills. To create actual bills using trial bills, you need to execute the following batches in the specified order:

1. **Pending Bill Generation (C1-PNDBL)** - This batch generates pending actual bill for accounts that meet the criteria.
2. **Bill Segment Generation (C1-BLGEN)** - This batch copies regular bill segments which are generated for the trial bill and stamps them onto the pending actual bill. It also copies the corresponding financial transactions (FTs).
3. **Bill Completion (C1-BLPPR)** - This batch copies post-processing bill segments which are generated for the trial bill and stamps them onto the pending actual bill. The bill routing information and bill messages are copied from the trial bill to the pending actual bill. The adjustment, if any, created on the account are swept onto the pending actual bill. They are not copied from the respective trial bill. If the adjustment currency is different from the account's invoice currency, the transfer adjustment is created on the pending actual bill. Finally, the status of the actual bill is set to **Complete**.

The actual bill ID, bill segment ID and FT ID are different from the trial bill ID, bill segment ID and FT ID, respectively. If an actual bill is created using a trial bill, the system will stamp the trial bill ID on the actual bill. This helps you to track the trial bill of an actual bill.

The system allows you to view a trial bill through a user interface. It also allows you to print the trial bill in the PDF format. You can print a trial bill when Oracle Documaker is integrated with Oracle Revenue Management and Billing. For more information about the batches, see *Oracle Revenue Management and Billing Batch Guide*.

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Prerequisites

To setup the trial billing feature, you need to do the following:

- Set the **Trial Bill Characteristics Conversion** option type of the **C1_FINTRANOP** feature configuration.

Related Topics

For more information on...	See...
How to setup the **C1_FINTRANOP** feature configuration	Setting the C1_FINTRANOP Feature Configuration on page 4446

Trial Bill (Used for Searching)

The **Trial Bill** screen allows you to search for a trial bill using various search criteria. It contains the following zone:

- Search Trial Bill on page 1373

Through this screen, you can navigate to the following screen:

- Trial Bill (Used for Viewing) on page 1376

Search Trial Bill

The **Search Trial Bill** zone allows you to search for trial bills using various search criteria. It contains the following two sections:

- **Search Criteria** - The criteria are grouped as indicated by line separators between the criteria. Each group is independent from the other, and only one group is used at a time for searching. If you enter criteria in more than one group, the criteria from the first group is used for searching. For example, if you enter the criteria in the Account ID and Trial Bill Description fields (which are in different criteria groups), the system searches for trial bills using the account ID. The **Search Criteria** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Search By	Used to indicate whether you want to search for a trial bill using the trial bill details. The valid value is: • Trial Bill Details **Note:** By default, the **Trial Bill Details** option is selected.	Yes
Person ID	Used to search trial bills which are generated for a particular person. **Note:** The **Search** (🔍) icon appears corresponding to this field. On clicking the **Search** icon, the **Person Search** window appears.	No
Trial Bill ID	Used to search for a particular trial bill.	No

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Field Name	Field Description	Mandatory (Yes or No)
Account ID	Used to search trial bills which are generated for a particular account. **Note:** The **Search** (🔍) icon appears corresponding to this field. On clicking the **Search** icon, the **Account Search** window appears.	No
Division	Used to search trial bills which are generated for accounts belonging to a particular division.	No
From Trial Bill Date	Used to search trial bills which are generated from a particular date onwards.	No
Invoice Currency	Used to search trial bills which are generated in a particular invoice currency.	No
To Trial Bill Date	Used to search trial bills which are generated till a particular date.	No
Batch Run Date	Used to search trial bills which are generated on a particular batch run date.	No
Trial Bill Description	Used to search trial bills which are generated in a particular batch run.	Yes (Conditional) **Note:** This field is required when you are searching for trial bills using the batch run date.

Note: You must specify at least one search criterion while searching for a trial bill.

- **Search Results** - On clicking the **Search** button, the search results appear based on the specified search criteria. The **Search Results** section contains the following columns:

Column Name	Column Description
Trial Bill Information	Displays additional information about the trial bill. **Note:** It has a link. On clicking the link, the **Trial Bill** screen appears where you can view the details of the respective trial bill.
Current Charges	Displays the trial bill amount.
Account Information	Indicates the account for which the trial bill is generated. In addition, this column has a context menu which helps in navigating to other screens in the application. **Note:** It has a link. On clicking the link, the **Account** screen appears with the details of the respective account.
Person Name	Indicates the person for whom the trial bill is generated.
Division	Indicates the division to which the account belongs.
Batch Run Date	Displays the date when the batch is executed to generate the trial bill.
Batch Run Number	Indicates the batch run in which the trial bill is generated.

Related Topics

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For more information on...	See...
How to search for a trial bill	Searching for a Trial Bill on page 1375
How to view the details of a trial bill	Viewing the Trial Bill Details on page 1375

Searching for a Trial Bill

Prerequisites

To search for a trial bill, you should have:

- Divisions and currencies defined in the application

Procedure

To search for a trial bill:

1. Click the **Menu** link in the **Application** toolbar.
   A list appears.
2. From the **Main** menu, select **Billing Management** and then click **Trial Bill**.
   The **Trial Bill** screen appears.
3. Enter the search criteria in the **Search Trial Bill** zone.

   Note: ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.
4. Click **Search**.
   A list of trial bills that meet the search criteria appears in the **Search Results** section.

Related Topics

For more information on...	See...
Trial Bill screen	Trial Bill (Used for Searching) on page 1373
Search Trial Bill zone	Search Trial Bill on page 1373

Viewing the Trial Bill Details

Procedure

To view the details of a trial bill:

1. Search for the trial bill in the **Trial Bill** screen.
2. In the **Search Results** section, click the link in the **Trial Bill Information** column corresponding to the trial *b*ill whose details you want to view.
   The **Trial Bill** screen appears.
3. View the basic details of the trial bill in the **Trial Bill** zone.
4. View the segments of the trial bill in the **Trial Bill Segments** zone.
5. View the calc lines of a trial bill segment in the **Trial Bill Segment Calc Lines** zone.
6. View the service quantity details of a trial bill segment in the **Trial Bill Segment SQ Details** zone.
7. View the financial details of a trial bill segment in the **Trial Bill Segment Financial Details** zone.

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Related Topics

For more information on...	See...
How to search for a trial bill	Searching for a Trial Bill on page 1375
Trial Bill screen	Trial Bill (Used for Viewing) on page 1376
Trial Bill zone	Trial Bill on page 1376
Trial Bill Segments zone	Trial Bill Segments on page 1377
Trial Bill Segment Calc Lines zone	Trial Bill Segment Calc Lines on page 1379
Trial Bill Segment SQ Details zone	Trial Bill Segment SQ Details on page 1380
Trial Bill Segment Financial Details zone	Trial Bill Segment Financial Details on page 1381
How to view the segments of a trial bill	Viewing the Segments of a Trial Bill on page 1382
How to view the calc lines of a trial bill segment	Viewing the Calc Lines of a Trial Bill Segment on page 1383
How to view the service quantity details of a trial bill segment	Viewing the SQ Details of a Trial Bill Segment on page 1384
How to view the financial details of a trial bill segment	Viewing the Financial Details of a Trial Bill Segment on page 1384

Trial Bill (Used for Viewing)

The **Trial Bill** screen allows you to:

- View the details of a trial bill, such as the trial bill summary, trial bill messages, and trial bill characteristics
- View the segments of a trial bill
- View the calculation lines, service quantity details, and financial details of a trial bill segment
- View the details of the policy, plan, and membership for which a trial bill segment is created

It contains the following zones:

- Trial Bill on page 1376
- Trial Bill Segments on page 1377
- Trial Bill Segment Calc Lines on page 1379
- Trial Bill Segment SQ Details on page 1380
- Trial Bill Segment Financial Details on page 1381
- Policy Details on page 1381

Trial Bill

The **Trial Bill** zone displays the details of the trial bill. It contains the following sections:

- **Main** - This section provides basic information about the trial bill. It contains the following fields:

Field Name	Field Description
Trial Bill ID	Displays the trial bill ID.
Trial Bill Information	Displays additional information about the trial bill.
Trial Bill Description	Displays the description of the batch run in which the trial bill is generated.

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Field Name	Field Description
Account Information	Indicates the account for which the trial bill is generated. In addition, a context menu appears corresponding to this field which helps in navigating to other screens in the application.
	Note: It has a link. On clicking the link, the **Account** screen appears where you can view the details of the respective account.

- **Trial Bill Summary** - This section summarizes the financial impact of the bill. It contains the following fields:

Field Name	Field Description
New Charges	Displays the total amount of frozen bill segment financial transactions which are linked to the trial bill.
Adjustments	Displays the total amount of frozen and/or canceled adjustment financial transactions which are linked to the trial bill.
Corrections	Displays the total amount of canceled and/or rebilled bill segment financial transactions which are linked to the trial bill.
Total	Displays the sum of new charges, adjustments, and corrections.
No. of Bill Segments in Error	Indicates the number of bill segments in the trial bill which are in the **Error** status.

- **Trial Bill Messages** - This section lists the bill messages that are stamped on the trial bill. It contains the following columns:

Column Name	Column Description
Message Code	Displays the code that uniquely identifies the bill message.
Message on Bill	Displays the bill message.
Priority	Indicates the priority which determines the order in which the bill message must be printed on the trial bill.
Insert Code	Indicates whether the bill message must be sent separately along with the trial bill.

- **Characteristics** - This section lists characteristics of the trial bill. It contains the following columns:

Column Name	Column Description
Characteristic Type	Indicates the characteristic type.
Characteristic Value	Displays the value of the characteristic type.

In addition, this zone contains a button named **Display Trial Bill** which allows you to print a trial bill in the PDF format.

Related Topics

For more information on...	See...
How to print a trial bill in the PDF format	Printing a Trial Bill in the PDF Format on page 1382

Trial Bill Segments

The **Trial Bill Segments** zone lists the segments of the trial bill. You can filter the trial bill segments using various search criteria. This zone contains the following two sections:

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- **Search Criteria** - The **Search Criteria** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Account ID	Used to search trial bill segments which are generated for a particular usage account. **Note:** The **Search** (🔍) icon appears corresponding to this field. On clicking the **Search** icon, the **Account Search** window appears.	No
Contract Type	Used to search trial bill segments which are generated against a particular type of contract. **Note:** The **Search** (🔍) icon appears corresponding to this field. On clicking the **Search** icon, the **Contract Type Search** window appears.	No
Trial Bill Segment Type	Used to search for a particular type of trial bill segments. The valid values are: • Post Processing • Regular	No
Price Item	Used to search trial bill segments which are generated for a particular price item. **Note:** The **Search** (🔍) icon appears corresponding to this field. On clicking the **Search** icon, the **Price Item Search** window appears.	No
Trial Bill Segment Status	Used to search trial bill segments in a particular status. The valid values are: • Error • Freezable	No

- **Search Results** - On clicking the **Search** button, the search results are filtered based on the specified search criteria. The **Search Results** section contains the following columns:

Column Name	Column Description
Trial Bill Segment ID	Displays the trial bill segment ID.
Status	Indicates the status of the trial bill segment. The valid values are: • Error • Freezable
Start Date	Displays the start date of the trial bill segment.
End Date	Displays the end date of the trial bill segment.
Calculated Amount (Pricing Currency)	Displays the trial bill segment amount in the pricing currency.
Price Item	Indicates the price item for which the trial bill segment is generated.
Pricing Parameters	Indicates the price item parameters which are used along with the price item for determining the price item pricing.

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Column Name	Column Description
Rate Schedule	Indicates the rate schedule which is used for defining the price item pricing.
Price Assignment ID	Indicates the price item pricing which is used during calculation.
Billable Charge ID	Indicates the billable charge for which the trial bill segment is generated. **Note:** It has a link. On clicking the link, the **Billable Charge** screen appears where you can view the details of the respective billable charge.
Construct ID	Indicates the construct through which the trial bill segment is generated. **Note:** It has a link. On clicking the link, the **Construct** screen appears where you can view the details of the respective construct.

On clicking the **Broadcast** ( ) icon corresponding to the trial bill segment, the **Trial Bill Segment Calc Lines**, **Trial Bill Segment SQ Details**, **Trial Bill Segment Financial Details**, and **Policy Details** zones appear with the details of the respective trial bill segment.

Related Topics

For more information on...	See...
How to view the segments of a trial bill	Viewing the Segments of a Trial Bill on page 1382
Trial Bill Segment Calc Lines zone	Trial Bill Segment Calc Lines on page 1379
Trial Bill Segment SQ Details zone	Trial Bill Segment SQ Details on page 1380
Trial Bill Segment Financial Details zone	Trial Bill Segment Financial Details on page 1381
Policy Details zone	Policy Details on page 1381

Trial Bill Segment Calc Lines

The **Trial Bill Segment Calc Lines** zone lists the calculation lines which indicate how the system calculated the trial bill segment amount. It contains the following columns:

Column Name	Column Description
Sequence No.	Indicates the sequence in which the calculation line is created while calculating the trial bill segment amount.
Description on Bill	Displays the summarized information about the calculation line that will be printed on the trial bill.
Calculated Amount (Pricing Currency)	Displays the calculated charge amount associated with the calculation line in the pricing currency.
Calculated Amount (Invoice Currency)	Displays the calculated charge amount associated with the calculation line in the invoice currency.
Print	Indicates whether information about the calculation line will be printed on the person' trial bill. The valid values are:

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Column Name	Column Description
	• Yes • No
Appears in Summary	Indicates whether the calculation line amount will appear in the summary of the trial bill. The valid values are: • Yes • No
Exchange Rate	Indicates the exchange rate which is used when the invoice currency is different from the pricing currency.
Price Component ID	Indicates the price component which is used during calculation.
Service Quantity Identifier	Indicates the service quantity identifier (SQI) of the service quantity which is priced on the calculation line.
Billable Service Quantity	Displays the SQI value used by the rates engine for calculation.
Base Amount	Displays the total amount derived from the cross-referenced lines that the current line then used to calculate the charge amount.
Rate Component Sequence	Indicates the sequence of the rate component on the effective rate version which is used while calculating the line.
Exempt Amount	Displays the amount of the calculated charge that the person does not have to pay due to tax exemption.
Distribution Code	Indicates the distribution code associated with the rate component.

By default, the **Trial Bill Segment Calc Lines** zone does not appear in the **Trial Bill** screen. It appears when you click the **Broadcast** (ᯤ) icon corresponding to the trial bill segment in the **Trial Bill Segment** zone.

Related Topics

For more information on...	See...
How to view the calc lines of a trial bill segment	Viewing the Calc Lines of a Trial Bill Segment on page 1383

Trial Bill Segment SQ Details

The **Trial Bill Segment SQ Details** zone lists the service quantity identifiers associated with the contract against which the trial bill segment is created. It contains the following columns:

Column Name	Column Description
SQI	Indicates the service quantity identifier.
Billable Service Quantity	Displays the SQI value used by the rates engine for calculation.

By default, the **Trial Bill Segment SQ Details** zone does not appear in the **Trial Bill** screen. It appears when you click the **Broadcast** (ᯤ) icon corresponding to the trial bill segment in the **Trial Bill Segment** zone.

Related Topics

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For more information on...	See...
How to view the service quantity details of a trial bill segment	Viewing the SQ Details of a Trial Bill Segment on page 1384

Trial Bill Segment Financial Details

The **Trial Bill Segment Financial Details** zone lists the distribution codes which indicate the GL accounts that will be affected by the trial bill segment financial transaction. It contains the following columns:

Column Name	Column Description
Sequence No.	Indicates the sequence in which the distribution code will be considered for deriving the GL account.
Distribution Code	Indicates the distribution code associated with the rate component used for calculating the trial bill segment amount.
Amount	Displays the amount that will be debited or credited to the GL account.

By default, the **Trial Bill Segment Financial Details** zone does not appear in the **Trial Bill** screen. It appears when you click the **Broadcast** (ᯤ) icon corresponding to the trial bill segment in the **Trial Bill Segment** zone.

Related Topics

For more information on...	See...
How to view the financial details of a trial bill segment	Viewing the Financial Details of a Trial Bill Segment on page 1384

Policy Details

The **Policy Details** zone lists the policy, plan, and membership for which the trial bill segment is created. It contains the following columns:

Column Name	Column Description
Policy Information	Displays the information about the policy.
	Note: It has a link. On clicking the link, the **Policy** screen appears where you can view the details of the respective policy.
External Membership ID	Indicates the membership in which the member is included.
Member's Primary Identifier	Displays the concatenated string consisting of primary identifier type and primary identifier of the member which are separated by a colon (:).
Member Name	Indicates the member for whom the trial bill segment is generated.
Plan Information	Displays information about the policy plan.
	Note: It has a link. On clicking the link, the **Policy Plan** screen appears where you can view the details of the respective policy plan.

By default, the **Policy Details** zone does not appear in the **Trial Bill** screen. It appears when you click the **Broadcast** (ᯤ) icon corresponding to the trial bill segment in the **Trial Bill Segment** zone.

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Related Topics

For more information on...	See...
How to view the policy details of a trial bill segment	Viewing the Policy Details of a Trial Bill Segment on page 1385

Printing a Trial Bill in the PDF Format

Prerequisites

To print a trial bill in the PDF format, you should have:

- Oracle Documaker integrated with Oracle Revenue Management and Billing

Procedure

To print a trial bill in the PDF format:

1. Search for the trial bill in the **Trial Bill** screen.
2. In the **Search Results** section, click the link in the **Trial Bill Information** column corresponding to the trial *b*ill that you want to print in the PDF format.
   The **Trial Bill** screen appears.
3. Click the **Display Trial Bill** button in the **Trial Bill** zone.
   The trial bill is printed in the PDF format.

Related Topics

For more information on...	See...
How to search for a trial bill	Searching for a Trial Bill on page 1375
Trial Bill screen	Trial Bill (Used for Viewing) on page 1376
Trial Bill zone	Trial Bill on page 1376

Viewing the Segments of a Trial Bill

Procedure

To view the segments of a trial bill:

1. Search for the trial bill in the **Trial Bill** screen.
2. In the **Search Results** section, click the link in the **Trial Bill Information** column corresponding to the trial *b*ill whose details you want to view.
   The **Trial Bill** screen appears.
3. View the segments of the trial bill in the **Trial Bill Segments** zone.
4. If required, you can filter the trial bill segments using various search criteria.

Related Topics

For more information on...	See...
How to search for a trial bill	Searching for a Trial Bill on page 1375
Trial Bill screen	Trial Bill (Used for Viewing) on page 1376

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For more information on...	See...
Trial Bill Segments zone	Trial Bill Segments on page 1377
How to filter the trial bill segments	Filtering the Trial Bill Segments on page 1383

Filtering the Trial Bill Segments

Prerequisites

To filter the trial bill segments, you should have:

- Usage accounts, contract types, and price items defined in the application

Procedure

To filter the trial bill segments:

1. Search for the trial bill in the **Trial Bill** screen.
2. In the **Search Results** section, click the link in the **Trial Bill Information** column corresponding to the trial *b*ill whose details you want to view.
   The **Trial Bill** screen appears.
3. Enter the search criteria in the **Trial Bill Segments** zone.

   Note: ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.
4. Click **Search**.
   The search results are filtered based on the specified criteria.

Related Topics

For more information on...	See...
How to search for a trial bill	Searching for a Trial Bill on page 1375
Trial Bill screen	Trial Bill (Used for Viewing) on page 1376
Trial Bill Segments zone	Trial Bill Segments on page 1377

Viewing the Calc Lines of a Trial Bill Segment

Procedure

To view the calc lines of a trial bill segment:

1. Search for the trial bill in the **Trial Bill** screen.
2. In the **Search Results** section, click the link in the **Trial Bill Information** column corresponding to the trial *b*ill whose details you want to view.
   The **Trial Bill** screen appears.
3. If required, you can filter the trial bill segments in the **Trial Bill Segments** zone.
4. In the **Search Results** section, click the **Broadcast** (📡) icon corresponding to the trial bill segment whose *d*etails you want to view.

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The **Trial Bill Segment Calc Lines**, **Trial Bill Segment SQ Details**, and **Trial Bill Segment Financial Details** zones appear.

5. View the calc lines of the trial bill segment in the **Trial Bill Segment Calc Lines** zone.

Related Topics

For more information on...	See...
How to search for a trial bill	Searching for a Trial Bill on page 1375
Trial Bill screen	Trial Bill (Used for Viewing) on page 1376
How to filter the trial bill segments	Filtering the Trial Bill Segments on page 1383
Trial Bill Segment Calc Lines zone	Trial Bill Segment Calc Lines on page 1379

Viewing the SQ Details of a Trial Bill Segment

Procedure

To view the service quantity details of a trial bill segment:

1. Search for the trial bill in the **Trial Bill** screen.
2. In the **Search Results** section, click the link in the **Trial Bill Information** column corresponding to the trial *b*ill whose details you want to view.
   The **Trial Bill** screen appears.
3. If required, you can filter the trial bill segments in the **Trial Bill Segments** zone.
4. In the **Search Results** section, click the **Broadcast** (📡) icon corresponding to the trial bill segment whose *d*etails you want to view.
   The **Trial Bill Segment Calc Lines**, **Trial Bill Segment SQ Details**, and **Trial Bill Segment Financial Details** zones appear.
5. View the service quantity details of the trial bill segment in the **Trial Bill Segment SQ Details** zone.

Related Topics

For more information on...	See...
How to search for a trial bill	Searching for a Trial Bill on page 1375
Trial Bill screen	Trial Bill (Used for Viewing) on page 1376
How to filter the trial bill segments	Filtering the Trial Bill Segments on page 1383
Trial Bill Segment SQ Details zone	Trial Bill Segment SQ Details on page 1380

Viewing the Financial Details of a Trial Bill Segment

Procedure

To view the financial details of a trial bill segment:

1. Search for the trial bill in the **Trial Bill** screen.
2. In the **Search Results** section, click the link in the **Trial Bill Information** column corresponding to the trial *b*ill whose details you want to view.
   The **Trial Bill** screen appears.

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3. If required, you can filter the trial bill segments in the **Trial Bill Segments** zone.
4. In the **Search Results** section, click the **Broadcast** (ᯤ) icon corresponding to the trial bill segment whose *d*etails you want to view.
   The **Trial Bill Segment Calc Lines**, **Trial Bill Segment SQ Details**, and **Trial Bill Segment Financial Details** zones appear.
5. View the financial details of the trial bill segment in the **Trial Bill Segment Financial Details** zone.

Related Topics

For more information on...	See...
How to search for a trial bill	Searching for a Trial Bill on page 1375
Trial Bill screen	Trial Bill (Used for Viewing) on page 1376
How to filter the trial bill segments	Filtering the Trial Bill Segments on page 1383
Trial Bill Segment Financial Details zone	Trial Bill Segment Financial Details on page 1381

Viewing the Policy Details of a Trial Bill Segment

Procedure

To view the policy details of a trial bill:

1. Search for the trial bill in the **Trial Bill** screen.
2. In the **Search Results** section, click the link in the **Trial Bill Information** column corresponding to the trial *b*ill whose details you want to view.
   The **Trial Bill** screen appears.
3. If required, you can filter the trial bill segments in the **Trial Bill Segments** zone.
4. In the **Trial Bill Segments** zone, click the **Broadcast** (ᯤ) icon corresponding to the trial bill segment *w*hose policy details you want to view.
   The **Trial Bill Segment Calc Lines**, **Trial Bill Segment SQ Details**, **Trial Bill Segment Financial Details**, and **Policy Details** zones appear.
5. View the policy details of the trial bill segment in the **Policy Details** zone.

Related Topics

For more information on...	See...
How to search for a trial bill	Searching for a Trial Bill on page 1375
Trial Bill screen	Trial Bill (Used for Viewing) on page 1376
Trial Bill Segments zone	Trial Bill Segments on page 1377
How to filter the trial bill segments	Filtering the Trial Bill Segments on page 1383
Trial Bill Calc Lines zone	Trial Bill Segment Calc Lines on page 1379
Trial Bill SQ Details zone	Trial Bill Segment SQ Details on page 1380
Trial Bill Segment Financial Details zone	Trial Bill Segment Financial Details on page 1381
Policy Details zone	Policy Details on page 1381

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Chapter 20

GL Account Validation

Topics:

- Static GL Account Validation
- Dynamic GL Account Validation

Oracle Revenue Management and Billing allows you to validate the GL account statically and dynamically. The static GL account validation means you can validate the GL account while creating or editing a distribution code. And, the dynamic GL account validation means you can validate the GL account while assigning it to trial and actual financial transactions through the batch process.

For more information about static GL account validation and dynamic GL account validation, refer to Static GL Account Validation on page 1388 and Dynamic GL Account Validation on page 1388, respectively.

Static GL Account Validation

If you want to validate the GL account while creating or editing a distribution code, you need to select the **Validate GL Account** check box in the **Distribution Code** screen. If the GL account is valid, the following string appears below the check box while saving the distribution code:

"GL Account is validated on YYYY-MM-DD"

And, if the GL account is invalid, the following string appears below the check box while saving the distribution code:

"GL Account is invalid"

If you want to enable the static GL account validation feature on the **Distribution Code** screen, you need to define an algorithm of the **C1-GLVAL** or **C1-GLVAL-COB** algorithm type and attach the algorithm to the **GL Account Validation** system event in the **Algorithms** tab of the **Installation Options - Framework** screen. Both these algorithm types have one parameter named **GL Account Length**. You need to set the value of this parameter while creating the algorithm using the **C1-GLVAL** or **C1-GLVAL-COB** algorithm type. If you attach an algorithm of the **C1-GLVAL** algorithm type, the system checks whether the length of GL account is greater than or equal to the value defined in the **GL Account Length** parameter. If the length is greater than or equal to the specified length, the GL account is considered as valid. And, if the length is less than the specified length, the GL account is considered as invalid.

And, if you attach an algorithm of the **C1-GLVAL-COB** algorithm type, the system checks whether the length of GL account is equal to the value defined in the **GL Account Length** parameter. If the length is equal to the specified length, the GL account is considered as valid. And, if the length is less than or greater than the specified length, the GL account is considered as invalid.

Dynamic GL Account Validation

If you want to validate GL account while assigning it to trial and actual financial transactions, you need to set the **Validate GL Account** parameter to **Y** while executing the batch. If the GL account is valid, the date when the GL account is validated is added in the GLA_VAL_DT column of the CI_TRL_FT_GL or CI_FT_GL table, respectively, depending on whether the GL account is assigned to a trial or actual financial transaction.

If you want to enable the dynamic GL account validation feature in the C1-GLASN or GLASSGN2 batch, you need to define an algorithm of the **C1-GLVAL** or **C1-GLVAL-COB** algorithm type and attach the algorithm to either of the following:

- The **GL Account Validation** algorithm entity in the **Algorithms** tab of the **Division** screen
- The **GL Account Validation** system event in the **Algorithms** tab of the **Installation Options - Framework** screen

If the GL account validation algorithm is defined at both these algorithm spots, the algorithm defined at the division level always takes precedence over the algorithm defined in the installation options during dynamic GL account validation.

Chapter 21

Mass Adjustment Creation via CSV

Topics:

- Adjustment Upload Request (Without Approval) Status Transition
- Adjustment Upload Request (With Approval) Status Transition
- Mass Adjustment Creation
- Upload Request Type
- Adjustment Upload Request (Used for Searching)
- Adjustment Upload Request (Used for Viewing)

Until now, the system enabled you to upload adjustment data received from an external source system and create adjustments using the **C1-ADUP1** and **C1-ADUP2** batches. However, there was no user interface available through which you can upload an adjustment data file and create adjustments from the adjustment records. Now, the system provides a user interface which helps you to upload an adjustment data file.

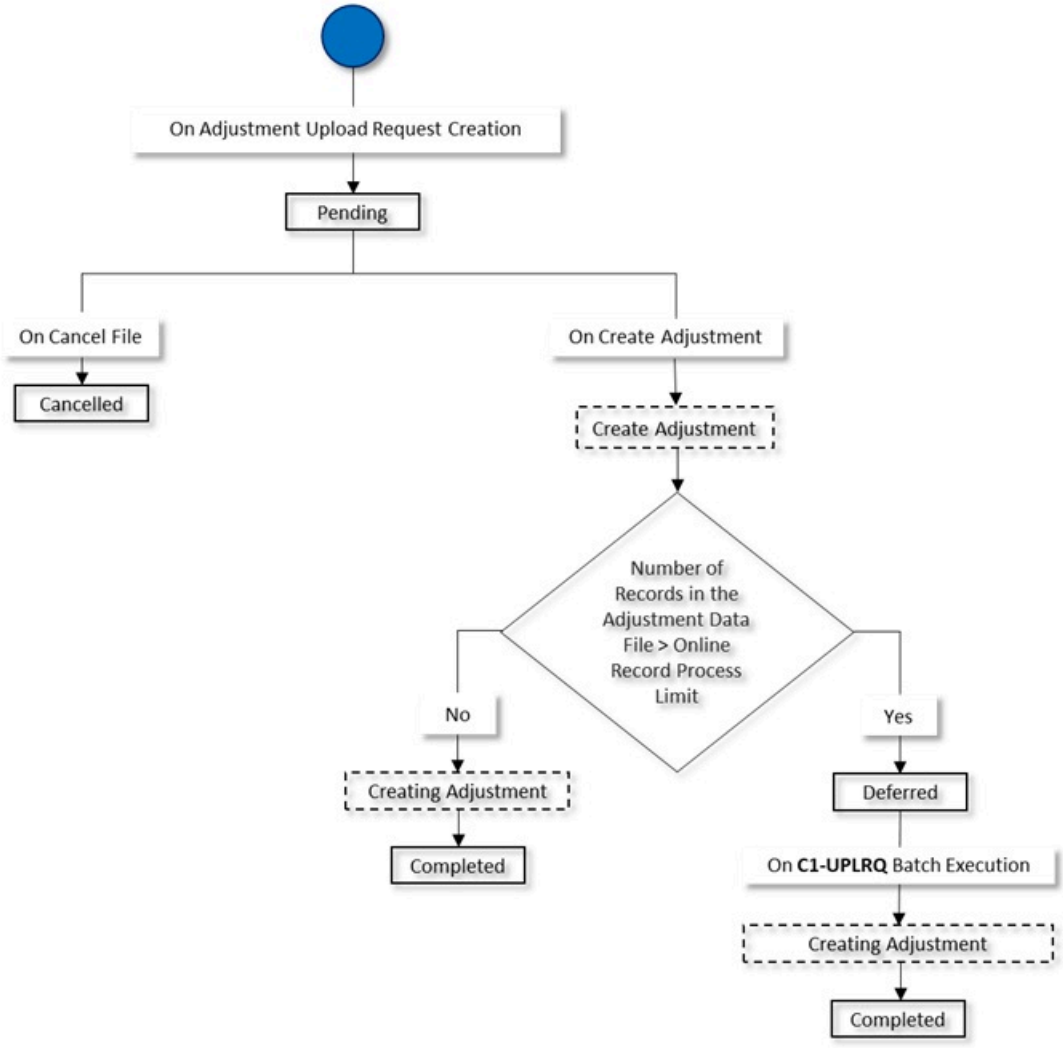
You can upload an adjustment data file in the CSV format. You need to ensure that the CSV file is in the required format; otherwise, the file will not be uploaded in the system. At present, the system supports only the CSV file format. For more information about the CSV file format, see Mass Adjustment Creation CSV Format on page 1395.

While uploading an adjustment data file, you need to specify an upload request type which is created using the **C1-AdjRequestType** business object. All the records are validated before uploading an adjustment data file. During the validation process, the system and custom validations (if any) are executed. If there is any invalid record, the system does not allow you to upload the adjustment data file. The system indicates the reason why the adjustment record could not pass through the validation process. You need to first correct the adjustment record in the CSV file and then upload the adjustment data file.

An adjustment upload request is created when an adjustment data file is successfully validated in the system. You can track an adjustment data file through an adjustment upload request. An adjustment upload request goes through various statuses in its lifecycle. Note that the lifecycle of an adjustment upload request is driven by the business object using which the adjustment upload request is created. An adjustment upload request business object named **C1-ADJUPLD** is shipped with the product. The mass adjustment creation via CSV feature explained in this document is articulated based on the lifecycle and logic defined in the **C1-ADJUPLD** business object.

Adjustment Upload Request (Without Approval) Status Transition

The following figure graphically indicates how an adjustment upload request moves from one status to another when the approval process is not configured in the upload request type:



Adjustment Upload Request (With Approval) Status Transition

The following figure graphically indicates how an adjustment upload request moves from one status to another when the approval process is configured in the upload request type:

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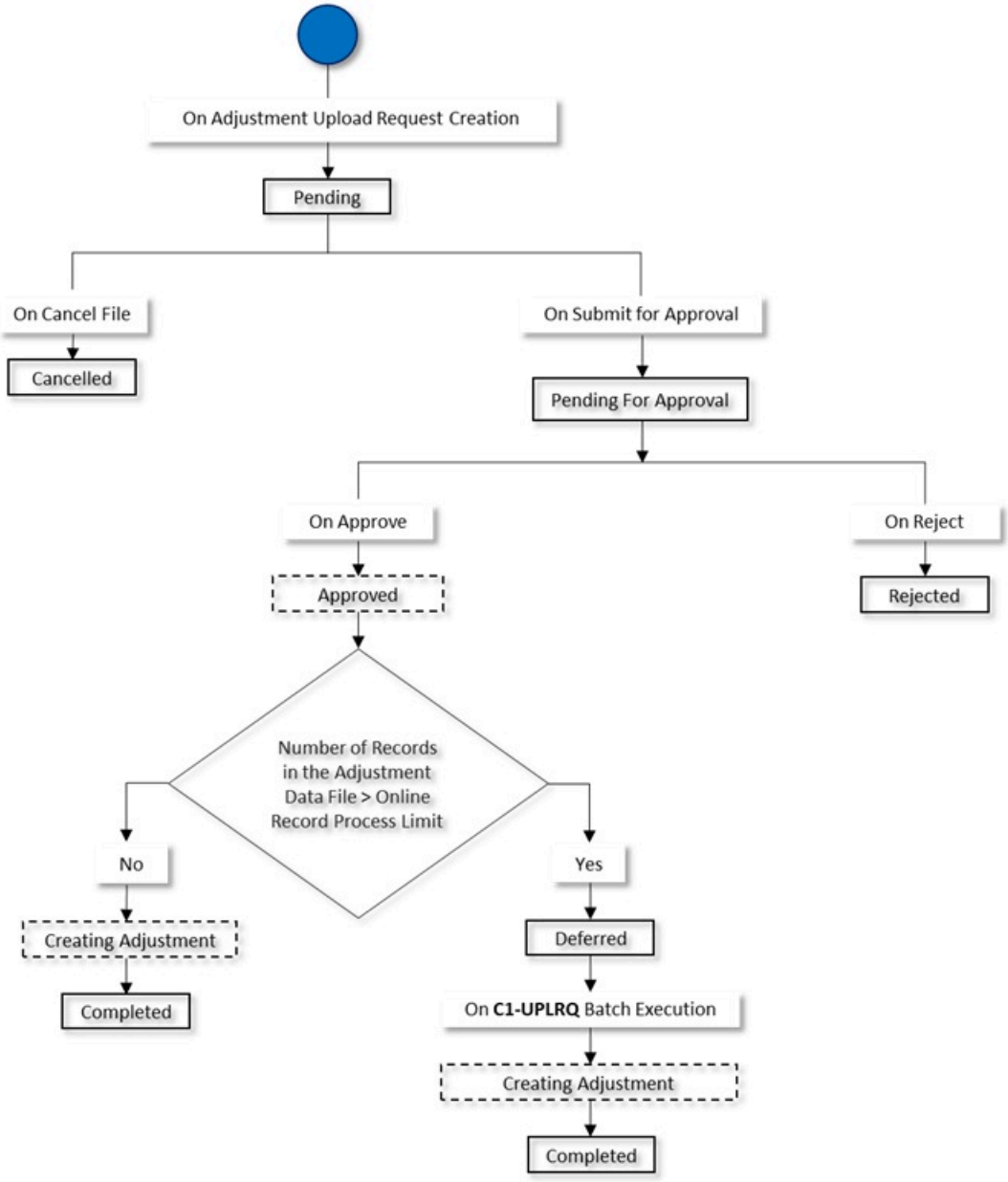

Mass Adjustment Creation

Oracle Revenue Management and Billing provides the ability to create multiple adjustments at once through the **Upload Request** feature. The system allows you to create an adjustment for each adjustment data record through an adjustment upload request. The **C1-ADJUPLD** business object enables you to create an upload request for mass adjustment creation.

Note: At present, you can only create new adjustments and not update existing adjustments through the **Upload Request** feature.

You need to create an adjustment upload request type using the **C1-AdjRequestType** business object where the upload request business object is set to **C1-ADJUPLD**. You can then upload a mass adjustment creation file in the CSV format using the respective adjustment upload request type. The mass adjustment creation file should contain records with the following information – account details, match type, match value, adjustment type, adjustment amount, adjustment

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currency, comments, bill ID, arrears date, and characteristics. For more information, see Mass Adjustment Creation CSV Format on page 1395.

Note: You can specify maximum 5 characteristics in the adjustment data record.

On uploading a mass adjustment creation file, the system validates each adjustment data record in the CSV file. The system validates the following for each record:

- Either the contract ID or account details and contract type are specified in the record.
- Either the account ID or account identifier type and account identifier is specified in the record.
- The match type, match value, adjustment type, adjustment amount, and currency are specified in the record.
- The account ID given in the record is valid.
- An account with the given account identifier type and account identifier combination exists in the system.
- The adjustment type, currency code, and match type given in the record are valid.
- The characteristic type given in the record is valid and its characteristic entity is set to **Adjustment** and is associated with the adjustment type.
- The adhoc characteristic values are validated as per the validations defined in the respective algorithm.
- The predefined characteristic value is already defined for the characteristic type.
- The foreign key reference characteristic value is valid.
- The bill ID given in the record is valid.
- The contract type or contract ID given in the record is valid.
- The contract is not in the **Canceled** status.
- An active contract of the specified contract type exists for the account.
- The amount matches the decimal positions of the respective currency.
- The adjustment type is included in the adjustment type profile which is associated with the contract type.

If the account ID is not specified in the record, the system derives the account ID using the respective account identifier type and account identifier combination. If the system could not derive the account ID using the account identifier type and account identifier combination or if any of the above validations fail, the system does not allow you to create an adjustment upload request.

Note: The system does not allow you to upload a file which exceeds the maximum file size limit (in kilobytes) specified in the respective adjustment upload request type. Therefore, you must ensure that the file size is within the maximum limit.

If all the adjustment data records are successfully validated, the system creates an adjustment upload request in the **Pending** status. You have an option to cancel an adjustment upload request if incorrect data is uploaded through the adjustment data file. If the approval process is not configured for the respective adjustment upload request type, you can click the **Create Adjustment** button to create the adjustments. The status of the adjustment upload request is then changed to **Creating Adjustment**.

However, if the approval process is configured for the respective adjustment upload request type, you can click the **Submit for Approval** button to submit the adjustment upload request for approval. The approver can either approve or reject the adjustment upload request based on the observations. On approving an adjustment upload request, the status of the adjustment upload request is changed to **Approved**. However, on rejecting an adjustment upload request, the status of the adjustment upload request is changed to **Rejected**.

Once the status of the adjustment upload request is changed to **Creating Adjustment** or **Approved**, the system checks whether the adjustment upload request must be processed in the real time (i.e., immediately) or in the deferred mode (i.e., in the background). If the number of records in the adjustment data file does not exceed the online record process limit specified in the **C1-UPLDEFEVL** algorithm (attached to the **Defer Algorithm** field in the respective adjustment upload request type), the system creates adjustments in the real time (i.e., immediately) and changes the status of the adjustment upload request to **Completed**. However, if the number of records in the adjustment data file exceeds the online record process limit, the status of the adjustment upload request is changed to **Deferred**. The system then changes the status of the adjustment upload request from **Deferred** to **Creating Adjustment** when the **C1-UPLRQ** batch is executed.

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Once the adjustments are successfully created for an adjustment upload request, the adjustment information string appears corresponding to each adjustment data record in the **Adjustment Data Records** zone.

Note: This feature is tested and certified for both the financial services and health insurance domains.

Prerequisites

To setup the mass adjustment creation via CSV feature, you need to do the following:

- Define the required upload request type using the **C1-AdjRequestType** business object where the upload request business object is set to **C1-ADJUPLD**.
- Associate the match types with the adjustment upload request types.
- Assign the **C1-ADJUP** To Do type to a To Do role whose users must receive a To Do while submitting a mass adjustment creation upload request for approval.
- Define the required characteristic types where the characteristic entity is set to **Upload Request Type**.
- Define the required characteristic types where the characteristic entity is set to **Upload Request**.
- Attach an algorithm created using the **C1-ADI-INFO** algorithm type to the **Adjustment Information** system event in the **Algorithms** tab of the **Installation Options - Framework** screen.
- Define the status reasons for the **Cancelled** and **Rejected** statuses of the **C1-ADJUPLD** business object in the **Status Reason** screen.
- Define the required account identifier types, adjustment types, and currency codes in the system.
- Add the required adjustment types in the adjustment type profile that is associated with the contract types.
- Define the required exchange rates in the system.
- Define the required characteristic types where the characteristic entity is set to **Adjustment** and associate it to the required adjustment types.
- Set the batch control type of the **Upload Request Periodic Monitor (C1-UPLRQ)** batch to **Timed** and define the following attributes:
  - Time Interval
  - Timer Active
  - User ID
  - Batch Language
  - Email Address

  For more information about this batch, see *Oracle Revenue Management and Billing Batch Guide*.

Related Topics

For more information on...	See...
How to associate a match type with an adjustment upload request type	Associating a Match Type with an Adjustment Upload Request Type on page 1413

Algorithms Used in C1-ADJUPLD

The following table lists the algorithms which are attached to the **C1-ADJUPLD** business object:

System Event	Algorithm	Algorithm Type	Description
Information	C1-FLREQ-INF	C1-FLREQ-INF	Refer to C1-FLREQ-INF on page 1394.
Validation	C1-ADVALREQ	C1-ADVALREQ	Refer to C1-ADVALREQ on page 1394.

The following table lists the algorithms which are used in the lifecycle of the **C1-ADJUPLD** business object:

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Status	System Event	Algorithm	Algorithm Type	Description
Pending	-	-	-	-
Cancelled	-	-	-	-
Create Adjustment	Enter	C1-ADJUPLDEF	C1-ADJUPLDEF	Refer to C1-ADJUPLDEF on page 1395.
Pending for Approval	Enter	C1-ADJUPAPVL	C1-ADJUPAPVL	Refer to C1-ADJUPAPVL on page 1395.
Approved	Enter	C1-ADJUPLDEF	C1-ADJUPLDEF	Refer to C1-ADJUPLDEF on page 1395.
Rejected	-	-	-	-
Deferred	Monitor	C1-ADJ-MNTR	C1-ADJ-MNTR	Refer to C1-ADJ-MNTR on page 1395.
Creating Adjustment	Enter	C1-ADJCRTION	C1-ADJCRTION	Refer to C1-ADJCRTION on page 1395.
Completed	-	-	-	-

C1-FLREQ-INF

This algorithm generates the adjustment upload request information string which appears throughout the application. It concatenates the following fields separated by a comma:

- Upload Request Type Description
- Adjustment Upload Request Status Description
- Adjustment Upload Request ID

C1-ADVALREQ

This algorithm validates the records in the adjustment data file that is uploaded using an adjustment upload request type. It validates the following:

- Either the contract ID or account details and contract type are specified in the record.
- Either the account ID or account identifier type and account identifier is specified in the record.

  Note: If the account ID is not specified in the record, it derives the account ID using the respective account identifier type and account identifier combination.
- The match type, match value, adjustment type, adjustment amount, and currency are specified in the record.
- The account ID given in the record is valid.
- An account with the given account identifier type and account identifier combination exists in the system.
- The adjustment type, currency code, and match type given in the record are valid.
- The characteristic type given in the record is valid and its characteristic entity is set to **Adjustment** and is associated with the adjustment type.
- The adhoc characteristic values are validated as per the validations defined in the respective algorithm.
- The predefined characteristic value is already defined for the characteristic type.
- The foreign key reference characteristic value is valid.
- The bill ID given in the record is valid.
- The contract type or contract ID given in the record is valid.
- The contract is not in the **Canceled** status.
- An active contract of the specified contract type exists for the account.
- The amount matches the decimal positions of the respective currency.

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- The adjustment type is included in the adjustment type profile which is associated with the contract type.

If any of above validations fail for any of the record in the CSV file, the system will not allow you to create an adjustment upload request. In other words, the system will not allow you to upload an adjustment data file.

Note: This algorithm invokes the algorithm associated to the match type in the respective adjustment upload request type. For more information, see Associating a Match Type with an Adjustment Upload Request Type on page 1413.

C1-ADJUPLDEF

This algorithm is invoked when the status of the adjustment upload request is changed to **Create Adjustment** or **Approved**. It invokes the algorithm attached to the **Defer Algorithm** field in the respective adjustment upload request type.

Note: The **C1-UPLDEFEVL** algorithm checks whether the number of records in the uploaded file exceeds the specified online record process limit. If the number of records in the uploaded file does not exceed the online record process limit, the system creates the adjustments in the real time (i.e., immediately). However, if the number of records in the uploaded file exceeds the online record process limit, the system creates the adjustments in the deferred mode. The **Deferred** mode means in the background when the **Upload Request Periodic Monitor (C1-UPLRQ)** batch is executed. You can configure the **C1-UPLRQ** batch such that it is executed at regular intervals. For more information about the batch, see *Oracle Revenue Management and Billing Batch Guide*.

C1-ADJUPAPVL

This algorithm is invoked when the status of the adjustment upload request is changed to **Pending For Approval**. It creates a To Do using the approval To Do type that is specified in the respective adjustment upload request type. Once a To Do is created, it is assigned to all the users with the approval To Do role that is specified in the respective adjustment upload request type. In addition, it creates a log entry for the adjustment upload request when the To Do is created for the approver.

C1-ADJ-MNTR

This algorithm is invoked when the **Upload Request Periodic Monitor (C1-UPLRQ)** batch is executed. It transitions the status of the adjustment upload request from **Deferred** to **Creating Adjustment**.

C1-ADJCRTION

This algorithm is invoked when the status of the adjustment upload request is changed to **Creating Adjustment**. It creates the adjustment for each record in the adjustment data file.

Note: If the specified adjustment currency is different from the account's invoice currency, the system does the currency conversion and creates the adjustment in the account's invoice currency.

Mass Adjustment Creation CSV Format

The following table lists and describes the columns that should be available in the CSV file while creating multiple adjustments at once through an upload request:

Sr. No.	Column Name	Description	Mandatory (Yes or No)
1	Account Identifier Type	Used to specify the account identifier type. **Note:** You must specify an account identifier type which is already defined in the system.	Yes (Conditional) **Note:** This data is required when the match type is set to **CNTY** and account ID is not specified in the record.

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Sr. No.	Column Name	Description	Mandatory (Yes or No)
2	Account Identifier	Used to specify the account identifier. **Note:** The system derives the account using the given account identifier type and account identifier combination when the account ID is not specified in the record.	Yes (Conditional) **Note:** This data is required when the match type is set to **CNTY** and account ID is not specified in the record.
3	Account ID	Used to indicate the account for which you want to create the adjustment.	Yes (Conditional) **Note:** This data is required when the match type is set to **CNTY** and the account identifier type and account identifier are not specified in the record.
4	Match Type	Used to indicate the match type using which you want to identify the contract against which the adjustment should be created. The valid values are: • **CNTY** - Used when you want to derive an active contract which is created using the specified contract type on the account. The system then adjusts the contract value of the account through the adjustment. **Note:** If there are multiple active contracts of the specified contract type on the account, the system will derive the contract with the latest start date. • **CONT** - Used when you want to specify the contract whose value should be adjusted through the adjustment. **Note:** You must specify a value from the **ADJ_MATCH_TYPE** lookup field.	Yes
5	Match Value	If the match type is set to **CNTY**, this column is used to specify the contract type. However, if the match type is set to **CONT**, this column is used to specify the contract ID.	Yes

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Sr. No.	Column Name	Description	Mandatory (Yes or No)
		Note: You must specify a contract type or contract which is already defined in the system. You cannot specify multiple values separated by delimiter for a match type.	
6	Adjustment Type	Used to indicate the adjustment type using which you want to create the adjustment. **Note:** You must specify an adjustment type which is already defined in the system. You must ensure that the adjustment type is included in the adjustment type profile which is associated with the contract type.	Yes
7	Adjustment Amount	Used to specify the adjustment amount. **Note:** The adjustment amount's precision must match the precision (decimal positions) defined for the currency.	Yes
8	Currency Code	Used to indicate the currency in which you want to create the adjustment. **Note:** You must specify a currency which is already defined in the system. If the specified currency is different from the account's invoice currency, the system does the currency conversion and creates the adjustment in the account's invoice currency.	Yes
9	Comments	Used to specify additional information about the adjustment.	No
10	Bill ID	Used to indicate the completed bill against which you want to create the adjustment.	No

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Sr. No.	Column Name	Description	Mandatory (Yes or No)
		Note: You must specify a bill which already exists in the system. The bill and contract should belong to the same account. The system allows you to create an adjustment against a bill when the **Print by Default** option is selected in the adjustment type.	
11	Arrears Date	Used to specify the date from when the adjustment's financial transaction should start aging. **Note:** You must specify the date in the **YYYY-MM-DD** format. If you do not specify the date, by default, it is set to the date when the adjustment's financial transaction is created.	No
12	Char Type 1, Char Type 2, ..., Char Type 5	Used to indicate the characteristic type. **Note:** You must specify a characteristic type where the characteristic entity is set to **Adjustment** and which is associated with the adjustment type. You can specify maximum 5 characteristics in the record.	No
13	Char Value 1, Char Value 2, ..., Char Value 5	Used to specify the value for the characteristic type.	Yes (Conditional) **Note:** This data is required when the characteristic type is specified in the record.

Note: The CSV file should contain the columns in the above mentioned sequence. You can add five sets of characteristics — each set containing Char Type and Char Value followed by the subsequent set (i.e., Char Type 1, Char Value 1, Char Type 2, Char Value 2, Char Type 3, Char Value 3, Char Type 4, Char Value 4, Char Type 5, Char Value 5).

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Sample Mass Adjustment Creation CSV File

```
Account Identifier Type,Account Identifier,Account ID,Match Type,Match Value,Adjustment Type,Adjustment Amount,Currency Code,C
Date,Char Type 1,Char Value 1,Char Type 2,Char Value 2,Char Type 3,Char Value 3,Char Type 4,Char Value 4,Char Type 5,Char Valu
,,0586096368,CONT,0586096896,ADJ BILL,100,USD,,,2025-06-21,,,,,,,,,
ACCT_NM,J1J1J1J1J2,,CNTY,CM_BK,ADJ BILL,50,USD,,,2025-06-22,,,,,,,,,
```

Upload Request Type

Oracle Revenue Management and Billing allows you to define an upload request type using which you can upload a CSV file and thereby create an upload request. Note that you can upload a single CSV file at a time. The system provides the following two business objects to create distinct upload request types:

- **Adjustment Upload Request Type (i.e., C1-AdjRequestType)** - Enables you to maintain an adjustment upload request type. While creating an upload request type using the **C1-AdjRequestType** business object, you need to specify the **Adjustment Upload Request (i.e., C1-ADJUPLD)** business object. It enables you to create an adjustment upload request through which you can create adjustments against the contracts.
- **Upload Request Type (i.e., C1-UplRequestType)** - Enables you to maintain an upload request type. While creating an upload request type using the **C1-UplRequestType** business object, you can specify either of the following business object to create the respective upload request:
  - **Bill Cycle Update Upload (i.e., C1-BillCycleUpdateUplReq)** - Enables you to maintain an accounts' bill cycle update upload request through which you can update the bill cycle of the accounts.
  - **Bill Group Derivation & Pricing Parameter (i.e., C1-BillLevelUploadRequest)** - Enables you to maintain a bill group derivation and pricing parameters record creation upload request through which you can define the derivation and pricing parameters for the bill groups.
  - **Bill Group Sorting Upload Request (i.e., C1-BillGrpSortUploadRequest)** - Enables you to maintain a bill group sort record creation upload request through which you can define sort ID for the bill groups.
  - **Billable Charge Upload for Fully Insured (i.e., C1-BillableChargeUploadFI)** - Enables you to maintain a billable charge creation upload request through which you can create the billable charges for the accounts. Note that this business object is only applicable for the fully insured group and individual lines of health insurance business.
  - **Contract Rider Upload (i.e., C1-ContractRiderUpdateUplReq)** - Enables you to maintain a contract rider update upload request through which you update the contract rider information of the contracts.
  - **Hold Request Upload (i.e., C1-HoldUploadRequest)** - Enables you to maintain a hold request creation upload request through which you can create a hold request for the accounts.
  - **Refund Request Upload (i.e., C1-RefundUploadRequest)** - Enables you to maintain a refund request creation upload request through which you can create a refund request for the accounts.
  - **Reinstatement Upload Request (i.e., C1-ReinstatementUploadRequest)** - Enables you to maintain a policy reinstatement upload request through which you can reinstate the fully insured group policies.
  - **Tender Cancelation Upload Request (i.e., C1-TndrCnclUploadRequest)** - Enables you to maintain a payment tender cancellation upload request through which you can cancel payment tenders.
  - **Write Off Request Upload (i.e., C1-WriteOffUploadRequest)** - Enables you to maintain a write off request creation upload request through which you can create a write off request for the accounts.
  - **Bill Cycle Rule Characteristic Upload (i.e., C1-BillCycleRuleCharUpdUplReq)** - Enables you to maintain a bill cycle rule characteristic creation or modification upload request through which you can maintain the bill cycle rule characteristic of the accounts.

It is the upload request type which helps the system to determine the following:

- Business object using which the upload request should be created in the system.
- Business object using which you want to create or update the entities through an upload request.
- Whether an adjustment upload request must be processed in the deferred mode (i.e., in the background) or in the online mode (i.e., real time).

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Note: You can configure whether the other upload requests must be validated or processed in the deferred or online mode by setting the parameter in the **C1-DEFERVALD** and **C1-DEFERUPLD** algorithm, respectively, attached to the lifecycle of the respective upload request business object.

- Whether approval is required while submitting an upload request for further processing (i.e., before creating or updating the entities in the system).
- Whether you want to display information about the entity once it is created through an upload request using the respective foreign key reference.
- Map the CSV columns with the schema of the upload request business object so that the data is stored in the respective tags.
- Configure the search filters for an upload request type using which you can filter the data records while viewing details of the respective upload request.
- Associate match types using which the system derives the contract and creates an adjustment against the respective contract.

Some of the above functions are common for the upload request types created using the **C1-AdjRequestType** and **C1-UplRequestType** business objects, whereas some are specific to the respective business object. For more information, see Defining an Upload Request Type on page 1404.

The **Upload Request Type** screen allows you to define, edit, delete, and copy an upload request type. It contains the following zones:

- Upload Request Type List on page 1400
- Upload Request Type on page 1401

The following table lists the upload request types which are shipped with the product:

Upload Request Type	Description
BILL_CYCLE_UPD_UPL_REQ_TYPE	Bill Cycle Update Upload
SA_RIDER_UPD_UPL_REQ_TYPE	Contract Rider Upload
HOLD_UPL_REQ_TYPE	Hold Request Upload
REFUND_UPL_REQ_TYPE	Refund Request Upload
WO_UPL_REQ_TYPE	Write Off Request Upload
BILL_SRT_UPL_REQ_TYPE	Bill Group Sort Upload Request Type
BILL_LVL_UPL_REQ_TYPE	Bill Group Derivation Upload Request Type
B_UPLOAD_FI	Billable Charge Upload for Fully Insured
TNDR_CNCL_UPL_REQ_TYPE	Tender Cancellation Request Upload

You can use the above shipped upload request types to create the respective upload requests or use a custom upload request type based on the requirements.

Upload Request Type List

The **Upload Request Type List** zone lists the upload request types that are already defined in the system. It contains the following columns:

Column Name	Column Description
Upload Request Type	Displays the upload request type.
Description	Displays the description of the upload request type.

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Column Name	Column Description
Edit	On clicking the **Edit** (✎) icon, the **Upload Request Type** screen appears where you can edit the details of the upload request type.
Duplicate	On clicking the **Duplicate** (⧉) icon, the **Upload Request Type** screen appears where you can define a new upload request type using an existing upload request type.
Delete	On clicking the **Delete** (🗑) icon, you can delete the upload request type. **Note:** You can delete an upload request type only when an upload request is not yet created using the upload request type.
Mapping	On clicking the **Mapping** (🔗) icon, the **Upload Request Mapping** screen appears where you can do the following: • Map the data of the CSV file to the schema of the respective upload request business object. The system will then store the data in the respective tags of the upload request business object schema. • Configure the search filters for the upload request type. The system will then display the search filters (in the specified sequence) in the **Data Records** zone of the **Upload Request** screen while viewing the details of the respective upload requests. **Note:** This column is applicable only for an upload request type which is created using the **C1-UplRequestType** business object and not for an upload request type which is created using the**C1-AdjRequestType** business object.
Status	Indicates the status of the upload request type. The valid values are: • ACTIVE • INACTIVE

On clicking the **Broadcast** (📡) icon corresponding to an upload request type, the **Upload Request Type** zone appears with the details of the respective upload request type.

Related Topics

For more information on...	See...
How to edit an upload request type	Editing an Upload Request Type on page 1416
How to copy an upload request type	Copying an Upload Request Type on page 1424
How to delete an upload request type	Deleting an Upload Request Type on page 1435
How to map data and configure search filters for an upload request type	Mapping Data and Configuring Filters for an Upload Request Type on page 1433
How to view the details of an upload request type	Viewing the Upload Request Type Details on page 1436

Upload Request Type

The **Upload Request Type** zone displays the details of the upload request type. It contains the following sections:

- **Main** - Displays the basic information about the upload request type. It contains the following fields:

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Field Name	Field Description
Upload Request Type	Displays the upload request type.
Upload Request Business Object	Indicates the business object using which an upload request should be created. **Note:** It has a link. On clicking the link, the **Business Object** screen appears where you can view the details of the respective business object.
Description	Displays the description of the upload request type.
Detailed Description	Displays additional information about the upload request type.
Status	Indicates the status of the upload request type. The valid values are: • Active • Inactive
File Size (KB)	Indicates the maximum file size limit (in kilobytes) while uploading files using the upload request type. **Note:** This field appears when the upload request type is created using the **C1-AdjRequestType** business object.
Defer Algorithm	Indicates the algorithm that will be triggered when you click the **Create Adjustment** or **Approve** button. **Note:** It has a link. On clicking the link, the **Algorithm** screen appears where you can view the details of the respective algorithm. This field appears when the upload request type is created using the **C1-AdjRequestType** business object.
Entity Business Object	Indicates the business object using which you want to create or update the entities through the respective upload request. **Note:** It has a link. On clicking the link, the **Business Object** screen appears where you can view the details of the respective business object. This field appears when the upload request type is created using the **C1-UplRequestType** business object.
Approval Required	Indicates whether approval is required while creating or updating entities through the respective upload request.
Approval To Do Type	Indicates that the To Do entry of the specified To Do type must be created when an upload request is submitted for approval. **Note:** This field appears when the **Approval Required** option is selected. It has a link. On clicking the link, the **To Do Type** screen appears where you can view the details of the respective To Do type.

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Field Name	Field Description
Approval To Do Role	Indicates that users with the specified To Do role can only approve an upload request which is submitted for approval. **Note:** This field appears when the **Approval Required** option is selected. It has a link. On clicking the link, the **To Do Role** screen appears where you can view the details of the respective To Do role.
FK Reference Code	Indicates the foreign key reference using which you want to display information about the entity once it is created through an upload request. **Note:** It has a link. On clicking the link, the **Foreign Key Reference** screen appears where you can view the details of the respective foreign key reference. This field appears when the upload request type is created using the **C1-UplRequestType** business object.

- **Adjustment Match Type** - Lists the match types using which you want to create adjustments for the respective adjustment upload requests. This section appears when the upload request type is created using the **C1-AdjRequestType** business object. It contains the following columns:

Column Name	Column Description
Match Type	Indicates the match type for which the algorithm is associated. The valid values are: • Contract • Contract Type
Algorithm	Indicates the algorithm that will be triggered to derive the contract. **Note:** It has a link. On clicking the link, the **Algorithm** screen appears where you can view the details of the respective algorithm.

- **Characteristics** - Lists the characteristics of the upload request type. It contains the following columns:

Column Name	Column Description
Characteristic Type	Indicates the characteristic type.
Characteristic Value	Displays the value of the characteristic type.

- **Record Actions** - Enables you to perform various actions on the upload request type. It contains the following buttons:

Button Name	Button Description
Edit	Used to edit the details of the upload request type.
Delete	Used to delete the upload request type. **Note:** You can delete an upload request type when an upload request is not yet created using the upload request type.
Duplicate	Used to create a new upload request type using an existing upload request type.

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- **Record Information** - This section contains the following field:

Field Name	Field Description
Business Object	Indicates the business object using which an upload request type is created.
	Note: It has a link. On clicking the link, the **Business Object** screen appears where you can view the details of the respective business object.

By default, the **Upload Request Type** zone does not appear in the **Upload Request Type** screen. It appears when you click the **Broadcast** (📡) icon corresponding to the upload request type in the **Upload Request Type List** zone.

Related Topics

For more information on...	See...
Upload Request Type screen	Upload Request Type on page 1399
Upload Request Type List zone	Upload Request Type List on page 1400
How to define an upload request type	Defining an Upload Request Type on page 1404
How to edit an upload request type	Editing an Upload Request Type on page 1416
How to copy an upload request type	Copying an Upload Request Type on page 1424
How to delete an upload request type	Deleting an Upload Request Type on page 1435
How to view the details of an upload request type	Viewing the Upload Request Type Details on page 1436

Defining an Upload Request Type

Prerequisites

To define an upload request type, you should have:

If you want to create...	Then, you should have...
An adjustment upload request type	• Upload request type business objects defined in the application • Upload request business objects defined in the application • A defer algorithm created using the **C1-UPLDEFEVL** algorithm type in the application • Required To Do role assigned to the **C1-ADJUP** To Do type in the application • An algorithm created using the **C1-MTCIALG** or **C1-MTCTALG** algorithm type in the application depending on the match type using which you want to create the adjustments
An accounts' bill cycle update upload request type	• Upload request type business objects defined in the application • Upload request business objects defined in the application • Required To Do role assigned to the **C1-BCUUR** To Do type in the application • Required entity business object (for example, C1-AccountBO) defined in the application

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If you want to create...	Then, you should have...
	• Required foreign key reference for the account (for example, C1-ACCT) defined in the application

A bill group derivation and pricing parameters record creation upload request type	• Upload request type business objects defined in the application
	• Upload request business objects defined in the application
	• An approval To Do type named **C1-BGDVP** created with the following specifications:
	  • **Navigation Option** - c1upldrqTabMenu
	  • **Sort Key** - Upload Request ID
	  • **Drill Key Table** - C1_UPLOAD_REQ
	  • **Drill Key Field** - UPLOAD_REQ_ID
	• Required To Do role assigned to the **C1-BGDVP** To Do type in the application
	• Required entity business object (for example, C1-BillLevel) defined in the application
	• Required foreign key reference for the bill group (i.e., person) defined in the system.

A bill group sort record creation upload request type	• Upload request type business objects defined in the application
	• Upload request business objects defined in the application
	• An approval To Do type named **C1-BGSRT** created with the following specifications:
	  • **Navigation Option** - c1upldrqTabMenu
	  • **Sort Key** - Upload Request ID
	  • **Drill Key Table** - C1_UPLOAD_REQ
	  • **Drill Key Field** - UPLOAD_REQ_ID
	• Required To Do role assigned to the **C1-BGSRT** To Do type in the application
	• Required entity business object (for example, C1-BillingGroupSortId) defined in the application
	• Required foreign key reference for the bill group (i.e., person) defined in the system.

A billable charge creation upload request type (for the fully insured group and individual lines of business)	• Upload request type business objects defined in the application • Upload request business objects defined in the application • Required To Do role assigned to the **C1-BCUR** To Do type in the application • Required entity business object (for example, C1-BILLCHARGE) defined in the application • Required foreign key reference for the billable charge (for example, C1-BCHIN) defined in the application
A contract rider update upload request type	• Upload request type business objects defined in the application • Upload request business objects defined in the application • Required To Do role assigned to the **C1-CRUUR** To Do type in the application • Required entity business object (for example, C1_SA) defined in the application • Required foreign key reference for the contract defined in the application

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If you want to create...	Then, you should have...
A hold request creation upload request type	• Upload request type business objects defined in the application • Upload request business objects defined in the application • Required To Do role assigned to the **C1-HLDUR** To Do type in the application • Required entity business object (for example, C1-HoldRequest) defined in the application • Required foreign key reference for the hold request (for example, C1-HLDRE) defined in the application
A refund request creation upload request type	• Upload request type business objects defined in the application • Upload request business objects defined in the application • Required To Do role assigned to the **C1-REFUR** To Do type in the application • Required entity business object (for example, C1-RefundReq) defined in the application • Required foreign key reference for the refund request (for example, C1-REFWO) defined in the application
A policy reinstatement upload request type	• Upload request type business objects defined in the application • Upload request business objects defined in the application • Required To Do role assigned to the **C1-RPUR** To Do type in the application • Required entity business object (for example, C1-POLICY) defined in the application • Required foreign key reference for the policy (for example, C1-POLCY) defined in the application
A payment tender cancellation upload request type	• Upload request type business objects defined in the application • Upload request business objects defined in the application • Required To Do role assigned to the **C1-TNDCL** To Do type in the application • Required foreign key reference for the payment event (for example, C1-PEVT) defined in the application
A write off request creation upload request type	• Upload request type business objects defined in the application • Upload request business objects defined in the application • Required To Do role assigned to the **C1-WOUR** To Do type in the application • Required entity business object (for example, C1-WORequest) defined in the application • Required foreign key reference for the write off request (for example, C1-REFWO) defined in the application
A bill cycle rule characteristic creation or modification upload request type	• Upload request type business objects defined in the application • Upload request business objects defined in the application • Required To Do role assigned to the **C1-BCRUR** To Do type in the application • Required entity business object (for example, C1-AccountBO) defined in the application

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If you want to create...	Then, you should have...
	• Required foreign key reference for the account (for example, C1-ACCT) defined in the application

Procedure

To define an upload request type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **U** and then click **Upload Request Type**.
   A sub-menu appears.
3. Click the **Add** option from the **Upload Request Type** sub-menu.

   The **Select Business Object** screen appears. It contains the following field:

Field Name	Field Description	Mandatory (Yes or No)
Upload Request Type Business Object	Used to indicate the business object using which you want to create the upload request type. The valid values are: • **Adjustment Upload Request Type (i.e., C1-AdjRequestType)** - Enables you to maintain an adjustment upload request type. • **Upload Request Type (i.e., C1-UplRequestType)** - Enables you to maintain an upload request type. **Note:** The above mentioned business objects are shipped with the product. The list includes those business objects which are created using the **Upload Request Type** (i.e., **C1-UPLREQTYP**) maintenance object.	Yes

Tip: Alternatively, you can access the **Select Business Object** screen by clicking the **Add** button in the **Page Title** area of the **Upload Request Type** screen.

Note: The **Select Business Object** screen appears when there are multiple upload request type business objects defined in the application. If there is only one upload request type business object defined in the application, the **Upload Request Type** screen appears.

4. Select the required upload request type business object from the respective field.
5. Click **OK**.

   The **Upload Request Type** screen appears. It contains the following sections:

   - **Main** - Used to specify the basic details for the upload request type.
   - **Adjustment Match Type** - Used to specify the match type using which you want to create adjustments for the respective adjustment upload requests.

     Note: This section appears when you are creating an upload request type using the **C1-AdjRequestType** business object.
   - **Characteristics** - Used to define the characteristics for the upload request type.

   The **Main** section contains the following fields:

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Field Name	Field Description	Mandatory (Yes or No)
Upload Request Type	Used to specify the upload request type.	Yes
Upload Request Type Business Object	Indicates the business object using which you are defining the upload request type.	Not applicable
Upload Request Business Object	Used to indicate the business object using which you want to create the respective upload request. If you are creating an upload request type using the **C1-AdjRequestType** business object, the valid value is: • **Adjustment Upload Request (i.e., C1-ADJUPLD)** - Enables you to maintain an adjustment upload request. However, if you are creating an upload request type using the **C1-UplRequestType** business object, the valid values are: • **Bill Cycle Update Upload (i.e., C1-BillCycleUpdateUplReq)** - Enables you to maintain an accounts' bill cycle update upload request. • **Bill Group Derivation & Pricing Parameter (i.e., C1-BillLevelUploadRequest)** - Enables you to maintain a bill group derivation and pricing parameters record creation upload request. • **Bill Group Sorting Upload Request (i.e., C1-BillGrpSortUploadRequest)** - Enables you to maintain a bill group sort record creation upload request. • **Billable Charge Upload for Fully Insured (i.e., C1-BillableChargeUploadFI)** - Enables you to maintain a billable charge creation upload request. Note that this business object is only applicable for the fully insured group and individual lines of health insurance business. • **Contract Rider Upload (i.e., C1-ContractRiderUpdateUplReq)** - Enables you to maintain a contract rider update upload request. • **Hold Request Upload (i.e., C1-HoldUploadRequest)** - Enables you to maintain a hold request creation upload request. • **Refund Request Upload (i.e., C1-RefundUploadRequest)** - Enables you to maintain a refund request creation upload request. • **Reinstatement Upload Request (i.e., C1-ReinstatementUploadRequest)** - Enables you to maintain a policy reinstatement upload request.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	• **Tender Cancelation Upload Request (i.e., C1-TndrCnclUploadRequest)** - Enables you to maintain a payment tender cancellation upload request. • **Write Off Request Upload (i.e., C1-WriteOffUploadRequest)** - Enables you to maintain a write off request creation upload request. • **Bill Cycle Rule Characteristic Upload (i.e., C1-BillCycleRuleCharUpdUplReq)** - Enables you to maintain a bill cycle rule characteristic creation or modification upload request. **Note:** The above mentioned business objects are shipped with the product. The list includes those business objects which are created using the **Upload Request (Adjustment Upload)** (i.e., **C1-UPLREQ**) or **Upload Request** (i.e., **C1-UPLOADREQ**) maintenance object depending on the business object used to create the upload request type.	
Description	Used to specify the description for the upload request type.	Yes
Detailed Description	Used to specify additional information about the upload request type. **Note:** You can resize the text box depending on your requirement by clicking the **Resize Handle** (⇲) icon at the bottom right corner of the text box.	No
Status	Used to indicate the status of the upload request type. The valid values are: • Active • Inactive	Yes
File Size (KB)	Used to indicate the maximum file size limit (in kilobytes) while uploading files using the upload request type.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	Note: You must specify a positive integer value in this field. This field appears when you are creating an upload request type using the **C1-AdjRequestType** business object. By default, the maximum file size limit is set to 700 KB in all the business objects which are created using the **Upload Request** (i.e., **C1-UPLOADREQ**) maintenance object. Therefore, you don't need to explicitly set the maximum file size limit while defining an upload request type using the **C1-UplRequestType** business object.	
Defer Algorithm	Used to attach an algorithm that will be triggered when you click the **Create Adjustment** or **Approve** button. **Note:** The **Search** (🔍) icon appears corresponding to the **Defer Algorithm** field. On clicking the **Search** icon, the **Algorithm Search** window appears. You need to attach an algorithm created using the **C1-UPLDEFEVL** algorithm type to this field. This algorithm checks whether the number of records in the uploaded file exceeds the specified online record process limit. If the number of records in the uploaded file does not exceed the online record process limit, the system creates the adjustments in the real time (i.e., immediately). However, if the number of records in the uploaded file exceeds the online record process limit, the system creates the adjustments in the deferred mode. The **Deferred** mode means in the background when the **Upload Request Periodic Monitor (C1-UPLRQ)** batch is executed. You can configure the **Upload Request Periodic Monitor (C1-UPLRQ)** batch such that it is executed at regular intervals. For more information about the batch, see *Oracle Revenue Management and Billing Batch Guide*. This field appears when you are creating an upload request type using the **C1-AdjRequestType** business object.	Yes
Entity Business Object	Used to indicate the business object using which you want to create or update the entities through the respective upload request. You must use the	No

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Field Name	Field Description	Mandatory (Yes or No)
	following entity business object for the respective upload request type: • While defining an accounts' bill cycle update upload request type, you must set the entity business object to **C1-AccountBO**. • While defining a bill group derivation and pricing parameters record creation upload request type, you must set the entity business object to **C1-BillLevel**. • While defining a bill group sort record creation upload request type, you must set the entity business object to **C1-BillingGroupSortId**. • While defining a billable charge creation upload request type, you must set the entity business object to **C1-BILLCHARGE**. • While defining a contract rider update upload request type, you must set the entity business object to **C1_SA**. • While defining a hold request creation upload request type, you must set the entity business object to **C1-HoldRequest**. • While defining a refund request creation upload request type, you must set the entity business object to **C1-RefundReq**. • While defining a policy reinstatement upload request type, you must set the entity business object to **C1-POLICY**. • While defining a write off request creation upload request type, you must set the entity business object to **C1-WORequest**. • While defining a bill cycle rule characteristic creation or modification upload request type, you must set the entity business object to **C1-AccountBO**.	

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The **Search** (🔍) icon appears corresponding to the **Entity Business Object** field. On clicking the **Search** icon, the **Business Object Search** window appears. This field appears when you are creating an upload request type using the **C1-UplRequestType** business object. The **Upload Request** feature enables you to upload business object based entities and non business object based entities in the system. If you want to create business object based entities through the respective upload request, you need to specify the entity business object in the upload request type. However, if you want to create non business object based entities (i.e., entities created via any business service) through the respective upload request, you do not need to specify the entity business object in the upload request type. For example, while defining a payment tender cancellation upload request type, you do not need to specify the entity business object.	
Approval Required	Used to indicate whether approval is required while creating or updating entities through the respective upload request.	No
Approval To Do Type	Used to indicate that the To Do entry of the specified To Do type must be created when an upload request is submitted for approval. **Note:** The **Search** (🔍) icon appears corresponding to the **Approval To Do Type** field. On clicking the **Search** icon, the **To Do Type Search** window appears. On specifying the To Do type, the description of the To Do type appears corresponding to the **Approval To Do Type** field. This field appears when the **Approval Required** option is selected. You can use the respective To Do type mentioned in the prerequisites or a custom To Do type, if required.	Yes (Conditional) **Note:** This field is required when the **Approval Required** option is selected.
Approval To Do Role	Used to indicate that users with the specified To Do role can only approve an upload request which is submitted for approval.	Yes (Conditional)

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The list includes only those To Do roles which are associated with the approval To Do type. This field appears when the **Approval Required** option is selected.	**Note:** This field is required when the **Approval Required** option is selected.
FK Reference Code	Used to indicate the foreign key reference using which you want to display information about the entity once it is created through an upload request. **Note:** If the foreign key reference is specified in the upload request type, the system displays the entity information for the respective upload requests in the **Data Records** zone of the **Upload Request** screen once the entity is created (i.e., once the upload request is processed). However, if the foreign key reference is not specified in the upload request type, the system does not display the entity information for the respective upload requests. The **Search** (🔍) icon appears corresponding to the **FK Reference Code** field. On clicking the **Search** icon, the **Foreign Key Search** window appears. This field appears when you are creating an upload request type using the **C1-UplRequestType** business object.	No

6. Enter the required details in the **Main** section.
7. Associate a match type with the adjustment upload request type.
8. Define characteristics for the upload request type, if required.
9. Click **Save**.
   The upload request type is defined.

Related Topics

For more information on...	See...
Upload Request Type screen	Upload Request Type on page 1399
How to associate a match type with an adjustment upload request type	Associating a Match Type with an Adjustment Upload Request Type on page 1413
How to define a characteristic for an upload request type	Defining a Characteristic for an Upload Request Type on page 1415

Associating a Match Type with an Adjustment Upload Request Type

Prerequisites

To associate a match type with an adjustment upload request type, you should have:

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- Required algorithm defined for the selected match type

Note:

The following algorithms are shipped with the product for the respective match type:

Match Type	Algorithm Type	Algorithm	Algorithm Description
Contract	C1-MTCIALG	C1-MTCIALG	This algorithm derives the contract for each adjustment record where the match type is set to **CONT**.
Contract Type	C1-MTCTALG	C1-MTCTALG	This algorithm derives the contract using the contract type and account details for each adjustment record where the match type is set to **CNTY**. If there are multiple active contracts of the specified contract type on the account, the contract with the latest start date is considered.

Procedure

To associate a match type with an adjustment upload request type:

1. Ensure that the **Adjustment Match Type** section is expanded when you are defining, editing, or copying an adjustment upload *r*equest type.

   The **Adjustment Match Type** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Match Type	Used to indicate the match type for which you want to associate the algorithm. The valid values are: • Contract • Contract Type	Yes (Conditional) **Note:** This field is required when you are creating an upload request type using the **C1-AdjRequestType** business object.
Algorithm	Used to attach an algorithm that will be triggered to derive the contract. The system will then create an adjustment against the respective contract. **Note:** The **Search** (🔍) icon appears corresponding to the **Algorithm** field. On clicking the **Search** icon, the **Algorithm Search** window appears. You must specify an algorithm which is already defined in the system.	Yes (Conditional) **Note:** This field is required when you are creating an upload request type using the **C1-AdjRequestType** business object.

   Note: This section appears when an upload request type is created using the **C1-AdjRequestType** business object.

2. Enter the required details in the **Adjustment Match Type** section.
3. If you want to define more than one match type for the adjustment upload request type, click the **Add** (+) icon and then *r*epeat step 2.

   Note: However, if you want to remove a match type from the adjustment upload request type, click the **Delete** (🗑) icon corresponding to the match type.

Related Topics

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For more information on...	See...
How to define an upload request type	Defining an Upload Request Type on page 1404
How to edit an upload request type	Editing an Upload Request Type on page 1416
How to copy an upload request type	Copying an Upload Request Type on page 1424

Defining a Characteristic for an Upload Request Type

Prerequisites

To define a characteristic for an upload request type, you should have:

- Characteristic types defined in the application (where the characteristic entity is set to **Upload Request Type**)

Procedure

To define a characteristic for an upload request type:

1. Ensure that the **Characteristics** section is expanded when you are defining, editing, or copying an upload *r*equest type.

   The **Characteristics** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Characteristic Type	Used to indicate the characteristic type. **Note:** The list includes only those characteristic types where the characteristic entity is set to **Upload Request Type**.	Yes (Conditional) **Note:** This field is required when you are defining a characteristic for the upload request type.
Characteristic Value	Used to specify the value for the characteristic type. **Note:** If you select a predefined characteristic type, the **Search** (🔍) icon appears corresponding to the **Characteristic Value** field. On clicking the **Search** icon, the **Predefined Characteristic Search** window appears. On specifying the value for a predefined characteristic type, the description of the characteristic value appears corresponding to the **Characteristic Value** field.	Yes (Conditional) **Note:** This field is required when you are defining a characteristic for the upload request type.

2. Enter the required details in the **Characteristics** section.
3. If you want to define more than one characteristic for the upload request type, click the **Add** (+) icon and then *r*epeat step 2.

> **Note:** However, if you want to remove a characteristic from the upload request type, click the **Delete** (🗑) icon corresponding to the characteristic.

Related Topics

For more information on...	See...
How to define an upload request type	Defining an Upload Request Type on page 1404

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For more information on...	See...
How to edit an upload request type	Editing an Upload Request Type on page 1416
How to copy an upload request type	Copying an Upload Request Type on page 1424

Editing an Upload Request Type

Prerequisites

To edit an upload request type, you should have:

If you want to create...	Then, you should have...
An adjustment upload request type	• Upload request business objects defined in the application • A defer algorithm created using the **C1-UPLDEFEVL** algorithm type in the application • Required To Do role assigned to the **C1-ADJUP** To Do type in the application • An algorithm created using the **C1-MTCIALG** or **C1-MTCTALG** algorithm type in the application depending on the match type using which you want to create the adjustments
An accounts' bill cycle update upload request type	• Upload request business objects defined in the application • Required To Do role assigned to the **C1-BCUUR** To Do type in the application • Required entity business object (for example, C1-AccountBO) defined in the application • Required foreign key reference for the account (for example, C1-ACCT) defined in the application

A bill group derivation and pricing parameters record creation upload request type	• Upload request business objects defined in the application
	• An approval To Do type named **C1-BGDVP** created with the following specifications:
	  • **Navigation Option** - c1upldrqTabMenu
	  • **Sort Key** - Upload Request ID
	  • **Drill Key Table** - C1_UPLOAD_REQ
	  • **Drill Key Field** - UPLOAD_REQ_ID
	• Required To Do role assigned to the **C1-BGDVP** To Do type in the application
	• Required entity business object (for example, C1-BillLevel) defined in the application
	• Required foreign key reference for the bill group (i.e., person) defined in the system.

A bill group sort record creation upload request type	• Upload request business objects defined in the application
	• An approval To Do type named **C1-BGSRT** created with the following specifications:
	  • **Navigation Option** - c1upldrqTabMenu
	  • **Sort Key** - Upload Request ID
	  • **Drill Key Table** - C1_UPLOAD_REQ
	  • **Drill Key Field** - UPLOAD_REQ_ID

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If you want to create...	Then, you should have...
	• Required To Do role assigned to the **C1-BGSRT** To Do type in the application • Required entity business object (for example, C1-BillingGroupSortId) defined in the application • Required foreign key reference for the bill group (i.e., person) defined in the system.
A billable charge creation upload request type (for the fully insured group and individual lines of business)	• Upload request business objects defined in the application • Required To Do role assigned to the **C1-BCUR** To Do type in the application • Required entity business object (for example, C1-BILLCHARGE) defined in the application • Required foreign key reference for the billable charge (for example, C1-BCHIN) defined in the application
A contract rider update upload request type	• Upload request business objects defined in the application • Required To Do role assigned to the **C1-CRUUR** To Do type in the application • Required entity business object (for example, C1_SA) defined in the application • Required foreign key reference for the contract defined in the application
A hold request creation upload request type	• Upload request business objects defined in the application • Required To Do role assigned to the **C1-HLDUR** To Do type in the application • Required entity business object (for example, C1-HoldRequest) defined in the application • Required foreign key reference for the hold request (for example, C1-HLDRE) defined in the application
A refund request creation upload request type	• Upload request business objects defined in the application • Required To Do role assigned to the **C1-REFUR** To Do type in the application • Required entity business object (for example, C1-RefundReq) defined in the application • Required foreign key reference for the refund request (for example, C1-REFWO) defined in the application
A policy reinstatement upload request type	• Upload request business objects defined in the application • Required To Do role assigned to the **C1-RPUR** To Do type in the application • Required entity business object (for example, C1-POLICY) defined in the application • Required foreign key reference for the policy (for example, C1-POLCY) defined in the application
A payment tender cancellation upload request type	• Upload request business objects defined in the application • Required To Do role assigned to the **C1-TNDCL** To Do type in the application • Required foreign key reference for the payment event (for example, C1-PEVT) defined in the application

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If you want to create...	Then, you should have...
A write off request creation upload request type	• Upload request business objects defined in the application • Required To Do role assigned to the **C1-WOUR** To Do type in the application • Required entity business object (for example, C1-WORequest) defined in the application • Required foreign key reference for the write off request (for example, C1-REFWO) defined in the application
A bill cycle rule characteristic creation or modification upload request type	• Upload request business objects defined in the application • Required To Do role assigned to the **C1-BCRUR** To Do type in the application • Required entity business object (for example, C1-AccountBO) defined in the application • Required foreign key reference for the account (for example, C1-ACCT) defined in the application

Procedure

To edit an upload request type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **U** and then click **Upload Request Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Upload Request Type** sub-menu.
   The **Upload Request Type** screen appears.
4. In the **Upload Request Type List** zone, click the **Edit** (✎) icon in the **Edit** column corresponding to the *u*pload request type whose details you want to edit.

   The **Upload Request Type** screen appears. It contains the following sections:

   - **Main** - Used to specify the basic details for the upload request type.
   - **Adjustment Match Type** - Used to specify the match type using which you want to create adjustments for the respective adjustment upload requests.

     Note: This section appears when you are creating an upload request type using the **C1-AdjRequestType** business object.
   - **Characteristics** - Used to define the characteristics for the upload request type.

   The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Upload Request Type	Displays the upload request type.	Not applicable
Upload Request Type Business Object	Indicates the business object which is used while defining the upload request type.	Not applicable
Upload Request Business Object	Used to indicate the business object using which you want to create the respective upload request. If you are creating an upload request type using the **C1-AdjRequestType** business object, the valid value is:	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	• **Adjustment Upload Request (i.e., C1-ADJUPLD)** - Enables you to maintain an adjustment upload request. However, if you are creating an upload request type using the **C1-UplRequestType** business object, the valid values are: • **Bill Cycle Update Upload (i.e., C1-BillCycleUpdateUplReq)** - Enables you to maintain an accounts' bill cycle update upload request. • **Bill Group Derivation & Pricing Parameter (i.e., C1-BillLevelUploadRequest)** - Enables you to maintain a bill group derivation and pricing parameters record creation upload request. • **Bill Group Sorting Upload Request (i.e., C1-BillGrpSortUploadRequest)** - Enables you to maintain a bill group sort record creation upload request. • **Billable Charge Upload for Fully Insured (i.e., C1-BillableChargeUploadFI)** - Enables you to maintain a billable charge creation upload request. Note that this business object is only applicable for the fully insured group and individual lines of health insurance business. • **Contract Rider Upload (i.e., C1-ContractRiderUpdateUplReq)** - Enables you to maintain a contract rider update upload request. • **Hold Request Upload (i.e., C1-HoldUploadRequest)** - Enables you to maintain a hold request creation upload request. • **Refund Request Upload (i.e., C1-RefundUploadRequest)** - Enables you to maintain a refund request creation upload request. • **Reinstatement Upload Request (i.e., C1-ReinstatementUploadRequest)** - Enables you to maintain a policy reinstatement upload request. • **Tender Cancelation Upload Request (i.e., C1-TndrCnclUploadRequest)** - Enables you to maintain a payment tender cancellation upload request. • **Write Off Request Upload (i.e., C1-WriteOffUploadRequest)** - Enables you to maintain a write off request creation upload request. • **Bill Cycle Rule Characteristic Upload (i.e., C1-BillCycleRuleCharUpdUplReq)** - Enables you to maintain a bill cycle rule	

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Field Name	Field Description	Mandatory (Yes or No)
	characteristic creation or modification upload request. **Note:** The above mentioned business objects are shipped with the product. The list includes those business objects which are created using the **Upload Request (Adjustment Upload)** (i.e., **C1-UPLREQ**) or **Upload Request** (i.e., **C1-UPLOADREQ**) maintenance object depending on the business object used to create the upload request type.	
Description	Used to specify the description for the upload request type.	Yes
Detailed Description	Used to specify additional information about the upload request type. **Note:** You can resize the text box depending on your requirement by clicking the **Resize Handle** (⊿) icon at the bottom right corner of the text box.	No
Status	Used to indicate the status of the upload request type. The valid values are: • Active • Inactive **Note:** You cannot change the status of an upload request type to **Inactive** when the corresponding upload request is in a status other than **Canceled**, **Rejected**, or **Processed**.	Yes
File Size (KB)	Used to indicate the maximum file size limit (in kilobytes) while uploading files using the upload request type. **Note:** You must specify a positive integer value in this field. This field appears when you are creating an upload request type using the **C1-AdjRequestType** business object. By default, the maximum file size limit is set to 700 KB in all the business objects which are created using the **Upload Request** (i.e., **C1-UPLOADREQ**) maintenance object. Therefore, you don't need to explicitly set the maximum file size limit while defining an upload request type using the **C1-UplRequestType** business object.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
Defer Algorithm	Used to attach an algorithm that will be triggered when you click the **Create Adjustment** or **Approve** button. **Note:** The **Search** (🔍) icon appears corresponding to the **Defer Algorithm** field. On clicking the **Search** icon, the **Algorithm Search** window appears. You need to attach an algorithm created using the **C1-UPLDEFEVL** algorithm type to this field. This algorithm checks whether the number of records in the uploaded file exceeds the specified online record process limit. If the number of records in the uploaded file does not exceed the online record process limit, the system creates the adjustments in the real time (i.e., immediately). However, if the number of records in the uploaded file exceeds the online record process limit, the system creates the adjustments in the deferred mode. The **Deferred** mode means in the background when the **Upload Request Periodic Monitor (C1-UPLRQ)** batch is executed. You can configure the **Upload Request Periodic Monitor (C1-UPLRQ)** batch such that it is executed at regular intervals. For more information about the batch, see *Oracle Revenue Management and Billing Batch Guide*. This field appears when you are creating an upload request type using the **C1-AdjRequestType** business object.	Yes
Entity Business Object	Used to indicate the business object using which you want to create or update the entities through the respective upload request. You must use the following entity business object for the respective upload request type: • While defining an accounts' bill cycle update upload request type, you must set the entity business object to **C1-AccountBO**. • While defining a bill group derivation and pricing parameters record creation upload request type, you must set the entity business object to **C1-BillLevel**. • While defining a bill group sort record creation upload request type, you must set the entity business object to **C1-BillingGroupSortId**. • While defining a billable charge creation upload request type, you must set the entity business object to **C1-BILLCHARGE**.	No

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Field Name	Field Description	Mandatory (Yes or No)
	• While defining a contract rider update upload request type, you must set the entity business object to **C1_SA**. • While defining a hold request creation upload request type, you must set the entity business object to **C1-HoldRequest**. • While defining a refund request creation upload request type, you must set the entity business object to **C1-RefundReq**. • While defining a policy reinstatement upload request type, you must set the entity business object to **C1-POLICY**. • While defining a write off request creation upload request type, you must set the entity business object to **C1-WORequest**. • While defining a bill cycle rule characteristic creation or modification upload request type, you must set the entity business object to **C1-AccountBO**. **Note:** The **Search** (🔍) icon appears corresponding to the **Entity Business Object** field. On clicking the **Search** icon, the **Business Object Search** window appears. This field appears when you are creating an upload request type using the **C1-UplRequestType** business object. The **Upload Request** feature enables you to upload business object based entities and non business object based entities in the system. If you want to create business object based entities through the respective upload request, you need to specify the entity business object in the upload request type. However, if you want to create non business object based entities (i.e., entities created via any business service) through the respective upload request, you do not need to specify the entity business object in the upload request type. For example, while defining a payment tender cancellation upload request type, you do not need to specify the entity business object.	
Approval Required	Used to indicate whether approval is required while creating or updating entities through the respective upload request.	No
Approval To Do Type	Used to indicate that the To Do entry of the specified To Do type must be created when an upload request is submitted for approval.	Yes (Conditional)

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The **Search** (🔍) icon appears corresponding to the **Approval To Do Type** field. On clicking the **Search** icon, the **To Do Type Search** window appears. On specifying the To Do type, the description of the To Do type appears corresponding to the **Approval To Do Type** field. This field appears when the **Approval Required** option is selected. You can use the respective To Do type mentioned in the prerequisites or a custom To Do type, if required.	**Note:** This field is required when the **Approval Required** option is selected.
Approval To Do Role	Used to indicate that users with the specified To Do role can only approve an upload request which is submitted for approval. **Note:** The list includes only those To Do roles which are associated with the approval To Do type. This field appears when the **Approval Required** option is selected.	Yes (Conditional) **Note:** This field is required when the **Approval Required** option is selected.
FK Reference Code	Used to indicate the foreign key reference using which you want to display information about the entity once it is created through an upload request. **Note:** If the foreign key reference is specified in the upload request type, the system displays the entity information for the respective upload requests in the **Data Records** zone of the **Upload Request** screen once the entity is created (i.e., once the upload request is processed). However, if the foreign key reference is not specified in the upload request type, the system does not display the entity information for the respective upload requests. The **Search** (🔍) icon appears corresponding to the **FK Reference Code** field. On clicking the **Search** icon, the **Foreign Key Search** window appears. This field appears when you are creating an upload request type using the **C1-UplRequestType** business object.	No

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> **Tip:** Alternatively, you can click the **Edit** button in the **Upload Request Type** zone to edit the details of the upload request type.

5. Modify the required details in the **Main** section.
6. Define, edit, or remove a match type from the adjustment upload request type, if required.
7. Define, edit, or remove characteristics of the upload request type, if required.
8. Click **Save**.
   The changes made to the upload request type are saved.

Related Topics

For more information on...	See...
Upload Request Type screen	Upload Request Type on page 1399
Upload Request Type List zone	Upload Request Type List on page 1400
Upload Request Type zone	Upload Request Type on page 1401
How to define a match type for an adjustment upload request type	Associating a Match Type with an Adjustment Upload Request Type on page 1413
How to define a characteristic for an upload request type	Defining a Characteristic for an Upload Request Type on page 1415

Copying an Upload Request Type

Instead of creating an upload request type from scratch, you can create a new upload request type using an existing upload request type. This is possible through copying an upload request type. On copying an upload request type, the details including the match types (only for adjustments) and characteristics are copied to the new upload request type. You can then edit the details, if required.

> **Note:** While copying an upload request type, the system does not copy the mapping details from the original upload request type to the new upload request type. You need to manually define the mapping details for the new upload request type.

Prerequisites

To copy an upload request type, you should have:

If you want to copy...	Then, you should have...
An adjustment upload request type	• An adjustment upload request type (whose copy you want to create) defined in the application • Upload request business objects defined in the application • A defer algorithm created using the **C1-UPLDEFEVL** algorithm type in the application • Required To Do role assigned to the **C1-ADJUP** To Do type in the application • An algorithm created using the **C1-MTCIALG** or **C1-MTCTALG** algorithm type in the application depending on the match type using which you want to create the adjustments
An accounts' bill cycle update upload request type	• An accounts' bill cycle update upload request type (whose copy you want to create) defined in the application • Upload request business objects defined in the application • Required To Do role assigned to the **C1-BCUUR** To Do type in the application

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If you want to copy...	Then, you should have...
	• Required entity business object (for example, C1-AccountBO) defined in the application • Required foreign key reference for the account (for example, C1-ACCT) defined in the application

A bill group derivation and pricing parameters record creation upload request type	• Upload request type business objects defined in the application
	• Upload request business objects defined in the application
	• An approval To Do type named **C1-BGDVP** created with the following specifications:
	  • **Navigation Option** - c1upldrqTabMenu
	  • **Sort Key** - Upload Request ID
	  • **Drill Key Table** - C1_UPLOAD_REQ
	  • **Drill Key Field** - UPLOAD_REQ_ID
	• Required To Do role assigned to the **C1-BGDVP** To Do type in the application
	• Required entity business object (for example, C1-BillLevel) defined in the application
	• Required foreign key reference for the bill group (i.e., person) defined in the system.

A bill group sort record creation upload request type	• Upload request type business objects defined in the application
	• Upload request business objects defined in the application
	• An approval To Do type named **C1-BGSRT** created with the following specifications:
	  • **Navigation Option** - c1upldrqTabMenu
	  • **Sort Key** - Upload Request ID
	  • **Drill Key Table** - C1_UPLOAD_REQ
	  • **Drill Key Field** - UPLOAD_REQ_ID
	• Required To Do role assigned to the **C1-BGSRT** To Do type in the application
	• Required entity business object (for example, C1-BillingGroupSortId) defined in the application
	• Required foreign key reference for the bill group (i.e., person) defined in the system.

A billable charge creation upload request type (for the fully insured group and individual lines of business)	• A billable charge creation upload request type (whose copy you want to create) defined in the application • Upload request business objects defined in the application • Required To Do role assigned to the **C1-BCUR** To Do type in the application • Required entity business object (for example, C1-BILLCHARGE) defined in the application • Required foreign key reference for the billable charge (for example, C1-BCHIN) defined in the application
A contract rider update upload request type	• A contract rider update upload request type (whose copy you want to create) defined in the application • Upload request business objects defined in the application • Required To Do role assigned to the **C1-CRUUR** To Do type in the application • Required entity business object (for example, C1_SA) defined in the application • Required foreign key reference for the contract defined in the application

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If you want to copy...	Then, you should have...
A hold request creation upload request type	• A hold request creation upload request type (whose copy you want to create) defined in the application • Upload request business objects defined in the application • Required To Do role assigned to the **C1-HLDUR** To Do type in the application • Required entity business object (for example, C1-HoldRequest) defined in the application • Required foreign key reference for the hold request (for example, C1-HLDRE) defined in the application
A refund request creation upload request type	• A refund request creation upload request type (whose copy you want to create) defined in the application • Upload request business objects defined in the application • Required To Do role assigned to the **C1-REFUR** To Do type in the application • Required entity business object (for example, C1-RefundReq) defined in the application • Required foreign key reference for the refund request (for example, C1-REFWO) defined in the application
A policy reinstatement upload request type	• A policy reinstatement upload request type (whose copy you want to create) defined in the application • Upload request business objects defined in the application • Required To Do role assigned to the **C1-RPUR** To Do type in the application • Required entity business object (for example, C1-POLICY) defined in the application • Required foreign key reference for the policy (for example, C1-POLCY) defined in the application
A payment tender cancellation upload request type	• A payment tender cancellation upload request type (whose copy you want to create) defined in the application • Upload request business objects defined in the application • Required To Do role assigned to the **C1-TNDCL** To Do type in the application • Required foreign key reference for the payment event (for example, C1-PEVT) defined in the application
A write off request creation upload request type	• A write off request creation upload request type (whose copy you want to create) defined in the application • Upload request business objects defined in the application • Required To Do role assigned to the **C1-WOUR** To Do type in the application • Required entity business object (for example, C1-WORequest) defined in the application • Required foreign key reference for the write off request (for example, C1-REFWO) defined in the application
A bill cycle rule characteristic creation or modification upload request type	• A bill cycle rule characteristic creation or modification upload request type (whose copy you want to create) defined in the application • Upload request business objects defined in the application • Required To Do role assigned to the **C1-BCRUR** To Do type in the application • Required entity business object (for example, C1-AccountBO) defined in the application

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If you want to copy...	Then, you should have...
	• Required foreign key reference for the account (for example, C1-ACCT) defined in the application

Procedure

To copy an upload request type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **U** and then click **Upload Request Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Upload Request Type** sub-menu.
   The **Upload Request Type** screen appears.
4. In the **Upload Request Type List** zone, click the **Duplicate**(⧉) icon in the **Duplicate** column *c*orresponding to the upload request type whose copy you want to create.

   The **Upload Request Type** screen appears. It contains the following sections:

   - **Main** - Used to specify the basic details for the upload request type.
   - **Adjustment Match Type** - Used to specify the match type using which you want to create adjustments for the respective adjustment upload requests.

     Note: This section appears when you are creating an upload request type using the **C1-AdjRequestType** business object.
   - **Characteristics** - Used to define the characteristics for the upload request type.

   The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Upload Request Type	Used to specify the upload request type.	Yes
Upload Request Type Business Object	Indicates the business object using which you are defining the upload request type.	Not applicable
Upload Request Business Object	Used to indicate the business object using which you want to create the respective upload request. If you are creating an upload request type using the **C1-AdjRequestType** business object, the valid value is: • **Adjustment Upload Request (i.e., C1-ADJUPLD)** - Enables you to maintain an adjustment upload request. However, if you are creating an upload request type using the **C1-UplRequestType** business object, the valid values are: • **Bill Cycle Update Upload (i.e., C1-BillCycleUpdateUplReq)** - Enables you to maintain an accounts' bill cycle update upload request. • **Bill Group Derivation & Pricing Parameter (i.e., C1-BillLevelUploadRequest)** - Enables you to maintain a bill group derivation and pricing parameters record creation upload request.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	• **Bill Group Sorting Upload Request (i.e., C1-BillGrpSortUploadRequest)** - Enables you to maintain a bill group sort record creation upload request. • **Billable Charge Upload for Fully Insured (i.e., C1-BillableChargeUploadFI)** - Enables you to maintain a billable charge creation upload request. Note that this business object is only applicable for the fully insured group and individual lines of health insurance business. • **Contract Rider Upload (i.e., C1-ContractRiderUpdateUplReq)** - Enables you to maintain a contract rider update upload request. • **Hold Request Upload (i.e., C1-HoldUploadRequest)** - Enables you to maintain a hold request creation upload request. • **Refund Request Upload (i.e., C1-RefundUploadRequest)** - Enables you to maintain a refund request creation upload request. • **Reinstatement Upload Request (i.e., C1-ReinstatementUploadRequest)** - Enables you to maintain a policy reinstatement upload request. • **Tender Cancelation Upload Request (i.e., C1-TndrCnclUploadRequest)** - Enables you to maintain a payment tender cancellation upload request. • **Write Off Request Upload (i.e., C1-WriteOffUploadRequest)** - Enables you to maintain a write off request creation upload request. • **Bill Cycle Rule Characteristic Upload (i.e., C1-BillCycleRuleCharUpdUplReq)** - Enables you to maintain a bill cycle rule characteristic creation or modification upload request. **Note:** The above mentioned business objects are shipped with the product. The list includes those business objects which are created using the **Upload Request (Adjustment Upload)** (i.e., **C1-UPLREQ**) or **Upload Request** (i.e., **C1-UPLOADREQ**) maintenance object depending on the business object used to create the upload request type.	
Description	Used to specify the description for the upload request type.	Yes
Detailed Description	Used to specify additional information about the upload request type.	No

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Field Name	Field Description	Mandatory (Yes or No)
	Note: You can resize the text box depending on your requirement by clicking the **Resize Handle** (⇲) icon at the bottom right corner of the text box.	
Status	Used to indicate the status of the upload request type. The valid values are: • Active • Inactive	Yes
File Size (KB)	Used to indicate the maximum file size limit (in kilobytes) while uploading files using the upload request type. **Note:** You must specify a positive integer value in this field. This field appears when you are creating an upload request type using the **C1-AdjRequestType** business object. By default, the maximum file size limit is set to 700 KB in all the business objects which are created using the **Upload Request** (i.e., **C1-UPLOADREQ**) maintenance object. Therefore, you don't need to explicitly set the maximum file size limit while defining an upload request type using the **C1-UplRequestType** business object.	Yes
Defer Algorithm	Used to attach an algorithm that will be triggered when you click the **Create Adjustment** or **Approve** button.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The **Search** (🔍) icon appears corresponding to the **Defer Algorithm** field. On clicking the **Search** icon, the **Algorithm Search** window appears. You need to attach an algorithm created using the **C1-UPLDEFEVL** algorithm type to this field. This algorithm checks whether the number of records in the uploaded file exceeds the specified online record process limit. If the number of records in the uploaded file does not exceed the online record process limit, the system creates the adjustments in the real time (i.e., immediately). However, if the number of records in the uploaded file exceeds the online record process limit, the system creates the adjustments in the deferred mode. The **Deferred** mode means in the background when the **Upload Request Periodic Monitor (C1-UPLRQ)** batch is executed. You can configure the **Upload Request Periodic Monitor (C1-UPLRQ)** batch such that it is executed at regular intervals. For more information about the batch, see *Oracle Revenue Management and Billing Batch Guide*. This field appears when you are creating an upload request type using the **C1-AdjRequestType** business object.	
Entity Business Object	Used to indicate the business object using which you want to create or update the entities through the respective upload request. You must use the following entity business object for the respective upload request type: • While defining an accounts' bill cycle update upload request type, you must set the entity business object to **C1-AccountBO**. • While defining a bill group derivation and pricing parameters record creation upload request type, you must set the entity business object to **C1-BillLevel**. • While defining a bill group sort record creation upload request type, you must set the entity business object to **C1-BillingGroupSortId**. • While defining a billable charge creation upload request type, you must set the entity business object to **C1-BILLCHARGE**. • While defining a contract rider update upload request type, you must set the entity business object to **C1_SA**.	No

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Field Name	Field Description	Mandatory (Yes or No)
	• While defining a hold request creation upload request type, you must set the entity business object to **C1-HoldRequest**. • While defining a refund request creation upload request type, you must set the entity business object to **C1-RefundReq**. • While defining a policy reinstatement upload request type, you must set the entity business object to **C1-POLICY**. • While defining a write off request creation upload request type, you must set the entity business object to **C1-WORequest**. • While defining a bill cycle rule characteristic creation or modification upload request type, you must set the entity business object to **C1-AccountBO**. **Note:** The **Search** (🔍) icon appears corresponding to the **Entity Business Object** field. On clicking the **Search** icon, the **Business Object Search** window appears. This field appears when you are creating an upload request type using the **C1-UplRequestType** business object. The **Upload Request** feature enables you to upload business object based entities and non business object based entities in the system. If you want to create business object based entities through the respective upload request, you need to specify the entity business object in the upload request type. However, if you want to create non business object based entities (i.e., entities created via any business service) through the respective upload request, you do not need to specify the entity business object in the upload request type. For example, while defining a payment tender cancellation upload request type, you do not need to specify the entity business object.	
Approval Required	Used to indicate whether approval is required while creating or updating entities through the respective upload request.	No
Approval To Do Type	Used to indicate that the To Do entry of the specified To Do type must be created when an upload request is submitted for approval.	Yes (Conditional)

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The **Search** (🔍) icon appears corresponding to the **Approval To Do Type** field. On clicking the **Search** icon, the **To Do Type Search** window appears. On specifying the To Do type, the description of the To Do type appears corresponding to the **Approval To Do Type** field. This field appears when the **Approval Required** option is selected. You can use the respective To Do type mentioned in the prerequisites or a custom To Do type, if required.	**Note:** This field is required when the **Approval Required** option is selected.
Approval To Do Role	Used to indicate that users with the specified To Do role can only approve an upload request which is submitted for approval. **Note:** The list includes only those To Do roles which are associated with the approval To Do type. This field appears when the **Approval Required** option is selected.	Yes (Conditional) **Note:** This field is required when the **Approval Required** option is selected.
FK Reference Code	Used to indicate the foreign key reference using which you want to display information about the entity once it is created through an upload request. **Note:** If the foreign key reference is specified in the upload request type, the system displays the entity information for the respective upload requests in the **Data Records** zone of the **Upload Request** screen once the entity is created (i.e., once the upload request is processed). However, if the foreign key reference is not specified in the upload request type, the system does not display the entity information for the respective upload requests. The **Search** (🔍) icon appears corresponding to the **FK Reference Code** field. On clicking the **Search** icon, the **Foreign Key Search** window appears. This field appears when you are creating an upload request type using the **C1-UplRequestType** business object.	No

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> **Tip:** Alternatively, you can click the **Duplicate** button in the **Upload Request Type** zone to create a copy of the upload request type.

5. Enter the required details in the **Main** section.
6. Define, edit, or remove a match type from the adjustment upload request type, if required.
7. Define, edit, or remove characteristics of the upload request type, if required.
8. Click **Save**.
   The new upload request type is defined.

Related Topics

For more information on...	See...
Upload Request Type screen	Upload Request Type on page 1399
Upload Request Type List zone	Upload Request Type List on page 1400
Upload Request Type zone	Upload Request Type on page 1401
How to define a match type for an adjustment upload request type	Associating a Match Type with an Adjustment Upload Request Type on page 1413
How to define a characteristic for an upload request type	Defining a Characteristic for an Upload Request Type on page 1415

Mapping Data and Configuring Filters for an Upload Request Type

The **Upload Request Mapping** screen enables you to do the following:

- **Map the Data of the CSV File** - To read the data from a Comma-Separated Values (CSV) file, you need to map its columns with the schema of the upload request business object. The system will then store the data in the respective tags of the upload request business object schema. While mapping the columns with the schema, you need to specify the column headers that would appear in the CSV file. The system will then create the XML tags by converting the column header into camelCase after removing the spaces from the column header. For example, if the header in the CSV file is Account Id, then the corresponding XML tag formed by the system is accountId. The system will then store the data from the column in the respective tag of the upload request business object schema.

  > **Note:** You need to map the columns of the CSV file in the sequence as mentioned in the respective CSV format.

- **Configure the Search Filters** - The system enables you to configure maximum 10 search filters for an upload request type. It then displays the search filters (in the specified sequence) in the **Data Records** zone of the **Upload Request** screen while viewing the details of the respective upload requests.

Once an upload request is created using an upload request type, you cannot change the mapping details and search filters of the upload request type. In addition, while copying an upload request type, the system does not copy the mapping details and search filters from the original upload request type to the new upload request type. You need to manually define the mapping details and search filters for the new upload request type.

> **Note:** This screen is applicable only for an upload request type which is created using the **C1-UplRequestType** business object and not for an upload request type which is created using the**C1-AdjRequestType** business object.

Procedure

To map the data and configure search filters for an upload request type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **U** and then click **Upload Request Type**.

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A sub-menu appears.

3. Click the **Search** option from the **Upload Request Type** sub-menu.
   The **Upload Request Type** screen appears.
4. In the **Upload Request Type List** zone, click the **Mapping**(🔗) icon in the **Mapping** column corresponding *t*o the upload request type whose details you want to edit.

   The **Upload Request Mapping** screen appears. It contains the following field:

Field Name	Field Description
Upload Request Type	Displays the description of the upload request type.

In addition, it contains the following columns:

Column Name	Column Description	Mandatory (Yes or No)
CSV Column Header	Used to specify the column header of a CSV file that you would upload using the upload request type.	Yes
Searchable	Used to indicate whether you want to create a field for the column header and provide the ability to filter the data records using it. The system will then accordingly display the fields and columns in the **Data Records** zone of the **Upload Request** screen.	Yes (Conditional) **Note:** This field is required when you are configuring a search filter for the upload request type.
	Note: You can select this option for maximum 10 column headers in the upload request type.	
Sequence	Used to indicate the order in which you want to display the corresponding fields and columns in the **Data Records** zone of the **Upload Request** screen.	Yes
	Note: You must specify a positive integer value in this field.	

5. Enter the required details in **Upload Request Mapping** screen.

Note: If you want to add more than one column header, click the **Add** (+) icon and then specify the details. However, if you want to remove a column header, click the **Delete** (🗑) icon corresponding to the column header.

6. Click **Save**.
   The mapping details are saved for the upload request type.

Related Topics

For more information on...	See...
Upload Request Type screen	Upload Request Type on page 1399
Upload Request Type List zone	Upload Request Type List on page 1400
Mass Accounts' Bill Cycle Update CSV Format	Mass Accounts' Bill Cycle Update CSV Format on page 2025
Mass Contract Rider Update CSV Format	Mass Contract Rider Update CSV Format on page 2031
Mass Hold Request Creation CSV Format	Mass Hold Request Creation CSV Format on page 2040
Mass Refund Request Creation CSV Format	Mass Refund Request Creation CSV Format on page 2056
Mass Write Off Request Creation CSV Format	Mass Write Off Request Creation CSV Format on page 2065

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For more information on...	See...
Mass Policy Reinstatement CSV Format	Mass Policy Reinstatement CSV Format on page 2074
Mass Bill Group Sort Record Creation CSV Format	Mass Bill Group Sort Record Creation CSV Format on page 2080
Mass Bill Group Derivation and Pricing Parameters Record Creation CSV Format	Mass Bill Group Derivation and Pricing Parameters Record Creation CSV Format on page 2089
Mass Billable Charge Creation CSV Format (Fully Insured Group)	Mass Billable Charge Creation CSV Format (Fully Insured Group) on page 2101
Mass Billable Charge Creation CSV Format (Fully Insured Individual)	Mass Billable Charge Creation CSV Format (Fully Insured Individual) on page 2107
Mass Payment Tender Cancellation CSV Format	Mass Payment Tender Cancellation CSV Format on page 2119
Mass Bill Cycle Rule Characteristic Creation or Modification CSV Format	Mass Bill Cycle Rule Characteristic Creation or Modification CSV Format on page 2126

Deleting an Upload Request Type

Procedure

To delete an upload request type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **U** and then click **Upload Request Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Upload Request Type** sub-menu.
   The **Upload Request Type** screen appears.
4. In the **Upload Request Type List** zone, click the **Delete** (🗑) icon in the **Delete** column corresponding to the *u*pload request type that you want to delete.

   A message appears confirming whether you want to delete the upload request type.

   Note: You can delete an upload request type only when an upload request is not yet created using the upload request type.

   Tip: Alternatively, you can click the **Delete** button in the **Upload Request Type** zone to delete the upload request type.
5. Click **OK**.
   The upload request type is deleted.

Related Topics

For more information on...	See...
Upload Request Type screen	Upload Request Type on page 1399
Upload Request Type List zone	Upload Request Type List on page 1400
Upload Request Type zone	Upload Request Type on page 1401

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Viewing the Upload Request Type Details

Procedure

To view the details of an upload request type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **U** and then click **Upload Request Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Upload Request Type** sub-menu.
   The **Upload Request Type** screen appears.
4. In the **Upload Request Type List** zone, click the **Broadcast** (ᯤ) icon corresponding to the upload request type whose details you want to view.
   The **Upload Request Type** zone appears.
5. View the details of the upload request type in the **Upload Request Type** zone.

Related Topics

For more information on...	See...
Upload Request Type screen	Upload Request Type on page 1399
Upload Request Type List zone	Upload Request Type List on page 1400
Upload Request Type zone	Upload Request Type on page 1401

Adjustment Upload Request (Used for Searching)

The **Adjustment Upload Request** screen allows you to search for an adjustment upload request using various search criteria. It also allows you to create an adjustment upload request. It contains the following zone:

- Search Adjustment Upload Request on page 1436

Through this screen, you can navigate to the following screen:

- Adjustment Upload Request (Used for Viewing) on page 1442

Search Adjustment Upload Request

The **Search Adjustment Upload Request** zone allows you to search for an adjustment upload request using various search criteria. It contains the following two sections:

- **Search Criteria** - The **Search Criteria** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Search By	Used to indicate whether you want to search for an adjustment upload request using the request details. The valid value is: • Upload Request **Note:** By default, the **Upload Request** option is selected.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
Upload Request Type	Used to search for adjustment upload requests which are created using a particular upload request type. **Note:** The list includes only those upload request types which are created using the **C1-AdjRequestType** business object and are in the **Active** status.	No
Status	Used to search for adjustment upload requests with a particular status. The valid values are: • Approved • Cancelled • Completed • Create Adjustment • Creating Adjustment • Deferred • Pending • Rejected • Pending For Approval	No
Upload From Date	Used to search for adjustment upload requests which are created from a particular date onwards. **Note:** By default, the current date appears in this field. You can either manually specify the date or select it using the **Date Picker** ( ) icon corresponding to the field.	No
To	Used to search for adjustment upload requests which are created till a particular date. **Note:** By default, the current date appears in this field. You can either manually specify the date or select it using the **Date Picker** ( ) icon corresponding to the field.	No
File Name	Used to search for an adjustment upload request through which a particular file is uploaded.	No

Note: You must specify at least one search criterion while searching for an adjustment upload request.

- **Search Results** - On clicking the **Search** button, the search results appear based on the specified search criteria. The **Search Results** section contains the following columns:

Column Name	Column Description
Upload Date	Displays the date and time when the adjustment upload request is created.
Upload Request Information	Displays information about the adjustment upload request.

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Column Name	Column Description
	Note: It has a link. On clicking the link, the **Adjustment Upload Request** screen appears where you can view the details of the respective adjustment upload request. This information string is generated through the **C1-FLREQ-INF** algorithm attached to the **Information** system event of the **C1-ADJUPLD** business object. It concatenates the following fields — Upload Request Type Description, Upload Request Status Description, Upload Request ID.
Status	Indicates the status of the adjustment upload request. The valid values are: • Approved • Cancelled • Completed • Create Adjustment • Creating Adjustment • Deferred • Pending • Rejected • Pending For Approval
Upload Request Type	Indicates the upload request type using which the adjustment upload request is created.
File Name	Indicates the file uploaded through the adjustment upload request.

Note: Pagination is used to display limited number of records in the **Search Results** section. You can use the navigation links, such as **Previous** and **Next** to navigate between pages. Note that the navigation links appear in the **Search Results** section only when the records in the search results exceed 10.

Note: You can upload an adjustment data file by clicking the **Upload** link in the upper right corner of this zone.

Related Topics

For more information on...	See...
How to search for an adjustment upload request	Searching for an Adjustment Upload Request on page 1438
How to upload an adjustment data file	Uploading an Adjustment Data File on page 1439
How to view the details of an adjustment upload request	Viewing the Adjustment Upload Request Details on page 1441

Searching for an Adjustment Upload Request

Prerequisites

To search for an adjustment upload request, you should have:

- Upload request types created using the **C1-AdjRequestType** business object in the **Active** status

Procedure

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To search for an adjustment upload request:

1. Click the **Menu** link in the **Application** toolbar.
   A list appears.
2. From the **Main** menu, select **Billing Management** and then click **Adjustment Upload Request**.
   The **Adjustment Upload Request** screen appears.
3. Enter the search criteria in the **Search Adjustment Upload Request** zone.

   Note: ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.
4. Click **Search**.
   A list of adjustment upload requests that meet the search criteria appears in the **Search Results** section.

Related Topics

For more information on...	See...
Adjustment Upload Request screen	Adjustment Upload Request (Used for Searching) on page 1436
Search Adjustment Upload Request zone	Search Adjustment Upload Request on page 1436

Uploading an Adjustment Data File

Prerequisites

To upload an adjustment data file, you should have:

- An upload request type which is created using the **C1-AdjRequestType** business object and where the upload request business object is set to **Adjustment Upload Request (i.e., C1-ADJUPLD)** and the status is set to **Active**
- An adjustment data file in the required CSV format

Procedure

To upload an adjustment data file:

1. Click the **Menu** link in the **Application** toolbar.
   A list appears.
2. From the **Main** menu, select **Billing Management** and then click **Adjustment Upload Request**.
   The **Adjustment Upload Request** screen appears.
3. Click the **Upload** link in the upper right corner of the **Search Adjustment Upload Request** zone.

   The **Adjustment Upload Data File** screen appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Upload Request Type	Used to indicate the upload request type using which you want to create the adjustment upload request. **Note:** The list includes only those upload request types which are created using the **C1-AdjRequestType** business object and are in the **Active** status.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
Replace Existing File	Used to indicate whether you want to replace any existing file in the system. You must select this option when you want to upload the same file once again. **Note:** You can upload a file once again only when the adjustment upload request with the same file is in the **Rejected** or **Cancelled** status.	No
File Name	Used to specify the Comma Separated Values (CSV) file that you want to upload. **Note:** You can click the **Choose File** button corresponding to the **File Name** field to browse and select the file that you want to upload. Note that you can upload a file from a local machine and not from the server location. The system does not allow you to upload a file which exceeds the maximum file size limit (in kilobytes) specified in the respective adjustment upload request type. Therefore, you must ensure that the file size is within the maximum limit. The file name must be unique and should not exceed 60 characters. At least one record should be present in the file along with the column headers.	Yes

4. Select the upload request type using which you want to upload the adjustment data file.
5. Click the **Choose File** button corresponding to the **File Name** field.
   The **Open** dialog box appears.
6. Browse to the location where the adjustment data file that you want to upload is available in the system.
7. Click **Open**.
   The adjustment data file name appears in the **File Name** field.
8. Select the **Replace Existing File** option depending on whether you want to upload the same file once again in the system.
9. Click **Submit**.

   A message appears indicating that the data is uploaded successfully. In addition, a grid appears which helps you to preview all records in the adjustment data file. It contains the following columns:

Column Name	Column Description
Errors	Indicates the reason why the adjustment record is invalid. If there are multiple reasons, the comma-separated list of error messages appears in this column. **Note:** This column appears when you click the **Save** button.
Account Identifier Type	Indicates the account identifier type.
Account Identifier	Displays the account identifier.
Account ID	Indicates the account for which you want to create the adjustment.

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Column Name	Column Description
Match Type	Indicates the match type using which you want to identify the contract against which the adjustment should be created. The valid values are: • CNTY • CONT
Match Value	Indicates the contract or contract type depending on the specified match type.
Adjustment Type	Indicates the adjustment type using which you want to create the adjustment.
Adjustment Amount	Displays the adjustment amount.
Currency Code	Indicates the currency in which you want to create the adjustment.
Comments	Displays additional information about the adjustment.
Bill ID	Indicates the completed bill against which you want to create the adjustment.
Arrears Date	Displays the date from when the adjustment's financial transaction should start aging.
Char Type 1, Char Type 2, ..., Char Type 5	Indicates the characteristic type.
Char Value 1, Char Value 2, ..., Char Value 5	Displays the value for the characteristic type.

10. Click **Save**.

    The system validates each record in the adjustment data file. If an error occurs while validating the record, the error message appears corresponding to the record in the **Errors** column. Unless, you correct the errors in the respective records, you will not be able to upload the adjustment data file. Once the adjustment data file is successfully validated, the status of the adjustment upload request is set to **Pending**.

Related Topics

For more information on...	See...
Adjustment Upload Request screen	Adjustment Upload Request (Used for Searching) on page 1436
Search Adjustment Upload Request zone	Search Adjustment Upload Request on page 1436

Viewing the Adjustment Upload Request Details

Procedure

To view the details of an adjustment upload request:

1. Search for the adjustment upload request in the **Adjustment Upload Request** screen.
2. In the **Search Results** section, click the link in the **Upload Request Information** column corresponding to the *a*djustment upload request whose details you want to view.

   The **Adjustment Upload Request** screen appears. It contains following tabs:

   - Adjustment Upload Request - Main on page 1442
   - Adjustment Upload Request - Log on page 1445
3. Ensure that the **Main** tab is selected.
4. View the details of the upload request in the **Adjustment Upload Request** zone.
5. View the records uploaded through the CSV file in the **Adjustment Data Records** zone.

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Related Topics

For more information on...	See...
How to search for an adjustment upload request	Searching for an Adjustment Upload Request on page 1438
Adjustment Upload Request screen	Adjustment Upload Request (Used for Viewing) on page 1442
Adjustment Upload Request zone	Adjustment Upload Request on page 1442
Adjustment Data Records zone	Adjustment Data Records on page 1444

Adjustment Upload Request (Used for Viewing)

Once you create an adjustment upload request, the **Adjustment Upload Request** screen allows you to:

- View the details of the adjustment upload request
- View the details of each adjustment data record
- Cancel the adjustment upload request
- Create the adjustment for each adjustment data record uploaded through the CSV file
- Submit the adjustment upload request for approval
- Approve or reject the adjustment upload request
- View the log of the adjustment upload request
- Add a log entry for the adjustment upload request

This screen consists of the following tabs:

- Adjustment Upload Request - Main on page 1442
- Adjustment Upload Request - Log on page 1445

Adjustment Upload Request - Main

The **Main** tab displays information about the adjustment upload request. It contains the following zones:

- Adjustment Upload Request on page 1442
- Adjustment Data Records on page 1444

Adjustment Upload Request

The **Adjustment Upload Request** zone displays the details of the adjustment upload request. It contains the following sections:

- **Main** - Displays the basic information about the adjustment upload request. It contains the following fields:

Field Name	Field Description
Upload Request Information	Displays information about the adjustment upload request.
Status	Indicates the status of the adjustment upload request. The valid values are: • Approved • Cancelled • Completed • Create Adjustment • Creating Adjustment

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Field Name	Field Description
	• Deferred • Pending • Rejected • Pending For Approval
Status Reason	Indicates the reason why the adjustment data file is cancelled or rejected.
	Note: This field appears when the adjustment upload request is in the **Cancelled** or **Rejected** status. It has a link. On clicking the link, the **Status Reason** screen appears where you can view the details of the respective status reason.
File Name	Indicates the adjustment data file uploaded through the adjustment upload request.

- **Record Actions** - Enables you to perform various actions on the adjustment upload request. It contains the following buttons:

Button Name	Button Description
Cancel File	Used to cancel the adjustment data file.
	Note: The **Cancel File** button appears when the adjustment upload request is in the **Pending** status.
Create Adjustment	Used to create adjustments for the records which are uploaded through the adjustment data file.
	Note: The **Create Adjustment** button appears when the following conditions are met: • The adjustment upload request is in the **Pending** status. • The approval process is not configured for the upload request type using which adjustment upload request is created.
Submit for Approval	Used to submit the adjustment upload request for approval.
	Note: The **Submit for Approval** button appears when the following conditions are met: • The adjustment upload request is in the **Pending** status. • The approval process is configured for the upload request type using which adjustment upload request is created.
Approve	Used to approve the adjustment upload request.
	Note: The **Approve** button appears when the following conditions are met: • The adjustment upload request is in the **Pending For Approval** status. • A user with the approval To Do role is reviewing the adjustment upload request.

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Button Name	Button Description
Reject	Used to reject the adjustment upload request.
	Note: The **Reject** button appears when the following conditions are met: • The adjustment upload request is in the **Pending For Approval** status. • A user with the approval To Do role is reviewing the adjustment upload request.

- **Record Information** - This section contains the following fields:

Field Name	Field Description
Business Object	Indicates the business object using which the adjustment upload request is created. In addition, a context menu (⊙) icon appears corresponding to this field which helps in navigating to other screens in the application.
	Note: It has a link. On clicking the link, the **Business Object** screen appears where you can view the details of the respective business object.
Status Date/Time	Displays the date and time when the adjustment upload request status is updated.
Create Date/Time	Displays the date and time when the adjustment upload request is created.

Related Topics

For more information on...	See...
How to cancel an adjustment upload request	Canceling an Adjustment Upload Request on page 1446
How to create adjustments for an adjustment upload request	Creating Adjustments for an Adjustment Upload Request on page 1447
How to submit an adjustment upload request for approval	Submitting an Adjustment Upload Request for Approval on page 1448
How to approve an adjustment upload request	Approving an Adjustment Upload Request on page 1449
How to reject an adjustment upload request	Rejecting an Adjustment Upload Request on page 1450

Adjustment Data Records

The **Adjustment Data Records** zone lists the records uploaded from the CSV file through the adjustment upload request. It contains the following columns:

Column Name	Column Description
Adjustment Information	Indicates the adjustment that is created for the data record using the adjustment upload request.

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Column Name	Column Description
	Note: The data appears in this column only when the following conditions are met: • The adjustment upload request is in the **Completed** status. • An algorithm created using the **C1-ADI-INFO** algorithm type is attached to the **Adjustment Information** system event in the **Algorithms** tab of the **Installation Options - Framework** screen. It has a link. On clicking the link, the **Adjustment** screen appears where you can view the details of the respective adjustment.
Account Identifier Type / Account Identifier	Indicates the account identifier type and account identifier concatenated by the **Forward Slash** (/) symbol.
Account ID	Indicates the account for which the adjustment must be created.
Adjustment Match Value	Indicates the match type and match value concatenated by the **Colon** (:) symbol.
Adjustment Type	Indicates the adjustment type using which the adjustment must be created.
Adjustment Amount	Displays the adjustment amount.
Comments	Displays additional information about the adjustment.
Bill ID	Indicates the bill against which the adjustment must be created.
Arrears Date	Displays the date from when the adjustment's financial transaction should start aging.
Char Type 1, Char Type 2, ..., Char Type 5	Indicates the characteristic type.
Char Value 1, Char Value 2, ..., Char Value 5	Displays the value for the characteristic type.

Adjustment Upload Request - Log

The **Log** tab contains the following zone:

- Upload Request Log on page 1445

Upload Request Log

The **Upload Request Log** zone lists the complete trail of actions performed on the adjustment upload request. It contains the following columns:

Column Name	Column Description
Date/Time	Displays the date and time when the action was performed on the adjustment upload request.
Details	Displays the details about the action performed on the adjustment upload request.
User	Indicates the user who has performed the action on the adjustment upload request.
Log Type	Indicates the type of log.
Related Object	Indicates the object or entity which is created when the action is performed on the adjustment upload request.

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Column Name	Column Description
	Note: At present, no data appears in this column. The implementation team can build the custom logic to meet the business requirements.
Status Reason	Indicates the reason why the adjustment upload request is rejected or canceled.

Note: You can manually add a log entry for the adjustment upload request by clicking the **Add Log Entry** link in the upper right corner of the **Upload Request Log** zone.

Related Topics

For more information on...	See...
How to view the log of an adjustment upload request	Viewing the Log of an Adjustment Upload Request on page 1452
How to add a log entry for an adjustment upload request	Adding a Log Entry for an Adjustment Upload Request on page 1452

Canceling an Adjustment Upload Request

There might be situations when an incorrect adjustment data file is uploaded in the system. In such case, the system provides you with the ability to cancel the adjustment upload request. However, note that you can cancel an adjustment upload request only when it is in the **Pending** status.

Prerequisites

To cancel an adjustment upload request, you should have:

- Reasons defined for the **Cancelled** status of the **C1-ADJUPLD** business object in the **Status Reason** screen.

Procedure

To cancel an adjustment upload request:

1. Search for the adjustment upload request in the **Adjustment Upload Request** screen.
2. In the **Search Results** section, click the link in the **Upload Request Information** column corresponding to the *a*djustment upload request that you want to cancel.

   The **Adjustment Upload Request** screen appears.
3. Ensure that the **Main** tab is selected.
4. Click the **Cancel File** button in the **Adjustment Upload Request** zone.

   The **Cancellation Information** window appears. It contains the following field:

Field Name	Field Description	Mandatory (Yes or No)
Cancellation Reason	Used to indicate the reason why you want to cancel the adjustment upload request.	Yes
	Note: The list includes only those reasons which are defined for the **Cancelled** status of the **C1-ADJUPLD** business object through the **Status Reason** screen.	

Note: The **Cancel File** button appears when the adjustment upload request is in the **Pending** status.

5. Select the reason for canceling the adjustment upload request from the **Cancellation Reason** list.

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6. Click **Save**.
   The status of the adjustment upload request is changed to **Cancelled**.

Related Topics

For more information on...	See...
How to search for an adjustment upload request	Searching for an Adjustment Upload Request on page 1438
Adjustment Upload Request screen	Adjustment Upload Request (Used for Viewing) on page 1442
Adjustment Upload Request zone	Adjustment Upload Request on page 1442

Creating Adjustments for an Adjustment Upload Request

Prerequisites

To create adjustments for an adjustment upload request, you should have:

- An algorithm created using the **C1-ADI-INFO** algorithm type attached to the **Adjustment Information** system event in the **Algorithms** tab of the **Installation Options - Framework** screen.

Procedure

To create adjustments for an adjustment upload request:

1. Search for the adjustment upload request in the **Adjustment Upload Request** screen.
2. In the **Search Results** section, click the link in the **Upload Request Information** column corresponding to the *a*djustment upload request for which you want to create adjustments.

   The **Adjustment Upload Request** screen appears.
3. Ensure that the **Main** tab is selected.
4. Click the **Create Adjustment** button in the **Adjustment Upload Request** zone.

   The system behaves in the following manner:

If...	Then...
The number of records in the adjustment data file does not exceed the online record process limit specified in the **C1-UPLDEFEVL** algorithm (attached to the **Defer Algorithm** field in the respective adjustment upload request type)	The system creates adjustments in the real time (i.e. immediately). The adjustment information string appears corresponding to each adjustment record in the **Adjustment Data Records** zone and the status of the adjustment upload request is changed to **Completed**.
The number of records in the adjustment data file exceeds the online record process limit specified in the **C1-UPLDEFEVL** algorithm (attached to the **Defer Algorithm** field in the respective adjustment upload request type)	The status of the adjustment upload request is changed to **Deferred**. **Note:** You need to then execute the **Upload Request Periodic Monitor** (**C1-UPLRQ**) batch. It considers the adjustment upload requests which are in the **Deferred** status and then creates the adjustment for each adjustment record. If the adjustments are successfully created, the status of the adjustment upload request is changed to **Completed**.

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Note:

The **Create Adjustment** button appears when the following conditions are met:

- The adjustment upload request is in the **Pending** status.
- The approval process is not configured for the upload request type using which adjustment upload request is created.

Related Topics

For more information on...	See...
How to search for an adjustment upload request	Searching for an Adjustment Upload Request on page 1438
Adjustment Upload Request screen	Adjustment Upload Request (Used for Viewing) on page 1442
Adjustment Upload Request zone	Adjustment Upload Request on page 1442
Adjustment Data Records zone	Adjustment Data Records on page 1444

Submitting an Adjustment Upload Request for Approval

Procedure

To submit an adjustment upload request for approval:

1. Search for the adjustment upload request in the **Adjustment Upload Request** screen.
2. In the **Search Results** section, click the link in the **Upload Request Information** column corresponding to the *a*djustment upload request that you want to submit for approval.

   The **Adjustment Upload Request** screen appears.
3. Ensure that the **Main** tab is selected.
4. Click the **Submit for Approval** button in the **Adjustment Upload Request** zone.

   The status of the adjustment upload request is changed to **Pending For Approval**. A To Do is created using the To Do type (i.e., **C1-ADJUP**) specified in the **Approval To Do Type** field of the respective adjustment upload request type. It is then assigned to the users with the role specified in the **Approval To Do Role** field of the respective adjustment upload request type. In addition, a log entry is created for the adjustment upload request when the To Do is created for the approver.

Note:

The **Submit for Approval** button appears when the following conditions are met:

- The adjustment upload request is in the **Pending** status.
- The approval process is configured for the upload request type using which adjustment upload request is created.

Related Topics

For more information on...	See...
How to search for an adjustment upload request	Searching for an Adjustment Upload Request on page 1438
Adjustment Upload Request screen	Adjustment Upload Request (Used for Viewing) on page 1442
Adjustment Upload Request zone	Adjustment Upload Request on page 1442

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Approving an Adjustment Upload Request

You can view the adjustment upload requests which are pending for approval from the **Adjustment Upload Request** screen. The approver can review, and accordingly approve or reject the adjustment upload request based on the observations.

Note: The system will not allow you to approve or reject an adjustment upload request submitted by you.

To approve an adjustment upload request, you should have:

- Required approval To Do role assigned in the system
- An algorithm created using the **C1-ADI-INFO** algorithm type attached to the **Adjustment Information** system event in the **Algorithms** tab of the **Installation Options - Framework** screen.

Procedure

To approve an adjustment upload request:

1. Do either of the following:

If you want to...	Then...
Review an adjustment upload request through the Adjustment Upload Request screen	**a.** Search for the adjustment upload request in the **Adjustment Upload Request** screen. **b.** In the **Search Results** section, click the link in the **Upload Request Information** column corresponding to the *a*djustment upload request that you want to review.
Review an adjustment upload request from the To Do List screen	**a.** Click the **Menu** link in the **Application** toolbar. A list appears. **b.** From the **Main** menu, select **To Do** and then click **To Do List**. The **To Do List** screen appears. **c.** Click the **Search** (🔍) icon corresponding to the **To Do Type** field. The **To Do Type for User Search** window appears. **d.** Enter the required To Do type in the **To Do Type** field. **e.** Click the **Search** button corresponding to the **To Do Type** field. The **To Do List** screen appears. **f.** Select the **Open** option from the **Filter by** list to view all the unassigned To Dos. **g.** Click the link in the **Message** column corresponding to the To Do of the adjustment upload request that you want to review.

   The **Adjustment Upload Request** screen appears.
2. Review the details in the **Adjustment Upload Request** screen.
3. If the information in the adjustment upload request is accurate, click the **Approve** button in the **Adjustment Upload Request** zone.

   The system behaves in the following manner:

If...	Then...
The number of records in the adjustment data file does not exceed the online record process limit specified in	The system creates adjustments in the real time (i.e. immediately). The adjustment information string

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If...	Then...
the **C1-UPLDEFEVL** algorithm (attached to the **Defer Algorithm** field in the respective adjustment upload request type)	appears corresponding to each adjustment record in the **Adjustment Data Records** zone and the status of the adjustment upload request is changed to **Completed**.
The number of records in the adjustment data file exceeds the online record process limit specified in the **C1-UPLDEFEVL** algorithm (attached to the **Defer Algorithm** field in the respective adjustment upload request type)	The status of the adjustment upload request is changed to **Deferred**. **Note:** You need to then execute the **Upload Request Periodic Monitor** (**C1-UPLRQ**) batch. It considers the adjustment upload requests which are in the **Deferred** status and then creates the adjustment for each adjustment record. If the adjustments are successfully created, the status of the adjustment upload request is changed to **Completed**.

Note:

The **Approve** button appears when the following conditions are met:

- The adjustment upload request is in the **Pending For Approval** status.
- A user with the approval To Do role is reviewing the adjustment upload request.

Related Topics

For more information on...	See...
How to search for an adjustment upload request	Searching for an Adjustment Upload Request on page 1438
Adjustment Upload Request screen	Adjustment Upload Request (Used for Viewing) on page 1442
Adjustment Upload Request zone	Adjustment Upload Request on page 1442

Rejecting an Adjustment Upload Request

Prerequisites

To reject an adjustment upload request, you should have:

- Required approval To Do role assigned in the system
- Reasons defined for the **Rejected** status of the **C1-ADJUPLD** business object in the **Status Reason** screen

Note: The system will not allow you to approve or reject an adjustment upload request submitted by you.

Procedure

To reject an adjustment upload request:

1. Do either of the following:

If you want to...	Then...
Review an adjustment upload request through the Adjustment Upload Request screen	**a.** Search for the adjustment upload request in the **Adjustment Upload Request** screen.

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If you want to...	Then...
	b. In the **Search Results** section, click the link in the **Upload Request Information** column corresponding to the *a*djustment upload request that you want to review.
Review an adjustment upload request from the To Do List screen	**a.** Click the **Menu** link in the **Application** toolbar. A list appears. **b.** From the **Main** menu, select **To Do** and then click **To Do List**. The **To Do List** screen appears. **c.** Click the **Search** (🔍) icon corresponding to the **To Do Type** field. The **To Do Type for User Search** window appears. **d.** Enter the required To Do type in the **To Do Type** field. **e.** Click the **Search** button corresponding to the **To Do Type** field. The **To Do List** screen appears. **f.** Select the **Open** option from the **Filter by** list to view all the unassigned To Dos. **g.** Click the link in the **Message** column corresponding to the To Do of the adjustment upload request that you want to review.

The **Adjustment Upload Request** screen appears.

2. Review the details in the **Adjustment Upload Request** screen.
3. If the information in the adjustment upload request is incorrect, click the **Reject** button in the **Adjustment Upload Request** zone.

   The **Rejection Information** window appears. It contains the following field:

Field Name	Field Description	Mandatory (Yes or No)
Rejection Reason	Used to indicate the reason why you want to reject the adjustment upload request. **Note:** The list includes only those reasons which are defined for the **Rejected** status of the **C1-ADJUPLD** business object through the **Status Reason** screen.	Yes

Note:

The **Reject** button appears when the following conditions are met:

- The adjustment upload request is in the **Pending For Approval** status.
- A user with the approval To Do role is reviewing the adjustment upload request.

4. Select the reason for rejecting the adjustment upload request from the **Rejection Reason** list.
5. Click **Save**.
   The status of the adjustment upload request is changed to **Rejected**.

Related Topics

For more information on...	See...
How to search for an adjustment upload request	Searching for an Adjustment Upload Request on page 1438

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For more information on...	See...
Adjustment Upload Request screen	Adjustment Upload Request (Used for Viewing) on page 1442
Adjustment Upload Request zone	Adjustment Upload Request on page 1442

Viewing the Log of an Adjustment Upload Request

Procedure

To view the log of an adjustment upload request:

1. Search for the adjustment upload request in the **Adjustment Upload Request** screen.
2. In the **Search Results** section, click the link in the **Upload Request Information** column corresponding to the *a*djustment upload request whose details you want to view.

   The **Adjustment Upload Request** screen appears.
3. Click the **Log** tab.
   The **Log** tab appears.
4. View the complete trail of actions performed on the adjustment upload request in the **Upload Request Log** zone.

Related Topics

For more information on...	See...
How to search for an adjustment upload request	Searching for an Adjustment Upload Request on page 1438
Adjustment Upload Request screen	Adjustment Upload Request (Used for Viewing) on page 1442
Upload Request Log zone	Upload Request Log on page 1445
How to add a log entry for an adjustment upload request	Adding a Log Entry for an Adjustment Upload Request on page 1452

Adding a Log Entry for an Adjustment Upload Request

Procedure

To add a log entry for an adjustment upload request:

1. Search for the adjustment upload request in the **Adjustment Upload Request** screen.
2. In the **Search Results** section, click the link in the **Upload Request Information** column corresponding to the *a*djustment upload request for which you want to add a log entry.

   The **Adjustment Upload Request** screen appears.
3. Click the **Log** tab.
   The **Log** tab appears.
4. Click the **Add Log Entry** link in the upper right corner of the **Upload Request Log** zone.

   The **Add Request Log** window appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Request Information	Displays information about the adjustment upload request.	Not applicable

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Field Name	Field Description	Mandatory (Yes or No)
Log Details	Used to specify additional comments for the adjustment upload request. **Note:** You can resize the text box depending on your requirement by clicking the **Resize Handle** (⇲) icon at the bottom right corner of the text box.	Yes

5. Enter the comments in the **Log Details** field.
6. Click **Save**.
   The log entry is added in the **Upload Request Log** zone.

Related Topics

For more information on...	See...
How to search for an adjustment upload request	Searching for an Adjustment Upload Request on page 1438
Adjustment Upload Request screen	Adjustment Upload Request (Used for Viewing) on page 1442
Upload Request Log zone	Upload Request Log on page 1445

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Chapter 22

Payment Request

Topics:

- Prerequisites
- Payment Creation Request (Without Approval) Status Transition
- Payment Creation Request (With Approval) Status Transition
- Payment Transfer Request (Without Approval) Status Transition
- Payment Transfer Request (With Approval) Status Transition
- Algorithms Used in C1-PaymentRequest
- Algorithms Used in C1-PaymentTransferRequest
- Payment Request Type
- Payment Request (Used for Searching)
- Payment Request (Used for Viewing)
- Payment Event Summary

Oracle Revenue Management and Billing facilitates you to create and transfer payments through a payment request. While creating a payment creation or transfer request, you need to specify the payment request type using which you want to create the payment request. It is the payment request type which helps the system to determine:

- Whether to create payment transfer or payment creation request
- Whether payment events and payments must be created in real time (i.e. immediately) or in the deferred mode
- Whether payment creation or transfer instructions must be approved by the approver before freezing the payments

While creating a payment creation request, you need to specify the tender amount and match type details. However, while creating a payment transfer request, you need to specify the transfer amount and match type details. The **Payment Request** feature supports the following match types :

- By Bill Regular (Match Entity: Account)
- By Bill (Match Entity: Bill)
- By Bill Weighted (Match Entity: Account)
- By Bill Segments (Match Entity: Account)
- By Suspense Contract (Match Entity: Account)
- By Settlement ID (Match Entity: Account)

You can specify multiple match types along with the entity (such as account or bill) in the payment request. Depending on the match type and match entity selected, the entities (such as unpaid bills, bill segments, or contracts) of the account are considered against which you can match the tender or transfer (payment) amount. Once you update the payment amount against the required entities, you can distribute the tender or payment amount.

On distributing the tender amount, the payment event, payments, payment segments, and payment tender are created. The payments are created in the **Freezable** status. If any error occurs while creating a payment, the payment is created in the **Error** status. If all payments of a payment event are in the **Freezable** status, the status of the payment event is set to **Balanced**. However, if any payment of a payment event is in the **Error** status, the status of the payment event is set to **Unbalanced**. On distributing the payment amount (during transfer), the new payments are created in the **Freezable** status. If any error occurs while creating a new payment, the payment is created in the **Error** status. The status of the payment event is set to **Unbalanced**. The old payments in the payment event that you want to transfer remains in the **Frozen** or **Error** status.

The system allows you to view the pay segments of a payment and edit the pay segment amount, if required. You can edit the pay segment amount before submitting the payment request for approval or before freezing the payments.

If the approval is not required for the payment request, you can directly freeze the payments created through the payment request. However, if the approval is required for the payment request, you need to submit the payment request for approval. Based on the observations, the approver might approve or reject the payment request. On approving a payment creation request or freezing the payments, the status of the payments is changed from **Freezable** to **Frozen**. However, on approving a payment transfer request or freezing the payments, the system does the following:

- Changes the status of the old payments which are in the **Frozen** status to **Cancelled**
- Deletes the old payments which are in the **Error** status
- Changes the status of the new payments which are in the **Freezable** status to **Frozen**
- Changes the status of the payment event to **Balanced** when there are no payments in the **Error** status

On rejecting a payment creation request, the payment event, payments, payment segments, and payment tender which are created through the payment creation request are deleted. However, on rejecting a payment transfer request, the new payments which are created through the payment transfer request are deleted.

During the payment request process, a payment creation or transfer request goes through various statuses in its lifecycle. For more information about the payment request statuses, see Payment Creation Request (Without Approval) Status Transition on page 1458 and Payment Creation Request (With Approval) Status Transition on page 1460.

Note that the lifecycle of a payment creation and transfer requests is driven by the respective business object using which the payment creation and transfer requests are created. The **C1-PaymentRequest** and **C1-PaymentTransferRequest** business objects are shipped with the product. The payment request feature explained in this document is articulated based on the lifecycle and logic defined in the **C1-PaymentRequest** and **C1-PaymentTransferRequest** business objects.

For more information on how to setup the payment request process, see Prerequisites on page 1457.

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Prerequisites

To setup the payment request process, you need to do the following:

- Define the following match types:

Match Type	Description	Payment Distribution Override Algorithm	Manual Distribution Algorithm	Entity Type	Match Type Search Zone	Entity Flag
BILLR	By Bill Regular	C1-PDOV-PYBL	C1-MD-BILL	Account	C1_ACCTSRCH	Bill
BILLW	By Bill Weighted	C1-PDOV-WTBS	C1-MD-BILL	Account	C1_ACCTSRCH	Bill
BILL-WO	By Bill Weighted Outstanding Amount	C1-PDOV-WTOA		Account	C1_ACCT_SRCH	Bill
BILLSEG	By Bill Segment	C1-PDOV-PYBS	C1-MD-BSEG	Account	C1_ACCTSRCH	Bill Segment
BYSATY	By Suspense Contract	C1-PDOV-SATY	C1-MD-ONSA	Account	C1_ACCTSRCH	Contract
SETT-ID	By Settlement ID	C1-PDOV-PYSL	C1-MD-SID	Account	C1_ACCTSRCH	Settlement
BYBILL	By Bill	C1-PDOV-PYBL or C1-PDOV-WTBS	C1-MDBYBILL	Bill	CI_BILL	Bill
BILL-BS	By Bill - Pay By Bill Segment Oldest	C1-PDOV-BSDT		Account	C1_ACCT_SRCH	Bill

Note: The **C1-PDOV-BSDT** algorithm for the bill match type BILL-BS is used to distribute the amount among the bill segments of the bill in the order of bill segment start date.

Note: The **C1-PDOV-WTOA** algorithm for the bill match type BILL-WOA performs the bill weighted calculation based on the unpaid amount on the bill segment.

- Create a defer algorithm using the **C1-PAY-COUNT** algorithm type.
- Define the required payment request types in the system.
- Define the required characteristic types where the characteristic entity is set to **Payment Request Type**.
- Define the required characteristic types where the characteristic entity is set to **Payment Tender**.
- Define rejected status reasons for the **C1-PaymentRequest** business object.
- Define rejected status reasons for the **C1-PaymentTransferRequest** business object.
- Define payment cancelation or transfer reasons through the **Payment Cancel Reason** screen.
- Assign the **C1-PAYRQ** To Do type to a To Do role whose users must receive To Do generated while submitting a payment request for approval.
- Set the **Payment Portal Configuration (C1-PAYPORTAL)** feature configuration.

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- Set the **Payment Request-Sort Distribution data (C1-PYREQSRT)** feature configuration.
- Set the batch control type of the **Payment Request Periodic Monitor (C1-PAYRQ)** batch to **Timed** and define the following attributes:
  - Time Interval
  - Timer Active
  - User ID
  - Batch Language
  - Email Address

Related Topics

For more information on...	See...
How to set the C1-PAYPORTAL feature configuration	Setting the C1-PAYPORTAL Feature Configuration on page 4457
How to set the C1-PYREQSRT feature configuration	Setting the C1-PYREQSRT Feature Configuration on page 4465

Payment Creation Request (Without Approval) Status Transition

The following figure graphically indicates how a payment creation or transfer request moves from one status to another when the approval workflow is off:

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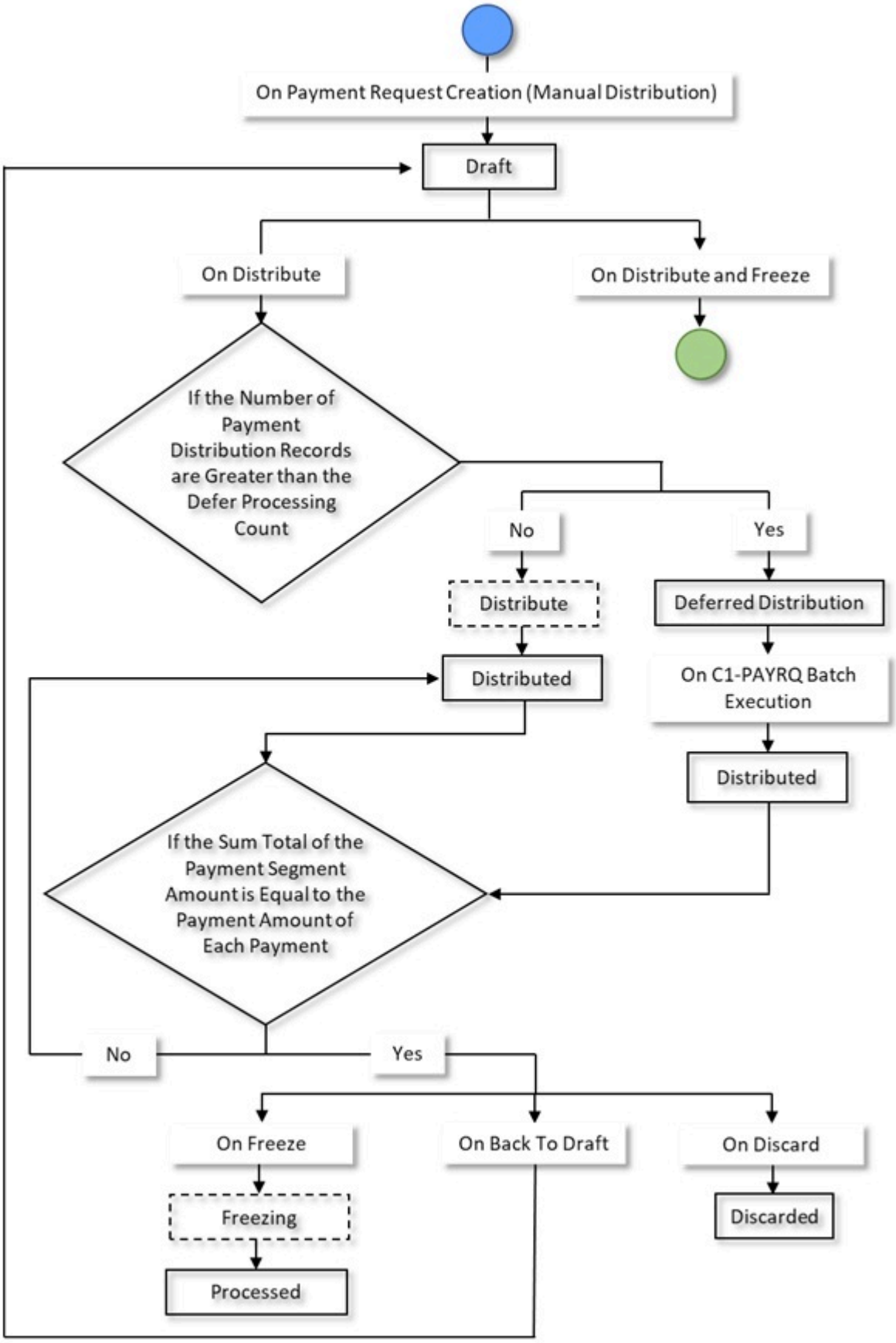

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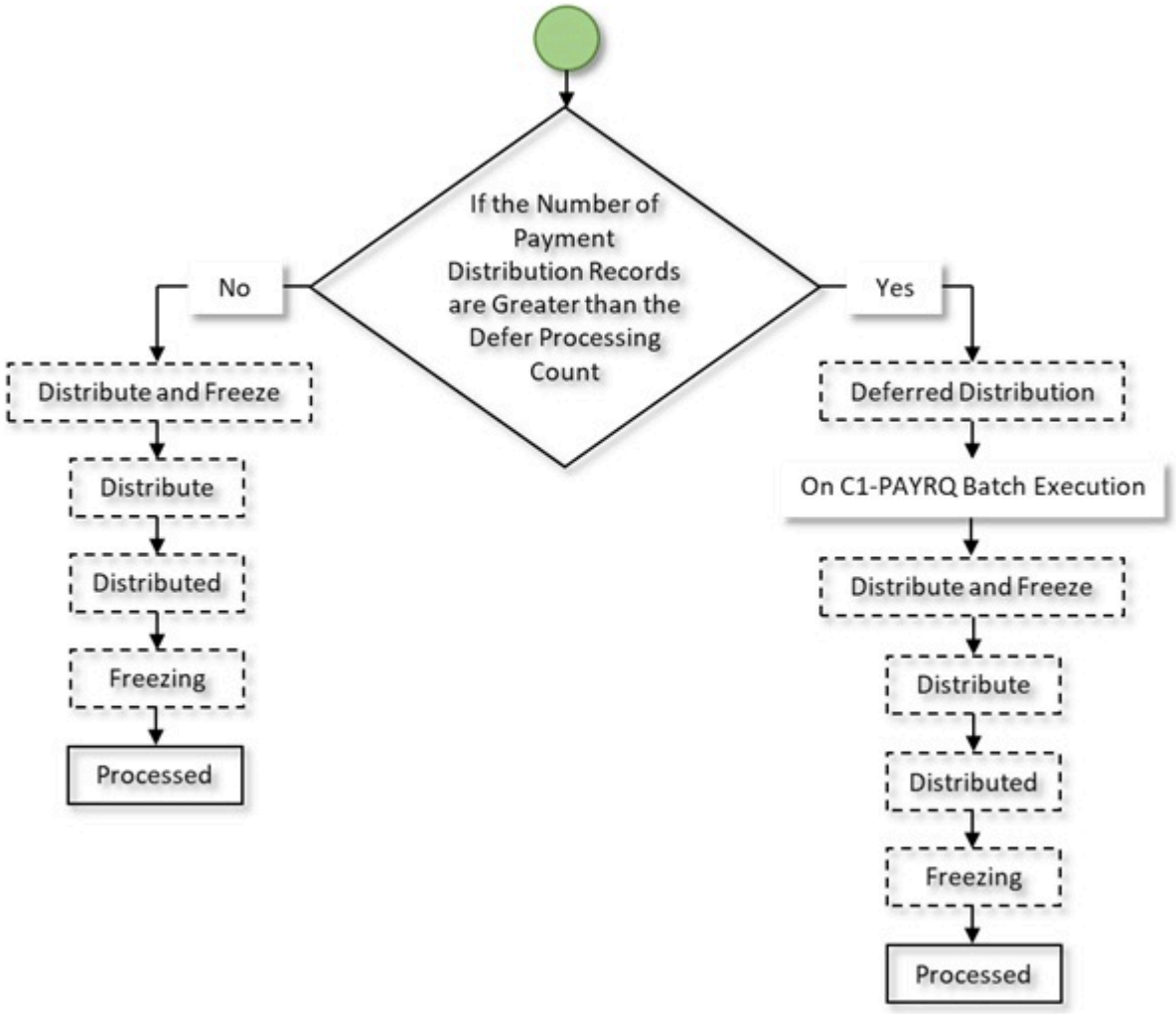
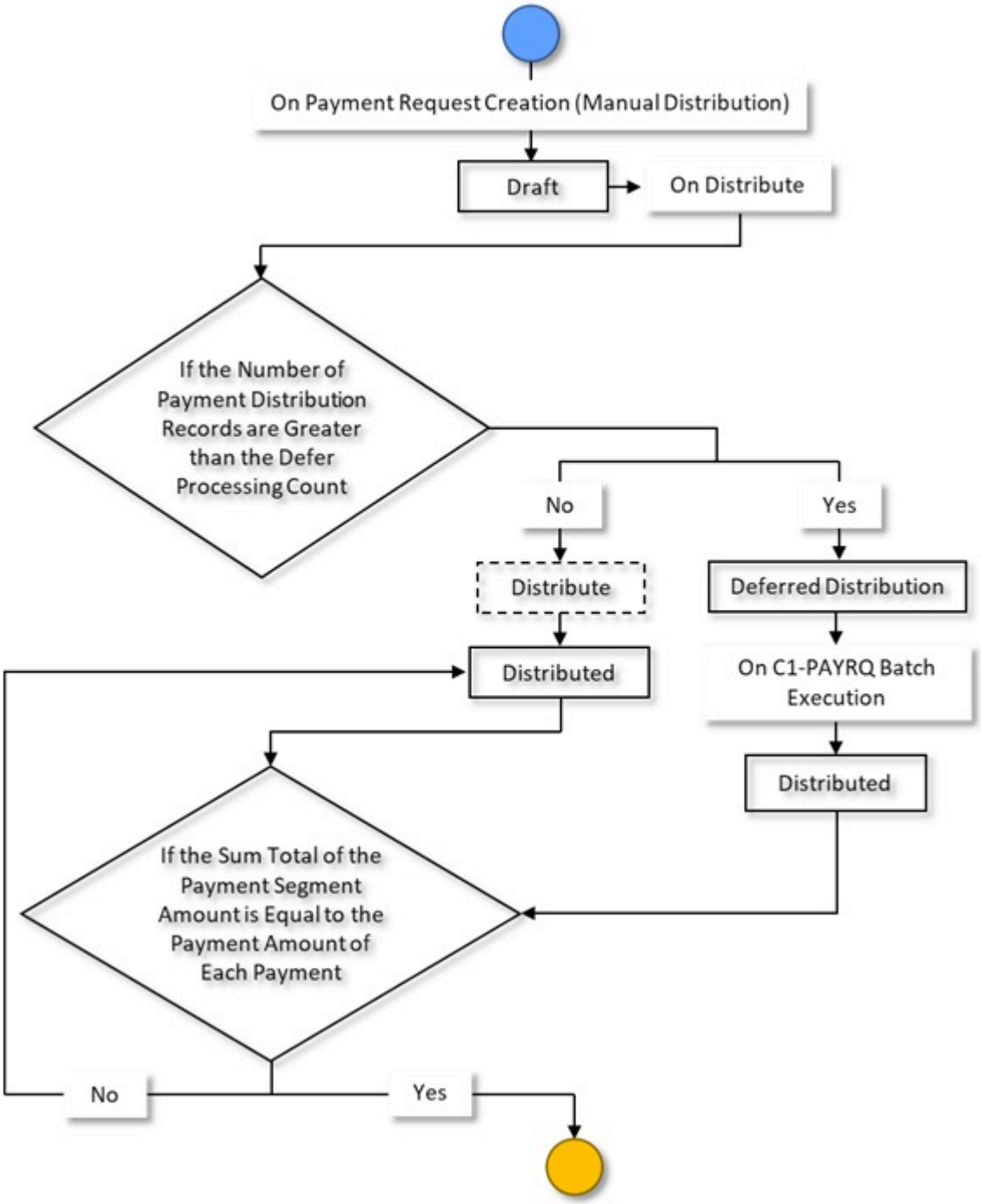


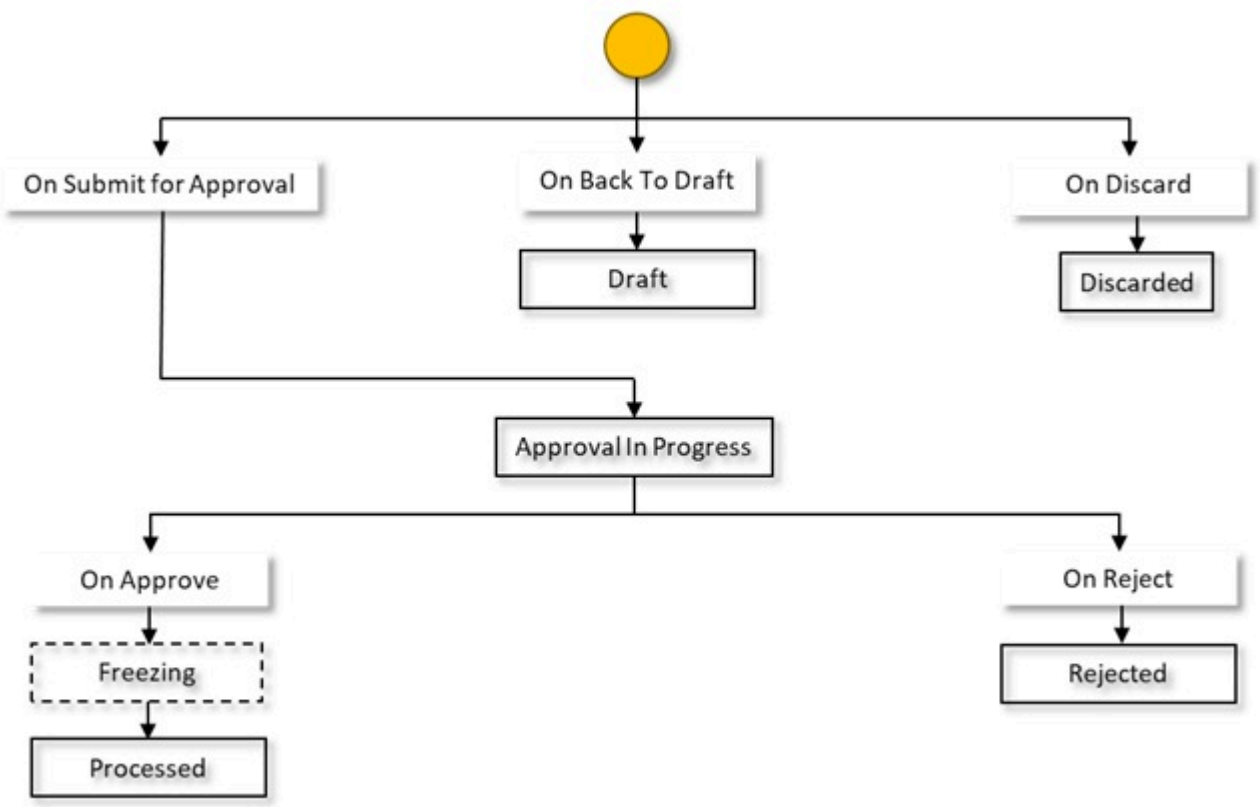
Payment Creation Request (With Approval) Status Transition

The following figure graphically indicates how a payment creation or transfer request moves from one status to another when approval workflow is on:

Copyright © 2026, Oracle and/or its affiliates.



Copyright © 2026, Oracle and/or its affiliates.



Payment Transfer Request (Without Approval) Status Transition

The following figure graphically indicates how a payment transfer request moves from one status to another when the approval workflow is off:

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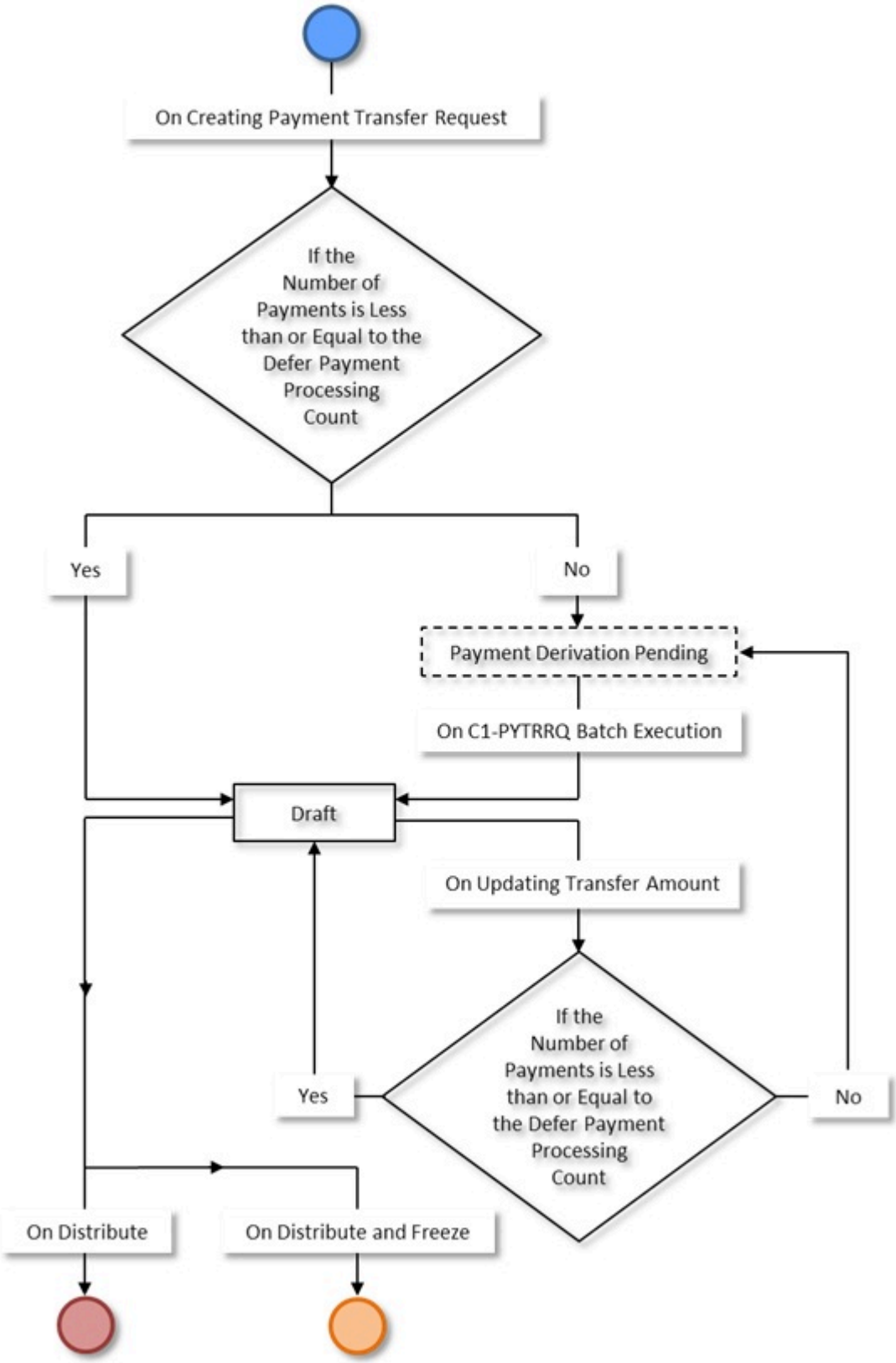
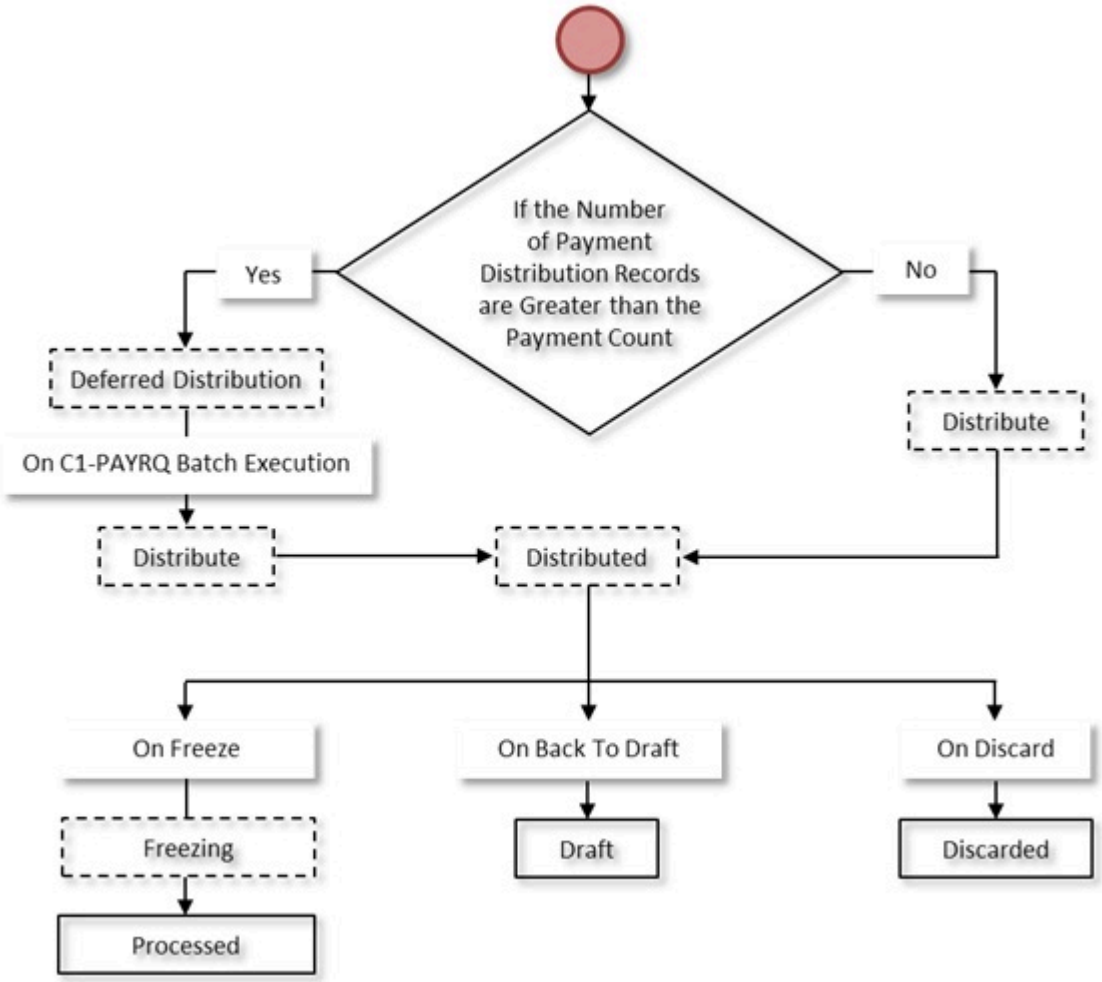


Copyright © 2026, Oracle and/or its affiliates.



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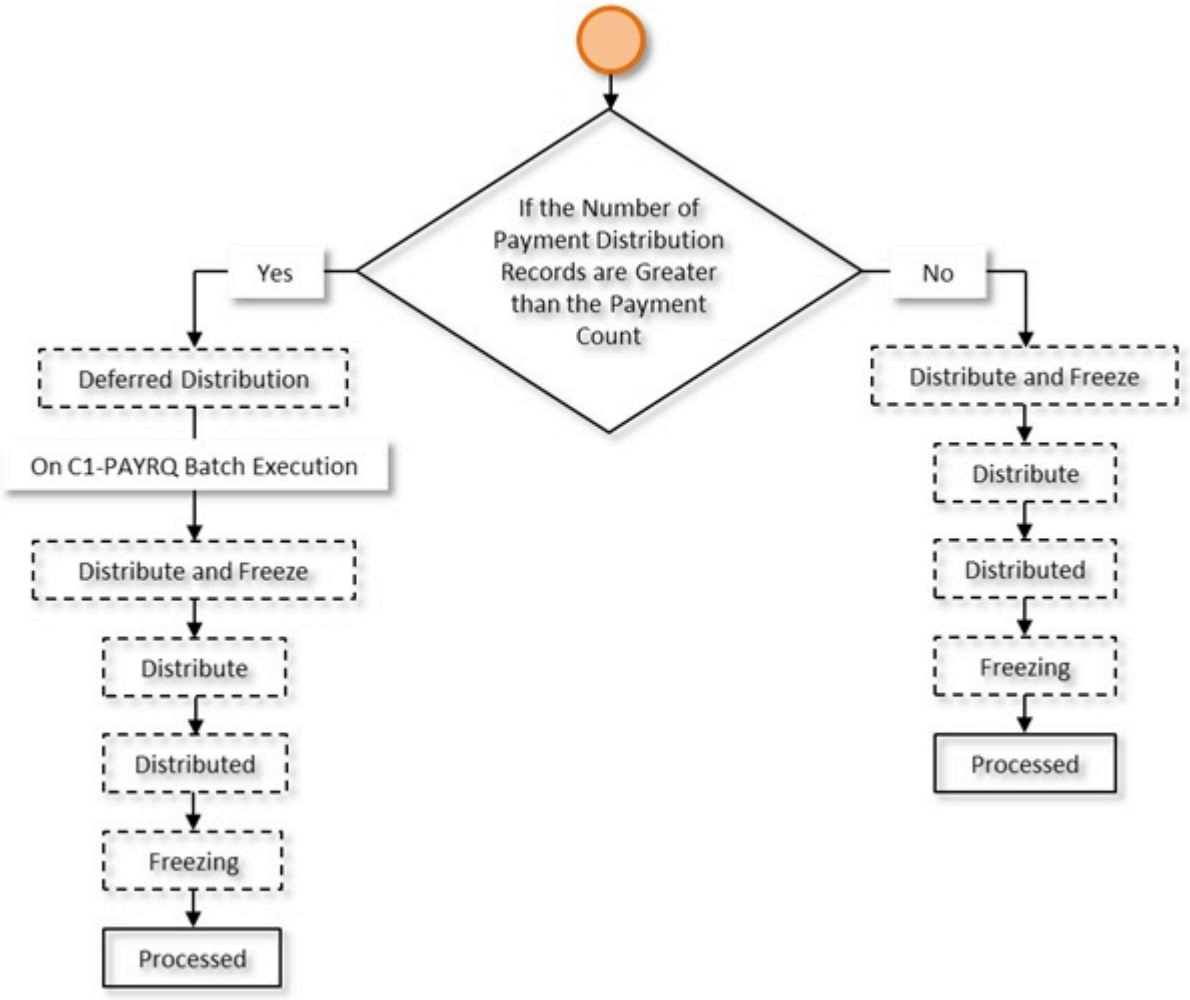

Payment Transfer Request (With Approval) Status Transition

The following figure graphically indicates how a payment transfer request moves from one status to another when the approval workflow is on:

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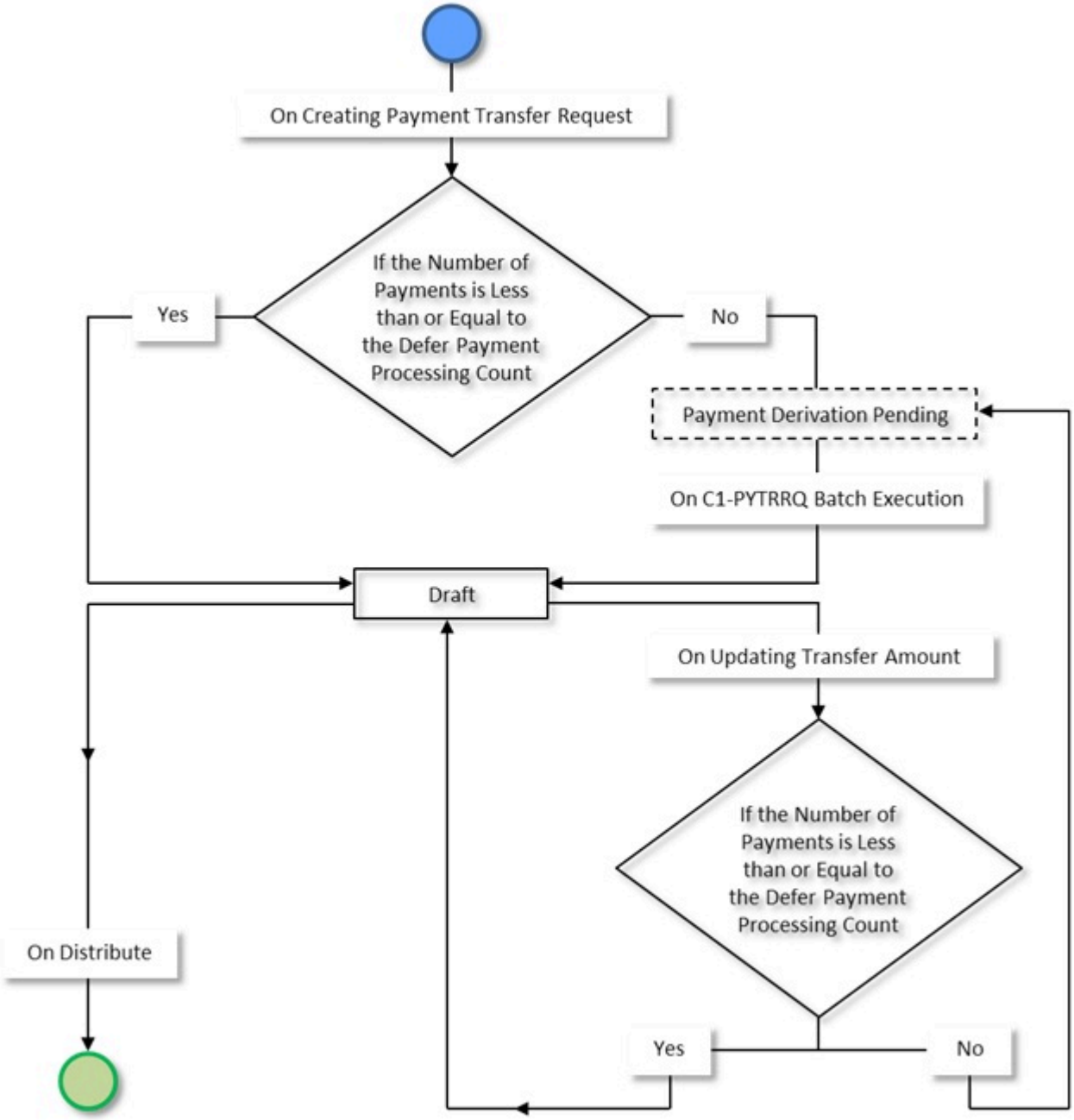
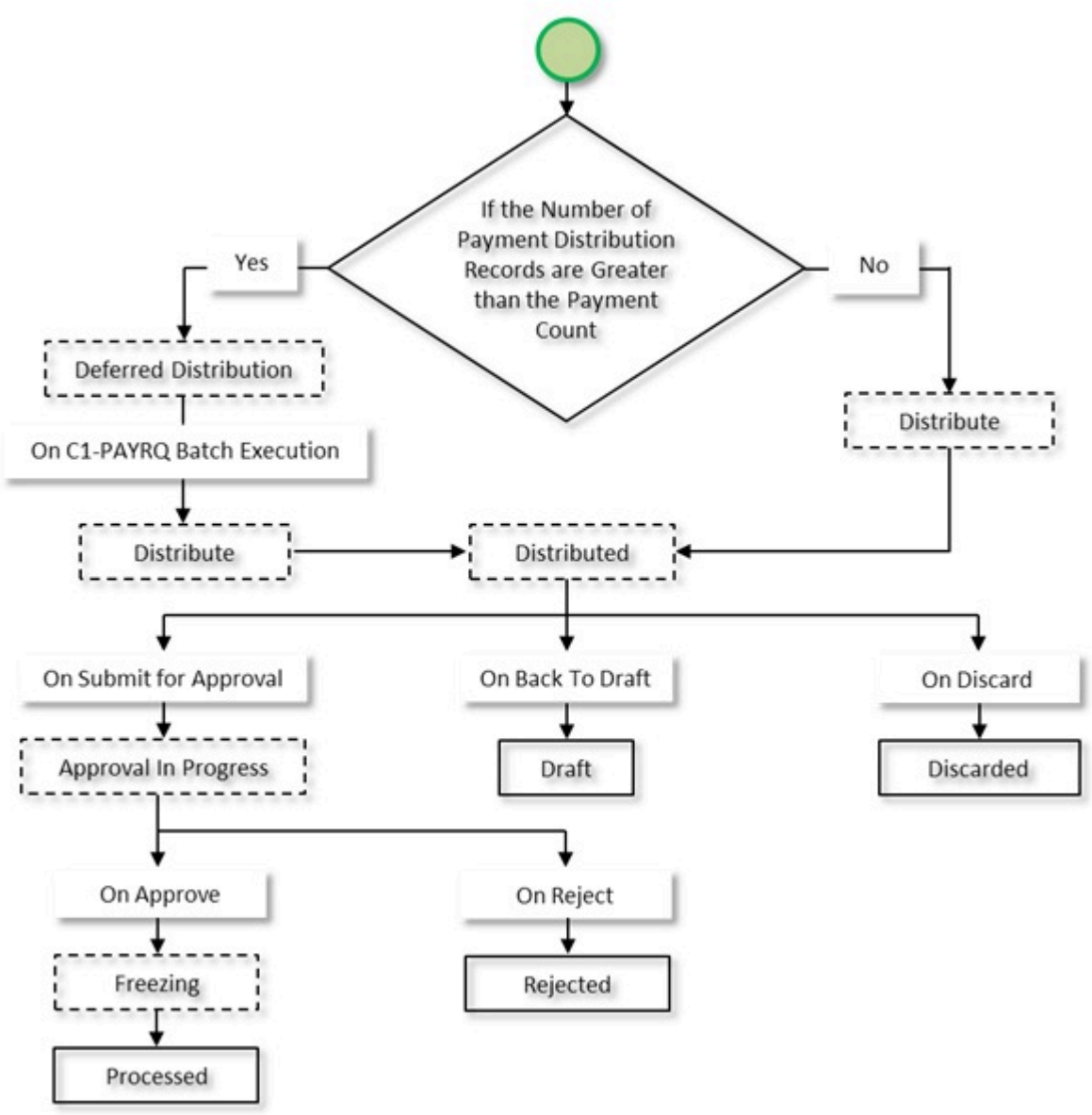


Copyright © 2026, Oracle and/or its affiliates.



Algorithms Used in C1-PaymentRequest

The following table lists the algorithms which are attached to the **C1-PaymentRequest** business object:

System Event	Algorithm	Algorithm Type	Description
Information	C1-PAYRQ-INF	C1-PAYRQ-INF	Refer to C1-PAYRQ-INF on page 1469
Post-Processing	C1-PAYREQPOS	C1-PAYREQPOS	Refer to C1-PAYREQPOS on page 1469
Validation	C1-PAYREQVAL	C1-PAYREQVAL	Refer to C1-PAYREQVAL on page 1469

The following table lists the algorithms which are used in the lifecycle of the **C1-PaymentRequest** business object:

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Status	System Event	Algorithm	Algorithm Type	Description
Draft	Enter	C1-PAY-DFT	C1-PAY-DFT	Refer to C1-PAY-DFT on page 1469
	Exit	C1-PAYDFTEXT	C1-PAYDFTEXT	Refer to C1-PAYDFTEXT on page 1469
Approval In Progress	Enter	C1-PAY-PFA	C1-PAY-PFA	Refer to C1-PAY-PFA on page 1469
	Exit	C1-PAYPFAEXT	C1-PAYPFAEXT	Refer to C1-PAYPFAEXT on page 1469
	Exit	F1-TODOCOMPL	F1-TODOCOMPL	Refer to F1-TODOCOMPL on page 1469
Approved	Enter	C1-PAY-APP	C1-PAY-APP	Refer to C1-PAY-APP on page 1470
Distribute	Enter	C1-PAY-DIST	C1-PAY-DIST	Refer to C1-PAY-DIST on page 1470
Deferred Distribution	Monitor	C1-PAY-MONT	C1-PAY-MONT	Refer to C1-PAY-MONT on page 1470
Distributed	Enter	C1-PAYCREATE	C1-PAYCREATE	Refer to C1-PAYCREATE on page 1470
	Exit	C1-FRZ-VALID	C1-FRZ-VALID	Refer to C1-FRZ-VALID on page 1470
	Exit	F1-TODOCOMPL	F1-TODOCOMPL	Refer to F1-TODOCOMPL on page 1469
Freezing	Enter	C1-PAY-V-FRZ	C1-PAY-V-FRZ	Refer to C1-PAY-V-FRZ on page 1470
	Enter	C1-PAY-FRZ	C1-PAY-FRZ	Refer to C1-PAY-FRZ on page 1470
Processed	-	-	-	-
Rejected	Enter	C1-PAY-RJT	C1-PAY-RJT	Refer to C1-PAY-RJT on page 1471
Discarded	Enter	C1-PAY-RJT	C1-PAY-RJT	Refer to C1-PAY-RJT on page 1471
Distribute And Freeze	Enter	C1-ISFREEZE	C1-ISFREEZE	Refer to C1-ISFREEZE on page 1471

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C1-PAYRQ-INF

This algorithm generates the payment request information string which appears throughout the application. This algorithm concatenates the following fields:

- Payment Request Type Description
- Payment Request Status Description
- Payment Request ID

C1-PAYREQPOS

This algorithm invokes the manual distribution algorithm of the match types that are newly added while editing a payment request. It also deletes the respective match type entities from the **C1_PAY_DISTRIBUTION** table when you remove a match type while editing a payment request.

C1-PAYREQVAL

This algorithm checks whether the mandatory data (such as payment date, payor account, tender type, tender amount, currency, match type, and match entity) is specified while creating a payment request. It also checks whether auto pay source, auto pay route type, and account number are specified when you select a tender type where the **Generate Auto Pay** option is selected. This algorithm is triggered when you click the **Manual Distribution** button.

Note: You do not specify the tender and auto pay details while creating a payment transfer request.

C1-PAY-DFT

This algorithm invokes the manual distribution algorithm of the match types that you have selected while creating a payment request.

C1-PAYDFTEXT

This algorithm checks whether the sum of the distributed payment amount is equal to the tender or transfer amount. This algorithm is triggered when you click the **Distribute** button.

C1-PAY-PFA

This algorithm creates the To Do using the To Do type specified in the payment request type using which the payment request is created. The To Do is sent to the users with the approval To Do role specified in the payment request type.

C1-PAYPFAEXT

This algorithm checks whether the approver is associated with the approval To Do role specified in the payment request type. It does not allow the submitter to approve or reject the payment request.

F1-TODOCOMPL

This algorithm completes the To Do entries that are linked to an object when the object exits the given status. It finds and completes all open To Do entries where the business object's primary key is defined as a drill key. However, if the

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Exclude To Do Entries From Auto Completion (**F1-EXLTD**) characteristic is set to **Y** for a To Do type, the system does not automatically complete the respective To Do entry.

This algorithm contains the following parameter:

- **'Do Not Complete To Do Type' Char Type** – Used to specify the characteristic type that indicates whether the To Do entries should be automatically completed or not.

Note: The **F1-EXLTD** characteristic type is shipped with the product. You can either use the **F1-EXLTD** characteristic type or a custom characteristic type, if required. Note that you must specify a predefined characteristic type where the characteristic entity is set to **To Do Type** and the predefined values are set to **Y** or **N**.

C1-PAY-APP

This algorithm changes the status of the payment request to **Freezing** when the approver clicks the **Approve** button.

C1-PAY-DIST

This algorithm invokes the defer algorithm specified in the payment request type using which the payment request is created. The defer algorithm checks whether the tender or transfer amount must be distributed in the real time (i.e. immediately) or in the deferred mode. If the tender or transfer amount must be distributed in the real time, the status of the payment request is changed to **Distributed**. However., if the tender or transfer amount must be distributed in the deferred mode, the status of the payment request is changed to **Deferred Distribution**.

C1-PAY-MONT

This algorithm is invoked from the **Payment Request Periodic Monitor (C1-PAYRQ)** batch. It changes the status of the payment request from **Deferred Distribution** to **Distributed**.

C1-PAYCREATE

This algorithm creates the payment event, payments, payment segments, and payment tender. A payment is created for each record in the **C1_PAY_DISTRIBUTION** table where the payment amount is greater than or less than zero. The status of the payments is set to **Freezable**. If any error occurs while creating a payment, the status of the payment is set to **Error**. The payment event ID is updated corresponding to the payment request in the **C1_PAY_REQ** table. Finally, the status of the payment request is changed to **Distributed**.

C1-FRZ-VALID

This algorithm is triggered when you click the **Submit for Approval** or **Freeze** button. It checks whether the sum of payment segment amount is equal to the payment amount for each payment.

C1-PAY-V-FRZ

This algorithm validates whether payment already exists on the entity. It checks the unpaid amount of the entity.

C1-PAY-FRZ

This algorithm fetches the payment event created through the payment request. If you are freezing the payments of a payment creation request, this algorithm does the following:

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- Changes the status of the payments which are in the **Freezable** status to **Frozen**.
- Changes the status of the payment event to **Balanced** when there are no payments in the **Error** status.

However, if you are freezing the payments of a payment transfer request, this algorithm does the following:

- Changes the status of the old payments which are in the **Frozen** status to **Cancelled**.
- Deletes the old payments which are in the **Error** status.
- Changes the status of the new payments which are in the **Freezable** status to **Frozen**.
- Changes the status of the payment event to **Balanced** when there are no payments in the **Error** status.

C1-PAY-RJT

This algorithm is triggered when the approver clicks the **Reject** button. If you are rejecting a payment creation request, this algorithm deletes the payment event, payments, payment segments, and payment tender which are created through the payment creation request. However, if you are rejecting a payment transfer request, this algorithm deletes the new payments which are created through the payment transfer request.

C1-ISFREEZE

This algorithm invokes the distribute algorithm and set Flag in the payment request clob.

Algorithms Used in C1-PaymentTransferRequest

The following table lists the algorithms which are attached to the **C1-PaymentTransferRequest** business object:

System Event	Algorithm	Algorithm Type	Description
Information	C1-PAYRQ-INF	C1-PAYRQ-INF	Refer to C1-PAYRQ-INF on page 1469
Post-Processing	C1-PAYREQPOS	C1-PAYREQPOS	Refer to C1-PAYREQPOS on page 1469
Validation	C1-PAYREQVAL	C1-PAYREQVAL	Refer to C1-PAYREQVAL on page 1469

The following table lists the algorithms which are used in the lifecycle of the **C1-PaymentTransferRequest** business object:

Status	System Event	Algorithm	Algorithm Type	Description
Draft	Enter	C1-PYTRDF	C1-PYTRDF	Refer to C1-PYTRDF on page 1472
	Enter	C1-PAY-DFT	C1-PAY-DFT	Refer to C1-PAY-DFT on page 1469
	Exit	C1-PAYDFTEXT	C1-PAYDFTEXT	Refer to C1-PAYDFTEXT on page 1469
Payment Derivation Pending	Monitor	C1-PYTR-MONT	C1-PYTR-MONT	Refer to C1-PYTR-MONT on page 1473
Update Transfer Amount	Enter	C1-PYTR-UPDT	C1-PYTR-UPDT	Refer to C1-PYTR-UPDT on page 1473
Approval In Progress	Enter	C1-PAY-PFA	C1-PAY-PFA	Refer to C1-PAY-PFA on page 1469

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Status	System Event	Algorithm	Algorithm Type	Description
	Exit	C1-PAYPFAEXT	C1-PAYPFAEXT	Refer to C1-PAYPFAEXT on page 1469
	Exit	F1-TODOCOMPL	F1-TODOCOMPL	Refer to F1-TODOCOMPL on page 1469
Approved	Enter	C1-PAY-APP	C1-PAY-APP	Refer to C1-PAY-APP on page 1470
Distribute	Enter	C1-PAY-DIST	C1-PAY-DIST	Refer to C1-PAY-DIST on page 1470
Deferred Distribution	Monitor	C1-PAY-MONT	C1-PAY-MONT	Refer to C1-PAY-MONT on page 1470
Distributed	Enter	C1-PAYTRANS	C1-PAYTRANS	Refer to C1-PAYTRANS on page 1474
	Exit	C1-FRZ-VALID	C1-FRZ-VALID	Refer to C1-FRZ-VALID on page 1470
	Exit	F1-TODOCOMPL	F1-TODOCOMPL	Refer to F1-TODOCOMPL on page 1469
Freezing	Enter	C1-PAY-V-FRZ	C1-PAY-V-FRZ	Refer to C1-PAY-V-FRZ on page 1470
	Enter	C1-PAY-FRZ	C1-PAY-FRZ	Refer to C1-PAY-FRZ on page 1470
Processed	-	-	-	-
Rejected	Enter	C1-PAY-RJT	C1-PAY-RJT	Refer to C1-PAY-RJT on page 1471
Discarded	Enter	C1-PAY-RJT	C1-PAY-RJT	Refer to C1-PAY-RJT on page 1471
Distribute And Freeze	Enter	C1-ISFREEZE	C1-ISFREEZE	Refer to C1-ISFREEZE on page 1471
Cancel	-	-	-	-

C1-PYTRDF

This algorithm invokes manual distribution algorithm of the match types that you have selected while creating a payment transfer request. It checks whether the payment transfer count exceeds the defer processing count. If the payment transfer count exceeds the defer processing count, the system changes the status of the payment transfer request to **Payment Derivation Pending**.

C1-PAY-DFT

This algorithm invokes the manual distribution algorithm of the match types that you have selected while creating a payment request.

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C1-PAYDFTEXT

This algorithm checks whether the sum of the distributed payment amount is equal to the tender or transfer amount. This algorithm is triggered when you click the **Distribute** button.

C1-PYTR-MONT

This algorithm is invoked from the **Payment Transfer Deferred Periodic Monitor (C1-PAYTR)** monitor batch. The system fetches the list of payments depending on whether payment transfer is done at the payment event or payment level. It then considers the payments which are eligible for transfer from the payment list based on the following transfer priority:

1. Payments created on the suspense contract (if any)
2. Payments created on the on account contract (if any)
3. Payments created on the excess credit contract (if any)
4. Payments created against bills in the descending order of bill date followed by the descending order of payment amount (when there two or more bills with the same bill date)

Once the system identifies the payments for transfer from the payment list, the payment transfer request is created and the status is changed from **Payment Derivation Pending** to **Draft**. A payment transfer record is created in the **C1_PAY_DETAILS** table along with the transfer priority and cancel switch.

C1-PYTR-UPDT

This algorithm is invoked when you click the **Update Transfer Amount** button. The system allows you to change the transfer amount, if required. On changing the transfer amount, system determines the payments which are eligible for transfer and changes the status of the payment transfer request to **Payment Derivation Pending** or **Draft**.

C1-PAY-PFA

This algorithm creates the To Do using the To Do type specified in the payment request type using which the payment request is created. The To Do is sent to the users with the approval To Do role specified in the payment request type.

C1-PAYPFAEXT

This algorithm checks whether the approver is associated with the approval To Do role specified in the payment request type. It does not allow the submitter to approve or reject the payment request.

F1-TODOCOMPL

This algorithm completes the To Do entries that are linked to an object when the object exits the given status. It finds and completes all open To Do entries where the business object's primary key is defined as a drill key. However, if the **Exclude To Do Entries From Auto Completion** (**F1-EXLTD**) characteristic is set to **Y** for a To Do type, the system does not automatically complete the respective To Do entry.

This algorithm contains the following parameter:

- **'Do Not Complete To Do Type' Char Type** – Used to specify the characteristic type that indicates whether the To Do entries should be automatically completed or not.

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Note: The **F1-EXLTD** characteristic type is shipped with the product. You can either use the **F1-EXLTD** characteristic type or a custom characteristic type, if required. Note that you must specify a predefined characteristic type where the characteristic entity is set to **To Do Type** and the predefined values are set to **Y** or **N**.

C1-PAY-APP

This algorithm changes the status of the payment request to **Freezing** when the approver clicks the **Approve** button.

C1-PAY-DIST

This algorithm invokes the defer algorithm specified in the payment request type using which the payment request is created. The defer algorithm checks whether the tender or transfer amount must be distributed in the real time (i.e. immediately) or in the deferred mode. If the tender or transfer amount must be distributed in the real time, the status of the payment request is changed to **Distributed**. However., if the tender or transfer amount must be distributed in the deferred mode, the status of the payment request is changed to **Deferred Distribution**.

C1-PAY-MONT

This algorithm is invoked from the **Payment Request Periodic Monitor (C1-PAYRQ)** batch. It changes the status of the payment request from **Deferred Distribution** to **Distributed**.

C1-PAYTRANS

his algorithm is invoked when the status of the payment transfer request is changed to **Distributed**. A payment is created for each record in the **C1_PAY_DISTRIBUTION** table where the payment amount is greater than or less than zero. The status of the new payments is set to **Freezable**. If any error occurs while creating a payment, the status of the payment is set to **Error**. The payment event ID is updated corresponding to the payment request in the **C1_PAY_REQ table**. Finally, the status of the payment request is changed to **Distributed**.

C1-PAYCREATE

This algorithm creates the payment event, payments, payment segments, and payment tender. A payment is created for each record in the **C1_PAY_DISTRIBUTION** table where the payment amount is greater than or less than zero. The status of the payments is set to **Freezable**. If any error occurs while creating a payment, the status of the payment is set to **Error**. The payment event ID is updated corresponding to the payment request in the **C1_PAY_REQ** table. Finally, the status of the payment request is changed to **Distributed**.

C1-FRZ-VALID

This algorithm is triggered when you click the **Submit for Approval** or **Freeze** button. It checks whether the sum of payment segment amount is equal to the payment amount for each payment.

C1-PAY-V-FRZ

This algorithm validates whether payment already exists on the entity. It checks the unpaid amount of the entity.

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C1-PAY-FRZ

This algorithm fetches the payment event created through the payment request. If you are freezing the payments of a payment creation request, this algorithm does the following:

- Changes the status of the payments which are in the **Freezable** status to **Frozen**.
- Changes the status of the payment event to **Balanced** when there are no payments in the **Error** status.

However, if you are freezing the payments of a payment transfer request, this algorithm does the following:

- Changes the status of the old payments which are in the **Frozen** status to **Cancelled**.
- Deletes the old payments which are in the **Error** status.
- Changes the status of the new payments which are in the **Freezable** status to **Frozen**.
- Changes the status of the payment event to **Balanced** when there are no payments in the **Error** status.

C1-PAY-RJT

This algorithm is triggered when the approver clicks the **Reject** button. If you are rejecting a payment creation request, this algorithm deletes the payment event, payments, payment segments, and payment tender which are created through the payment creation request. However, if you are rejecting a payment transfer request, this algorithm deletes the new payments which are created through the payment transfer request.

C1-ISFREEZE

This algorithm invokes the distribute algorithm and set Flag in the payment request clob.

Payment Request Type

Oracle Revenue Management and Billing allows you to define a payment request type using which you can create a payment request. A payment request of the specified payment request type is created when you manually distribute the tender or payment amount. It is the payment request type which helps the system to determine:

- Whether to create payment transfer or payment creation request.
- Whether payment events and payments must be created in real time (i.e. immediately) or in the deferred mode.
- Whether payment creation or transfer instructions must be approved by the approver before freezing payments.

The **Payment Request Type** screen allows you to define, edit, copy, and delete a payment request type. This screen consists of the following zones:

- Payment Request Type List on page 1475
- Payment Request Type on page 1476

Payment Request Type List

The **Payment Request Type List** zone lists payment request types that are already defined in the system. It contains the following columns:

Column Name	Column Description
Payment Request Type	Displays the payment request type.
Description	Displays the description of the payment request type.

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Column Name	Column Description
Edit	On clicking the **Edit** (✎) icon, the **Payment Request Type** screen appears where you can edit the details of the payment request type.
Duplicate	On clicking the **Duplicate** (⧉) icon, the **Payment Request Type** screen appears where you can define a payment request type using an existing payment request type.
Delete	On clicking the **Delete** (🗑) icon, you can delete the payment request type.
	Note: You can delete a payment request type only when a payment request is not yet created using the payment request type.

Note: Pagination is used to display limited number of records in this zone. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

On clicking the **Broadcast** (📡) icon corresponding to a payment request type, the **Payment Request Type** zone appears with the details of the respective payment request type.

Related Topics

For more information on...	See...
How to define a payment request type	Defining a Payment Request Type on page 1479
How to edit a payment request type	Editing a Payment Creation Request on page 1520
How to copy a payment request type	Copying a Payment Request Type on page 1488
How to delete a payment request type	Deleting a Payment Request Type on page 1492
How to view the details of a payment request type	Viewing the Payment Request Type Details on page 1492

Payment Request Type

The **Payment Request Type** zone displays the details of the payment request type. This zone contains the following sections:

- **Main** - This section provides basic information about the payment request type. It contains the following fields:

Field Name	Field Description
Payment Request Type	Displays the payment request type.
Payment Request Business Object	Indicates the business object using which a payment request should be created.
	Note: It has a link. On clicking the link, the **Business Object** screen appears where you can view the details of the respective business object.
Description	Displays the description of the payment request type.
Detailed Description	Displays additional information about the payment request type.
Status	Indicates the status of the payment request type. The valid values are: • Active • Inactive

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Field Name	Field Description
Defer Algorithm	Indicates the algorithm that is triggered when you distribute the tender or payment amount. **Note:** The **C1-PAY-COUNT** algorithm is shipped with the product. You need to attach this algorithm to the **Defer Algorithm** field. This algorithm checks whether the number of payment distribution records in the payment request exceeds the payment count. If the number of payment distribution records in the payment request does not exceed the payment count, the system distributes the tender or payment amount, and creates the payment event and the respective payments in real time (i.e. immediately). However, if the number of payment distribution records in the payment request exceeds the payment count, the system distributes the tender or payment amount in the deferred mode. This algorithm calculates the number of records to be processed for the account: Number of payment distribution records = (Number of bill segments present in each bill fetched using the bill weighted, bill regular, and bill match type algorithm) + (Number of bill segments fetched using the bill segment match type algorithm) + (Number of contracts fetched using the suspense contract match type algorithm) + (Number of settlements fetched using the settlement match type algorithm) It has a link. On clicking the link, the **Algorithm** screen appears where you can view the details of the respective algorithm.
Approval Required	Indicates whether approval is required while freezing the payments (of the payment requests) which are created using the payment request type.
Approval To Do Type	Indicates that the To Do entry of the specified To Do type must be created when a payment activation request is submitted for approval. **Note:** This field appears when the **Approval Required** option is selected. It has a link. On clicking the link, the **To Do Type** screen appears with the details of the respective To Do type.
Approval To Do Role	Indicates that users with the specified To Do role can only approve the payment request submitted for approval. **Note:** This field appears when the **Approval Required** option is selected. It has a link. On clicking the link, the **To Do Role** screen appears where you can view the details of the respective To Do role.
Transfer	Indicates whether the payment request type will be used to create payment transfer or payment creation request.
Defer Payment Processing Count	Indicates whether a payment request must be processed in the deferred mode (i.e. in the background) when the number of payments in the payment request exceed the defer processing count.

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Field Name	Field Description
	Note: This field appears when the **Transfer** option is selected.

- **Characteristics** - This section lists the characteristics of the payment request type. It contains the following columns:

Column Name	Column Description
Characteristic Type	Indicates the characteristic type.
Characteristic Value	Displays the value of the characteristic type.

- **Record Actions** - This section contains the following buttons:

Button Name	Button Description
Edit	Used to edit the details of the payment request type.
Delete	Used to delete the payment request type.
	Note: You can delete a payment request type when you have not created a payment request using the payment request type.
Duplicate	Used to create a new payment request type using an existing payment request type.

- **Record Information** - This section contains the following fields:

Field Name	Field Description
Business Object	Indicates the business object using which the payment request type is created. In addition, a context menu appears corresponding to this field which helps in navigating to other screens in the application.
	Note: It has a link. On clicking the link, the **Business Object** screen appears where you can view the details of the respective business object.

By default, the **Payment Request Type** zone does not appear in the **Payment Request Type** screen. It appears when you click the **Broadcast** (📡) icon corresponding to a payment request type in the **Payment Request Type List** zone.

Related Topics

For more information on...	See...
How to define a payment request type	Defining a Payment Request Type on page 1479
How to edit a payment request type	Editing a Payment Creation Request on page 1520
How to copy a payment request type	Copying a Payment Request Type on page 1488
How to delete a payment request type	Deleting a Payment Request Type on page 1492
How to view the details of a payment request type	Viewing the Payment Request Type Details on page 1492

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Defining a Payment Request Type

Prerequisites

To define a payment request type, you should have:

- Payment request type business objects defined in the application.
- Approval profiles defined in the application.
- The **C1-PAYRQ** To Do type assigned to a To Do role whose users must receive the To Do generated while submitting a payment request for an approval.
- Defer algorithm defined using the **C1-PAY-COUNT** algorithm type

Procedure

To define a payment request type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **P** and then click **Payment Request Type**.
   A sub-menu appears.
3. Click the **Add** option from the **Payment Request Type** sub-menu.

   The **Select Business Object** screen appears. It contains the following field:

Field Name	Field Description	Mandatory (Yes or No)
Payment Request Type Business Object	Used to indicate the business object that you want to use to create the payment request type.	Yes

Tip: Alternatively, you can access the **Select Business Object** screen by clicking the **Add** button in the **Page Title** area of the **Payment Request Type** screen.

Note: The **Select Business Object** screen appears when there are multiple payment request type business objects defined in the application. If there is only one payment request type business object defined in the application, the **Payment Request Type** screen appears.

4. Select the required payment request type business object from the respective field.
5. Click **OK**.

   The **Payment Request Type** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details about the payment request type.
   - **Characteristics** - Used to define the characteristics for the payment request type.

   The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Payment Request Type	Used to specify the payment request type.	Yes
Business Object	Indicates the business object using which you are defining the payment request type.	Not applicable
Payment Request Business Object	Used to indicate the business object using which you want to create the respective payment request. The valid values are:	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	• **Payment Request (C1-PaymentRequest)** - Enables you to create a payment request using the respective payment request type. • **Payment Transfer Request (C1-PaymentTransferRequest)** - Enables you to create a payment transfer request using the respective payment request type.	
Description	Used to specify the description for the payment request type.	Yes
Detailed Description	Used to specify additional information about the payment request type.	No
Status	Used to indicate the status of the payment request type. The valid values are: • Active • Inactive **Note:** You cannot change the status of a payment request type to **Inactive** when the corresponding payment request is in the **Draft** or **Approval In Progress** status.	Yes
Defer Algorithm	Used to attach an algorithm that will be triggered when you distribute tender or payment amount by clicking the **Distribute** button.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The **Search** (🔍) icon appears corresponding to the **Defer Algorithm** field. On clicking the **Search** icon, the **Algorithm Search** window appears. On specifying the algorithm, the description of the algorithm appears corresponding to the **Defer Algorithm** field. You need to attach an algorithm created using the **C1-PAY-COUNT** algorithm type to this field. This algorithm checks whether the number of payment distribution records in the payment request exceeds the payment count. If the number of payment distribution records in the payment request does not exceed the payment count, the system distributes the tender or payment amount, and creates the payment event and the respective payments in real time (i.e. immediately). However, if the number of payment distribution records in the payment request exceeds the payment count, the system distributes the tender or payment amount in the deferred mode. This algorithm calculates the number of records to be processed for the account in the following manner: Number of payment distribution records = (Number of bill segments present in each bill fetched using the bill weighted, bill regular, and bill match type algorithm) + (Number of bill segments fetched using the bill segment match type algorithm) + (Number of contracts fetched using the suspense contract match type algorithm) + (Number of settlements fetched using the settlement match type algorithm) Deferred mode means in the background when the **Payment Request Periodic Monitor (C1-PAYRQ)** batch is invoked. You can configure the **Payment Request Periodic Monitor (C1-PAYRQ)** batch such that it is executed at regular intervals. When the **Payment Request Periodic Monitor (C1-PAYRQ)** batch is invoked, the system checks whether there are any payment requests in the **Deferred Distribution** status. If there is a payment request in the **Deferred Distribution** status, the system distributes tender or payment amount and accordingly creates payment event and payments.	
Approval Required	Used to indicate whether approval is required to freeze the payments of the payment requests which are created using the respective payment request type.	No
Approval To Do Type	Used to indicate that the To Do entry of the specified To Do type must be created when the payment request is submitted for approval.	Yes (Conditional)

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The **Search** (🔍) icon appears corresponding to this field. On clicking the **Search** icon, the **To Do Type Search** window appears. On selecting the **To Do Type**, the description of the To Do type appears corresponding to the **Approval To Do Type** field. This field appears when the **Approval Required** option is selected. The **C1-PAYRQ** is shipped with the product. You can use the **C1-PAYRQ** To Do type or a custom To Do type, if required.	**Note:** This field is required when the **Approval Required** option is selected.
Approval To Do Role	Used to indicate that users with the specified To Do role can only approve the payment request submitted for approval. **Note:** This field appears when the **Approval Required** option is selected.	Yes (Conditional) **Note:** This field is required when the **Approval Required** option is selected.
Transfer	Used to indicate whether the payment request type is used to create either a payment request or payment transfer request.	No
Defer Payment Processing Count	Used to indicate whether a payment request must be processed in the deferred mode (i.e. in the background) when the number of payments in the payment request exceed the defer processing count. **Note:** Deferred mode means in the background when the **Payment Request Periodic Monitor (C1-PAYRQ)** batch is invoked. You can configure the **Payment Request Periodic Monitor (C1-PAYRQ)** batch such that it is executed at regular intervals. For more information about the **Payment Request Periodic Monitor (C1-PAYRQ)** batch, refer to *Oracle Revenue Management and Billing Batch Guide*. If the number of bills in a payment request does not exceed the defer processing count, the system processes the payment request in real time (i.e. immediately). You cannot specify a negative value in the **Defer Payment Processing Count** field. If you do not specify the defer payment processing count, by default, it is set to zero (0). This field appears when the **Transfer** option is selected.	No

6. Enter the required details in the **Main** section.
7. Define characteristics for the payment request type, if required.
8. Click **Save**.
   The payment request type is defined.

Related Topics

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For more information on...	See...
Payment Request Type screen	Payment Request Type on page 1475
Payment Request Type List zone	Payment Request Type List on page 1475
How to define a characteristic for a payment request type	Defining a Characteristic for a Payment Request Type on page 1483

Defining a Characteristic for a Payment Request Type

Prerequisites

To define a characteristic for a payment request type, you should have:

- Characteristic types defined in the application (where the characteristic entity is set to **Payment Request Type**).

Procedure

To define a characteristic for a payment request type:

1. Ensure that the **Characteristics** section is expanded when you are defining, editing, or *c*opying a payment request type.

   The **Characteristics** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Characteristic Type	Used to indicate the characteristic type.	Yes (Conditional)
	Note: The list includes only those characteristic types where the characteristic entity is set to **Payment Request Type**.	**Note:** This field is required when you are defining a characteristic for the payment request type.
Characteristic Value	Used to specify the value for the characteristic type.	Yes (Conditional)
	Note: If you select a predefined characteristic type, the **Search** (🔍) icon appears corresponding to the **Characteristic Value** field. On clicking the **Search** icon, you can search for a predefined characteristic value. On specifying the value for a predefined characteristic type, the description of the characteristic value appears corresponding to the **Characteristic Value** field.	**Note:** This field is required when you are defining a characteristic for the payment request type.

2. Enter the required details in the **Characteristics** section.
3. If you want to define more than one characteristic for the payment request type, click the **Add** (+) icon and *t*hen repeat step *2*.

Note: However, if you want to remove a characteristic from the payment request type, click the **Delete** (🗑) icon corresponding to the characteristic.

Related Topics

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For more information on...	See...
How to define a payment request type	Defining a Payment Request Type on page 1479
How to edit a payment request type	Editing a Payment Request Type on page 1484
How to copy a payment request type	Copying a Payment Request Type on page 1488

Editing a Payment Request Type

Prerequisites

To edit a payment request type, you should have:

- Payment request type business objects defined in the application.
- Approval profiles defined in the application.
- The **C1-PAYRQ** To Do type assigned to a To Do role whose users must receive the To Do generated while submitting a payment request for an approval.
- Defer algorithm defined using the **C1-PAY-COUNT** algorithm type

Procedure

To edit a payment request type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **P** and then click **Payment Request Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Payment Request Type** sub-menu.
   The **Payment Request Type** screen appears.
4. In the **Payment Request Type List** zone, click the **Edit** (✎) icon in the **Edit** column corresponding to the *p*ayment request type whose details you want to edit.

   The **Payment Request Type** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details about the payment request type.
   - **Characteristics** - Used to define the characteristics for the payment request type.

   The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Payment Request Type	Displays the payment request type.	Not applicable
Business Object	Indicates the business object which is used while defining the payment request type.	Not applicable
Payment Request Business Object	Used to indicate the business object using which you want to create the respective payment request. The valid values are: • **Payment Request (C1-PaymentRequest)** - Enables you to create a payment request using the respective payment request type.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	• **Payment Transfer Request (C1-PaymentTransferRequest)** - Enables you to create a payment transfer request using the respective payment request type.	
Description	Used to specify the description for the payment request type.	Yes
Detailed Description	Used to specify additional information about the payment request type.	No
Status	Used to indicate the status of the payment request type. The valid values are: • Active • Inactive **Note:** You cannot change the status of a payment request type to **Inactive** if there are payment requests which are created using the payment request type and are currently in the **Draft** or **Approval In Progress** status.	Yes
Defer Algorithm	Used to attach an algorithm that will be triggered when you distribute tender or payment amount by clicking the **Distribute** button.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The **Search** (🔍) icon appears corresponding to the **Defer Algorithm** field. On clicking the **Search** icon, the **Algorithm Search** window appears. On specifying the algorithm, the description of the algorithm appears corresponding to the **Defer Algorithm** field. You need to attach an algorithm created using the **C1-PAY-COUNT** algorithm type to this field. This algorithm checks whether the number of payment distribution records in the payment request exceeds the payment count. If the number of payment distribution records in the payment request does not exceed the payment count, the system distributes the tender or payment amount, and creates the payment event and the respective payments in real time (i.e. immediately). However, if the number of payment distribution records in the payment request exceeds the payment count, the system distributes the tender or payment amount in the deferred mode. This algorithm calculates the number of records to be processed for the account in the following manner: Number of payment distribution records = (Number of bill segments present in each bill fetched using the bill weighted, bill regular, and bill match type algorithm) + (Number of bill segments fetched using the bill segment match type algorithm) + (Number of contracts fetched using the suspense contract match type algorithm) + (Number of settlements fetched using the settlement match type algorithm) Deferred mode means in the background when the **Payment Request Periodic Monitor (C1-PAYRQ)** batch is invoked. You can configure the **Payment Request Periodic Monitor (C1-PAYRQ)** batch such that it is executed at regular intervals. When the **Payment Request Periodic Monitor (C1-PAYRQ)** batch is invoked, the system checks whether there are any payment requests in the **Deferred Distribution** status. If there is a payment request in the **Deferred Distribution** status, the system distributes tender or payment amount and accordingly creates payment event and payments.	
Approval Required	Used to indicate whether approval is required while freezing payments of the payment requests which are created using the payment request type.	No
Approval To Do Type	Used to indicate that the To Do entry of the specified To Do type must be created when the payment request is submitted for approval.	Yes (Conditional)

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The **Search** (🔍) icon appears corresponding to this field. On clicking the **Search** icon, the **To Do Type Search** window appears. On selecting the **To Do Type**, the description of the To Do type appears corresponding to the **Approval To Do Type** field. This field appears when the **Approval Required** check box is selected. The **C1-PAYRQ** is shipped with the product. You can use the **C1-PAYRQ** To Do type or a custom To Do type, if required.	**Note:** This field is required when the **Approval Required** option is selected.
Approval To Do Role	Used to indicate that users with the specified To Do role can only approve the payment request submitted for approval. **Note:** This field appears when the **Approval Required** check box is selected.	Yes (Conditional) **Note:** This field is required when the **Approval Required** option is selected.
Transfer	Used to indicate whether the payment request type will be used to create payment transfer or payment creation request.	No
Defer Payment Processing Count	Used to indicate whether a payment request must be processed in the deferred mode (i.e. in the background) when the number of payments in the payment request exceed the defer processing count. **Note:** Deferred mode means in the background when the **Payment Request Periodic Monitor (C1-PAYRQ)** batch is invoked. You can configure the **Payment Request Periodic Monitor (C1-PAYRQ)** batch such that it is executed at regular intervals. For more information about the **Payment Request Periodic Monitor (C1-PAYRQ)** batch, refer to *Oracle Revenue Management and Billing Batch Guide*. You cannot specify a negative value in the **Defer Payment Processing Count** field. If you do not specify the defer payment processing count, by default, it is set to zero (0). If the number of bills in a payment request does not exceed the defer processing count, the system processes the payment request in real time (i.e. immediately). This field appears when the **Transfer** option is selected.	No

Tip: Alternatively, you can click the **Edit** button in the **Payment Request Type** zone to edit the details of the payment request type.

5. Modify the required details in the **Main** section.
6. Define, edit, or remove characteristics of the payment request type, if required.

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7. Click **Save**.
   The changes made to the payment request type are saved.

Related Topics

For more information on...	See...
Payment Request Type screen	Payment Request Type on page 1475
Payment Request Type List zone	Payment Request Type List on page 1475
Payment Request Type zone	Payment Request Type on page 1476
How to define a characteristic for a payment request type	Defining a Characteristic for a Payment Request Type on page 1483

Copying a Payment Request Type

Instead of creating a payment request type from scratch, you can create a new payment request type using an existing payment request type. This is possible through copying a payment request type. On copying a payment request type, the details including the characteristics are copied to the new payment request type. You can then edit the details, if required.

Prerequisites

To copy a payment request type, you should have:

- Payment request type (whose copy you want to create) defined in the application.
- Payment request business objects defined in the application.
- The **C1-PAYRQ** To Do type assigned to a To Do role whose users must receive the To Do generated while submitting a payment request for an approval.
- Defer algorithm defined using the **C1-PAY-COUNT** algorithm type.

Procedure

To copy a payment request type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **P** and then click **Payment Request Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Payment Request Type** sub-menu.
   The **Payment Request Type** screen appears.
4. In the **Payment Request Type List** zone, click the **Duplicate**(⧉) icon in the **Duplicate** column *c*orresponding to the payment request type whose copy you want to create.

   The **Payment Request Type** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details about the payment request type.
   - **Characteristics** - Used to define the characteristics for the payment request type.

   The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Payment Request Type	Used to specify the payment request type.	Yes
Business Object	Indicates the business object using which you are defining the payment request type.	Not applicable

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Field Name	Field Description	Mandatory (Yes or No)
Payment Request Business Object	Used to indicate the business object using which you want to create the respective payment request. The valid values are: • **Payment Request (C1-PaymentRequest)** - Enables you to create a payment request using the respective payment request type. • **Payment Transfer Request (C1-PaymentTransferRequest)** - Enables you to create a payment transfer request using the respective payment request type.	Yes
Description	Used to specify the description for the payment request type.	Yes
Detailed Description	Used to specify additional information about the payment request type.	No
Status	Used to indicate the status of the payment request type. The valid values are: • Active • Inactive **Note:** You cannot change the status of a payment request type to **Inactive** if there are payment requests which are created using the payment request type and are currently in the **Draft** or **Approval In Progress** status.	Yes
Defer Algorithm	Used to attach an algorithm that will be triggered when you distribute tender or payment amount by clicking the **Distribute** button.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The **Search** (🔍) icon appears corresponding to the **Defer Algorithm** field. On clicking the **Search** icon, the **Algorithm Search** window appears. On specifying the algorithm, the description of the algorithm appears corresponding to the **Defer Algorithm** field. You need to attach an algorithm created using the **C1-PAY-COUNT** algorithm type to this field. This algorithm checks whether the number of payment distribution records in the payment request exceeds the payment count. If the number of payment distribution records in the payment request does not exceed the payment count, the system distributes the tender or payment amount, and creates the payment event and the respective payments in real time (i.e. immediately). However, if the number of payment distribution records in the payment request exceeds the payment count, the system distributes the tender or payment amount in the deferred mode. This algorithm calculates the number of records to be processed for the account in the following manner: Number of payment distribution records = (Number of bill segments present in each bill fetched using the bill weighted, bill regular, and bill match type algorithm) + (Number of bill segments fetched using the bill segment match type algorithm) + (Number of contracts fetched using the suspense contract match type algorithm) + (Number of settlements fetched using the settlement match type algorithm) Deferred mode means in the background when the **Payment Request Periodic Monitor (C1-PAYRQ)** batch is invoked. You can configure the **Payment Request Periodic Monitor (C1-PAYRQ)** batch such that it is executed at regular intervals. When the **Payment Request Periodic Monitor (C1-PAYRQ)** batch is invoked, the system checks whether there are any payment requests in the **Deferred Distribution** status. If there is a payment request in the **Deferred Distribution** status, the system distributes tender or payment amount and accordingly creates payment event and payments.	
Approval Required	Used to indicate whether approval is required to freeze the payments of the payment requests which are created using the respective payment request type.	No
Approval To Do Type	Used to indicate that the To Do entry of the specified To Do type must be created when the payment request is submitted for approval.	Yes (Conditional)

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The **Search** (🔍) icon appears corresponding to this field. On clicking the **Search** icon, the **To Do Type Search** window appears. On selecting the **To Do Type**, the description of the To Do type appears corresponding to the **Approval To Do Type** field. This field appears when the **Approval Required** check box is selected. The **C1-PAYRQ** is shipped with the product. You can use the **C1-PAYRQ** To Do type or a custom To Do type, if required.	**Note:** This field is required when the **Approval Required** option is selected.
Approval To Do Role	Used to indicate that users with the specified To Do role can only approve the payment request submitted for approval. **Note:** This field appears when the **Approval Required** check box is selected.	Yes (Conditional) **Note:** This field is required when the **Approval Required** option is selected.
Transfer	Used to indicate whether the payment request type is used to create either a payment request or payment transfer request.	No
Defer Payment Processing Count	Used to indicate whether a payment request must be processed in the deferred mode (i.e. in the background) when the number of payments in the payment request exceed the defer processing count. **Note:** Deferred mode means in the background when the **Payment Request Periodic Monitor (C1-PAYRQ)** batch is invoked. You can configure the **Payment Request Periodic Monitor (C1-PAYRQ)** batch such that it is executed at regular intervals. For more information about the **Payment Request Periodic Monitor (C1-PAYRQ)** batch, refer to *Oracle Revenue Management and Billing Batch Guide*. You cannot specify a negative value in the **Defer Payment Processing Count** field. If you do not specify the defer payment processing count, by default, it is set to zero (0). If the number of bills in a payment request does not exceed the defer processing count, the system processes the payment request in real time (i.e. immediately). This field appears when the **Transfer** option is selected.	No

Tip: Alternatively, you can click the **Duplicate** button in the **Payment Request Type** zone to create a copy of the payment request type.

5. Enter the required details in the **Main** section.
6. Define, edit, or remove characteristics of the payment request type, if required.
7. Click **Save**.

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The new payment request type is defined.

Related Topics

For more information on...	See...
Payment Request Type screen	Payment Request Type on page 1475
Payment Request Type List zone	Payment Request Type List on page 1475
Payment Request Type zone	Payment Request Type on page 1476
How to define a characteristic for a payment request type	Defining a Characteristic for a Payment Request Type on page 1483

Deleting a Payment Request Type

Procedure

To delete a payment request type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **P** and then click **Payment Request Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Payment Request Type** sub-menu.
   The **Payment Request Type** screen appears.
4. In the **Payment Request Type List** zone, click the **Delete** (🗑) icon in the **Delete** column corresponding to the *p*ayment request type that you want to delete.
   A message appears confirming whether you want to delete the payment request type.

   Note: You can delete a payment request type when you have not created a payment request using the payment request type.

   Tip: Alternatively, you can click the **Delete** button in the **Payment Request Type** zone to delete the payment request type.
5. Click **OK**.
   The payment request type is deleted.

Related Topics

For more information on...	See...
Payment Request Type screen	Payment Request Type on page 1475
Payment Request Type List zone	Payment Request Type List on page 1475
Payment Request Type zone	Payment Request Type on page 1476

Viewing the Payment Request Type Details

Procedure

To view the details of a payment request type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.

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2. From the **Admin** menu, select **P** and then click **Payment Request Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Payment Request Type** sub-menu.
   The **Payment Request Type** screen appears.
4. In the **Payment Request Type List** zone, click the **Broadcast** (ᯤ) icon corresponding to the payment request *t*ype whose details you want to view.
   The **Payment Request Type** zone appears.
5. View the details of the payment request type in the **Payment Request Type** zone.

Related Topics

For more information on...	See...
Payment Request Type screen	Payment Request Type on page 1475
Payment Request Type List zone	Payment Request Type List on page 1475
Payment Request Type zone	Payment Request Type on page 1476

Payment Request (Used for Searching)

The **Payment Request** screen allows you to search for a payment creation or transfer request using various search criteria. It also allows you to create payment creation and transfer requests. It contains the following zone:

- Search Payment Request on page 1493

Through this screen, you can navigate to the following screen:

- Payment Request (Used for Viewing) on page 1506

Search Payment Request

The **Search Payment Request** zone allows you to search for a payment request using various search criteria. This zone contains the following two sections:

- **Search Criteria** - The **Search Criteria** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Search By	Used to indicate whether you want to search for a payment request using request or payment details. The valid values are: • Request Details • Payment Details **Note:** By default, the **Request Details** option is selected.	Yes
Creation From Date	Used to search for payment requests which are created on or after the specified date.	No

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Field Name	Field Description	Mandatory (Yes or No)
	Note: This field appears when you select the **Request Details** option from the **Search By** list. You can either manually specify the date or select it using the **Date Picker** () icon corresponding to the field. Simultaneously, you can also specify the time or select it using the **Time Picker** () icon corresponding to the field. The creation from date cannot be later than the created to date.	
Payment Request Status	Used to search for payment requests with a particular status. The valid values are: • Approval In Progress • Cancel • Deferred Distribution • Discarded • Distribute And Freeze • Distributed • Draft • Payment Derivation Pending • Processed • Rejected **Note:** This field appears when you select the **Request Details** option from the **Search By** list.	No
Created To	Used to search payment requests which are created on or after the specified date. **Note:** This field appears when you select the **Request Details** option from the **Search By** list. You can either manually specify the date or select it using the **Date Picker** () icon corresponding to the field. Simultaneously, you can also specify the time or select it using the **Time Picker** () icon corresponding to the field. The created to date cannot be earlier than the creation from date.	No
User ID	Used to search for payment requests which are created by a particular user.	No

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Field Name	Field Description	Mandatory (Yes or No)
	Note: This field appears when you select the **Request Details** option from the **Search By** list. The **Search** (🔍) icon appears corresponding to this field. On clicking the **Search** icon, the **User Search** window appears.	
Payment Request Type	Used to search for payment requests which are created using a particular payment request type. **Note:** This field appears when you select the **Request Details** option from the **Search By** list.	No
Payment Request ID	Used to search a particular payment request. **Note:** This field appears when you select the **Request Details** option from the **Search By** list.	No
Payment Event ID	Used to search a payment request which contains a particular payment event. **Note:** This field appears when you select the **Payment Details** option from the **Search By** list. The **Search** (🔍) icon appears corresponding to this field. On clicking the **Search** icon, the **Payment Event Search** window appears.	No
Payor Account ID	Used to search for payment requests which are created for a particular payor account. **Note:** This field appears when you select the **Payment Details** option from the **Search By** list. The **Search** (🔍) icon appears corresponding to this field. On clicking the **Search** icon, the **Account Search** window appears.	No
Payment Date	Used to search payment requests through which payments are created on a particular date. **Note:** This field appears when you select the **Payment Details** option from the **Search By** list. You can either manually specify the date or select it using the **Date Picker** (📅) icon corresponding to the field.	No

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Field Name	Field Description	Mandatory (Yes or No)
Payor Name	Used to search payment requests which are created for a particular payor. **Note:** This field appears when you select the **Payment Details** option from the **Search By** list.	No

Note: You must specify at least one search criterion while searching for a payment request.

- **Search Results** - On clicking the **Search** button, the search results appear based on the specified search criteria. The **Search Results** section contains the following columns:

Column Name	Column Description
Creation Date Time	Displays the date and time when the payment request was created in the system.
Payment Request Information	Displays information about the payment request. **Note:** It has a link. On clicking the link, the **Payment Request** screen appears where you can view the details of the respective payment request.
Status	Indicates the status of the payment request. The valid values are: • Approval In Progress • Cancel • Deferred Distribution • Discarded • Distribute And Freeze • Distributed • Draft • Payment Derivation Pending • Processed • Rejected
Payment Event Information	Displays information about the payment event. **Note:** It has a link. On clicking the link, the **Payment Event** screen appears with the details of the respective payment event.
Created By	Indicates the user who has created the payment request.
Payor Account Information	Displays information about the payor's account for which the payment request is created. In addition, this column has a context menu (⌄) icon which helps in navigating to other screens in the application. **Note:** It has a link. On clicking the link, the **Account** screen appears where you can view the details of the respective payor account.

Note: Pagination is used to display limited number of records in the **Search Results** section. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

Related Topics

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For more information on...	See...
How to search for a payment request	Searching for a Payment Request on page 1497
How to create a payment request	Creating a Payment Creation Request on page 1497
How to view the details of a payment request	Viewing the Payment Creation Request Details on page 1506

Searching for a Payment Request

Prerequisites

To search for a payment request, you should have:

- Payment request types defined in the application.

Procedure

To search for a payment request:

1. Click the **Menu** link in the **Application** toolbar.
   A list appears.
2. From the **Main** menu, select **Payments** and then click **Payment Request**.
   A sub-menu appears.
3. Click the **Search** option from the **Payment Request** sub-menu.
   The **Payment Request** screen appears.
4. Enter the search criteria in the **Search Payment Request** zone.

> **Note:** ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.

5. Click **Search**.
   A list of payment requests that meet the search criteria appears in the **Search Results** section.

Related Topics

For more information on...	See...
Payment Request screen	Payment Request (Used for Searching) on page 1493
Search Payment Request zone	Search Payment Request on page 1493

Creating a Payment Creation Request

Prerequisites

To create a payment creation request, you should have:

- Payment request types defined in the application (where the **Transfer** option is not selected).
- Required match types defined in the application.
- Required tender types and tender sources defined in the application.

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- Required characteristic types defined in the application (where the characteristic entity is set to **Payment**).
- Required characteristic types defined in the application (where the characteristic entity is set to **Payment Tender**).

Procedure

To create a payment creation request:

1. Click the **Menu** link in the **Application** toolbar.
   A list appears.
2. From the **Main** menu, select **Payments** and then click **Payment Request**.
   A sub-menu appears.
3. Click the **Add** option from the **Payment Request** sub-menu.

   The **Select Payment Request Type** screen appears. It contains the following field:

Field Name	Field Description	Mandatory (Yes or No)
Payment Request Type	Used to indicate the payment request type using which you want to create the payment creation request. **Note:** The list includes only those payment request types which are already defined in the system where the **Transfer** option is not selected.	Yes

Tip: Alternatively, you can access the **Select Payment Request Type** screen by clicking the **Add** button in the **Page Title** area of the **Payment Request** screen.

4. Select the required payment request type from the respective field.
5. Click **OK**.

   The **Payment Request** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details about the payment creation request.
   - **Tender Details** - Used to specify the tender details in the payment creation request.
   - **Characteristics** - Used to define the characteristics for the payment tender.
   - **Match Types** - Used to define match types for the payment creation request.

   The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Payment Request Type	Indicates the payment request type using which you want to create the payment creation request.	Not applicable
Payor Account Information	Used to indicate the payor account for which you want to create the payment creation request. **Note:** The **Search** (🔍) icon appears corresponding to this field. On clicking the **Search** icon, the **Account Search** window appears. On specifying the account ID, the information about the account appears corresponding to the **Payor Account Information** field.	Yes
Payment Date	Used to specify the date when the payment was made.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	Note: By default, the current date appears in this field. You can either manually specify the date or select it using the **Date Picker** ( ) icon corresponding to the field.	

6. Enter the required details in the **Main** section.
7. Add the required tender details in the payment creation request.
8. Define characteristics for the tender, if required.
9. Define the required match types for the payment creation request.
10. Click **Manual Distribution**.
    The payment creation request is created and the status of the payment creation request is set to **Draft**.

Note:

If a payment creation request is already created for a payee account and is currently in progress, the system will not allow you to create another payment creation request for a payee account, until the status of this payment creation request is either changed to **Processed** or **Rejected**.

The system does not allow you to create a payment creation request for a payee account when the respective match type entities such as, unpaid bills, unpaid bill segments, contracts, or settlement IDs do not exist for a payee account.

Related Topics

For more information on...	See...
Search Payment Request zone	Search Payment Request on page 1493
How to define a characteristic for a payment tender	Defining a Characteristic for a Payment Tender on page 1503
How to add the tender details in a payment request	Adding the Tender Details in a Payment Creation Request on page 1499
How to define the match types for a payment creation request	Defining a Match Type in a Payment Creation Request on page 1503

Adding the Tender Details in a Payment Creation Request

Prerequisites

To add the tender details in a payment creation request, you should have:

- Required tender types and tender sources defined in the application.
- Required characteristic types defined in the application (where the characteristic entity is set to **Payment Tender**).

Procedure

To add the tender details in a payment creation request:

1. Ensure that the **Tender Details** section is expanded when you are defining or editing a payment creation request.

   The **Tender Details** section contains the following fields:

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Field Name	Field Description	Mandatory (Yes or No)
Tender Type	Used to indicate the payment method through which the payment is made. **Note:** This list includes only those tender types which are defined in the system.	Yes
Tender Amount	Used to specify the tender amount. **Note:** By default, this field is disabled. It is enabled when you specify the payor account information in the **Main** section. You must not specify the value less than or equal to zero. The precision specified for the tender amount must not exceed the decimal places defined for the currency in the system.	Yes
Currency	Used to indicate the currency in which the payment is made. **Note:** By default, this field is disabled. It is enabled when you specify the payor account information. If the currency is not specified, it is set to the payor account's invoice currency.	Yes
Check Number	Used to specify the check number if the payment is made through a check.	No
Auto Pay Route Type Code	Used to indicate how and when an automatic payment request of an account is routed to a financial institution. **Note:** This field appears only when you have selected the **Generate Auto Pay** option for a tender type in the **Tender Type** screen. The **Search** (🔍) icon appears corresponding to the **Auto Pay Route Type Code** field. On clicking the **Search** icon, the **Auto Pay Route Type Search** window appears. On specifying the auto pay route type, the description of the auto pay route type appears corresponding to the **Auto Pay Route Type Code** field.	Yes (Conditional) **Note:** This field is required only when you have selected the **Generate Auto Pay** option for a tender type in the **Tender Type** screen.
Schedule Extract Date	Displays the date when the system automatically extracts the payment information from the source system.	Not applicable

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The data appears only when you: • Select a tender type where the **Generate Auto Pay** option is selected in the **Tender Type** screen. • Specify the values for **Auto Pay Route Type Code** and **Auto Pay Source Code** fields.	
Auto Pay Source Code	Used to indicate the financial institution that receives the automatic payment request. **Note:** This field appears only when you have selected the **Generate Auto Pay** option for a tender type in the **Tender Type** screen. The **Search** (🔍) icon appears corresponding to this field. On clicking the **Search** icon, the **Auto Pay Source Search** window appears. On specifying the auto pay source code, the description of the auto pay source code appears corresponding to the **Auto Pay Source Code** field.	Yes (Conditional) **Note:** This field is required only when you have selected **Generate Auto Pay** option for a tender type in the **Tender Type** screen.
Distribution and Freeze Date	Displays the date when the status of the automatic payment is changed to **Distributed and Freeze**. **Note:** The data appears only when you: • Select a tender type where the **Generate Auto Pay** check box is selected. • Specify the values for **Auto Pay Route Type Code** and **Auto Pay Source Code** fields.	Not applicable
Account Number	Used to indicate the bank account number through which the automatic payment is made. **Note:** This field appears only when you select the **Generate Auto Pay** option for a tender type in the **Tender Type** screen.	Yes (Conditional) **Note:** This field is required only when you have selected **Generate Auto Pay** option for a tender type in the **Tender Type** screen.
Expires On	Used to specify the date till when the tender is effective. **Note:** This field appears only when you select the **Generate Auto Pay** option for a tender type in the **Tender Type** screen.	No
Name	Used to specify the name of the person as maintained in the financial institution's system.	No

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Field Name	Field Description	Mandatory (Yes or No)
	Note: This field appears only when you select the **Generate Auto Pay** option for a tender type in the **Tender Type** screen. By default, the payor name appears in this field.	
MICR ID	Used to specify the MICR ID for the payment purposes.	No
Ext. Reference ID	Used to specify the external reference ID associated with the tender source.	No
Person ID	Used to specify the person ID to whom the payment is made.	No
Name	Used to specify the name of the person to whom the payment is made.	No
Tender Control ID	Used to indicate the tender control ID. **Note:** The **Search** (🔍) icon appears corresponding to the **Tender Control ID** field. On clicking the **Search** icon, the **Tender Control Search** window appears. On specifying the tender control ID, the description of the tender control ID appears corresponding to the **Tender Control ID** field.	No
Deposit Control Information	Used to indicate the deposit control ID. **Note:** It is a read-only field. The data appears in this field when the tender control ID is specified.	No

2. Enter the required details.

Note: If the auto pay instructions are defined for the payor account, by default, the auto pay data appears in the **Auto Pay Route Type Code**, **Auto Pay Source Code**, **Account Number**, **Expires On**, and **Name** fields.

Related Topics

For more information on...	See...
How to create a payment creation request	Creating a Payment Creation Request on page 1497
How to edit a payment creation request	Editing a Payment Creation Request on page 1520

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Defining a Characteristic for a Payment Tender

Prerequisites

To define a characteristic for a payment tender, you should have:

- Characteristic types defined in the application (where the characteristic entity is set to **Payment Tender**).

Procedure

To define a characteristic for a payment tender:

1. Ensure that the **Characteristics** section is expanded when you are defining or editing a payment creation request.

   The **Characteristics** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Characteristic Type	Used to indicate the characteristic type.	Yes (Conditional)
	Note: The list includes only those characteristic types where the characteristic entity is set to **Payment Tender**.	**Note:** This field is required when you are defining a characteristic for the payment tender.
Characteristic Value	Used to specify the value for the characteristic type.	Yes (Conditional)
	Note: If you select a predefined characteristic type, the **Search** (🔍) icon appears corresponding to the **Characteristic Value** field. On clicking the **Search** icon, you can search for a predefined characteristic value. On specifying the value for a predefined characteristic type, the description of the characteristic value appears corresponding to the **Characteristic Value** field.	**Note:** This field is required when you are defining a characteristic for the payment tender.

2. Enter the required details.
3. If you want to define more than one characteristic for the payment tender, click the **Add** (+) icon and then *r*epeat step 2.

> **Note:** However, if you want to remove a characteristic from the payment tender, click the **Delete** (🗑) icon corresponding to the characteristic.

Related Topics

For more information on...	See...
How to create a payment creation request	Creating a Payment Creation Request on page 1497
How to edit a payment creation request	Editing a Payment Creation Request on page 1520

Defining a Match Type in a Payment Creation Request

Prerequisites

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To define a match type in a payment creation request, you should have:

- Required match types defined in the application.

Procedure

To define a match type in a payment creation request:

1. Ensure that the **Match Types** section is expanded when you are defining or editing a payment creation request.

   The **Match Types** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Match Type	Used to indicate the match type using which the payment must be matched.	Yes
Show Default	Used to indicate whether the default payment amount should be displayed against the match type entities. **Note:** By default, the **Show Default** option is selected when you select the match type.	No
Entity	Indicates the match type entity. The valid values are: • **Account** - Enables you to select the account whose unpaid bills, unpaid bill segments, settlement IDs, or contracts are considered against which the payment must be matched. • **Bill** - Enables you to select the unpaid bill against which the payment must be matched. • **Person** - Enables you to select the person against which the payment must be matched. • **Statement** - Enables you to select the statement against which the payment must be matched.	Not applicable
Entity ID	Used to indicate the entity (such as, account, bill, person, or statement) against which the entity must be matched. **Note:** The **Search** (🔍) icon appears corresponding to the **Entity ID** field. On clicking the **Search** icon the respective entity **Search** window appears. On specifying the entity, the description of the entity appears corresponding to the **Entity ID** field. If you want to edit the entity ID, you need to first remove the row and then add it again with the updated information.	Yes

2. Enter the required details.
3. If you want to specify more than one match type for the payment request, click the **Add** (+) icon and then *r*epeat step 2.

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Note:

However, if you want to remove a match type from the payment creation request, click the **Delete** (🗑) icon corresponding to the match type.

You cannot edit an existing row in the **Match Types** section. If you want to edit the details of an existing row, you need to first remove the row and then add it again with the updated information.

You can use multiple match types in the payment creation or transfer request. But, while using the match type where the entity type is set **Person**, you cannot use any another match type where the entity type is set to **Account** or **Bill**. You are only allowed to use additional match types where the entity type is set **Person**.

Once the payment creation request is created in the **Draft** status, then depending on the match type and match entity specified while creating the payment creation request, the following entities are listed in the **Payment Distribution** zone, as follows:

Match Type	Match Entity	Entities
By Bill Regular	Account	Unpaid bills of the account
By Bill Weighted	Account	Unpaid bills of the account
By Bill	Bill	Unpaid bill
By Bill Segments	Account	Unpaid bill segments
By Suspense Contract	Account	Contracts of the account **Note:** Only contracts of the contract type where the **Eligible for Billing** flag is set to **No** and **Special Role** flag is set to **Suspense** are listed in the **Payment Distribution** zone. If no contracts with this specification exist for the account, the system checks whether there is any such contract type (where the **Eligible for Billing** flag is set to **No** and **Special Role** flag is set to **Suspense**) defined for the division to which the account belongs. If there is any such contract type defined for the division, the system creates the contract for the account using the respective contract type and the same is listed in **Payment Distribution** zone.
By Settlement	Account	Unpaid bill segments where the settlement account is stamped
By Statement	Statement	Unpaid bills of the statement
By Person	Person	Unpaid bills of the person’s accounts and all its child persons’ accounts

If the **Show Default** option is not selected against a match type while creating the payment creation request, the system sets the payment amount against the respective match type entity to zero. However, if the **Show Default** option is selected, the payment amount appears against the respective match type entity. The tender amount is further divided among the entities in the sequence of match types followed by the sequence of bill, bill segment, or contract start date.

Related Topics

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For more information on...	See...
Search Payment Request zone	Search Payment Request on page 1493
How to define a characteristic for a payment tender	Defining a Characteristic for a Payment Tender on page 1503
Payment Request screen	Payment Request (Used for Viewing) on page 1506
Payment Details screen	Payment Details on page 1514
Payment Distribution zone	Payment Distribution on page 1514

Viewing the Payment Creation Request Details

Procedure

To view the details of a payment creation request:

1. Search for the payment creation request in the **Payment Request** screen.
2. In the **Search Results** section, click the link in the **Payment Request Information** column corresponding to *t*he payment creation request whose details you want to view.

   The **Payment Request** screen appears. It consists of the following tabs:

   - Payment Request - Main on page 1507
   - Payment Request - Log on page 1517
3. Ensure that the **Main** tab is selected.
4. View the details of the payment creation request in the **Payment Request** zone.
5. View the payment details in the **Payment Details** zone.
6. View the payment distribution records in the **Payment Distribution** zone.

Related Topics

For more information on...	See...
How to search for a payment request	Searching for a Payment Request on page 1497
Payment Request screen	Payment Request (Used for Viewing) on page 1506
Payment Request zone	Payment Request on page 1507
Payment Details zone	Payment Details on page 1514
Payment Distribution zone	Payment Distribution on page 1514

Payment Request (Used for Viewing)

Once you create a payment creation or transfer request, the **Payment Request** screen allows you to:

- Edit the details of a payment request
- Edit the payment amount against each entity
- Delete a payment request
- View the details of a payment request
- Distribute the tender or payment amount
- Edit the amount of a payment segment

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- Freeze the payments created through a payment request
- Submit a payment request for approval before freezing payments
- Approve or reject a payment request
- View the log of a payment request
- Add a log entry for a payment request
- View the payments transferred through a payment request
- Update the transfer amount against each entity
- Redistribute the tender or payment amount of a payment segment

It consists of the following tabs:

- Payment Request - Main on page 1507
- Payment Request - Log on page 1517

Payment Request - Main

The **Main** tab displays information about the payment request. It contains the following zones:

- Payment Request on page 1507
- Payment Details on page 1514
- Payment Distribution on page 1514

Payment Request

The **Payment Request** zone displays the details of the payment request. It contains the following sections:

- **Main** - Displays basic information about the payment request. It contains the following fields:

Field Name	Field Description
Payment Request Information	Displays information about the payment request.
Payment Request Type	Indicates the payment request type using which the payment request is created. **Note:** It has a link. On clicking the link, the **Payment Request Type** screen appears where you can view the details of the payment request type.
Payment Request Status	Indicates the status of the payment request. The valid values are: • Approval In Progress • Cancel • Deferred Distribution • Discarded • Distribute And Freeze • Distributed • Draft • Payment Derivation Pending • Processed • Rejected
Status Reason	Indicates the reason why the payment request is rejected.

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Field Name	Field Description
	Note: This field appears when the payment request is in the **Rejected** status. It has a link. On clicking the link, the **Status Reason** screen appears where you can view the details of the rejected reason.
Payor Account Information	Displays information about the payor's account for which the payment request is created.
	Note: This field appears when you are viewing the details of a payment creation request. It has a link. On clicking the link, the **Account** screen appears where you can view the details of the respective account.
Comments	Displays additional information about the payment request.
	Note: This field appears when the payment request is either in one of the following statuses: • Approval In Progress • Deferred Distribution • Discarded • Distribute and Freeze • Distributed • Processed • Rejected
Payment Date	Displays the date when the payment request is created.
Payment Event Information	Displays information about the payment event.
	Note: If you are viewing the details of a payment creation request, this field displays information about the payment event which is created through the payment creation request. However, if you are viewing the details of a payment transfer request, this field displays information about the payment event whose payments you want to transfer. This field does not appear when the payment request is in the **Rejected** status. If you are viewing the details of a payment creation request, this field does not appear when the payment creation request is in the **Draft** status. It has a link. On clicking the link, the **Payment Event** screen appears where you can view the details of the respective payment event.
Maximum Transfer Amount	Displays the maximum amount which can be transferred.
	Note: This field appears when you are viewing the details of a payment transfer request.
Transfer Amount	Displays the total payment amount which you want to transfer.

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Field Name	Field Description
	Note: This field appears when you are viewing the details of a payment transfer request.
Transfer Reason	Indicates the reason why you want to transfer the payment amount.
	Note: This field appears when you are viewing the details of a payment transfer request.

- **Tender Details** - Lists the tender details for the payment request. It contains the following fields:

Field Name	Field Description
Tender Type	Indicates the type of tender through which the payment is made.
Tender Amount	Displays the tender amount.
Currency	Indicates the currency in which the payment is made.
Check Number	Displays the cheque number if the payment is made through the cheque.
Auto Pay Route Type Code	Indicates how and when an automatic payment request of an account is routed to a financial institution.
	Note: This field appears only when you have selected the **Generate Auto Pay** option for a tender type in the **Tender Type** screen.
Schedule Extract Date	Displays the date when the system automatically extracts the payment information from the source system.
	Note: This field appears only when you have selected the **Generate Auto Pay** option for a tender type in the **Tender Type** screen.
Auto Pay Source Code	Indicates the financial institution that receives the automatic payment request.
	Note: This field appears only when you have selected the **Generate Auto Pay** option for a tender type in the **Tender Type** screen.
Distribution and Freeze Date	Displays the date when the status of the automatic payment is changed to **Distributed and Freeze**.
	Note: This field appears only when you have selected the **Generate Auto Pay** option for a tender type in the **Tender Type** screen.
Account Number	Indicates the bank account number through which the automatic payment is made.
	Note: This field appears only when you have selected the **Generate Auto Pay** option for a tender type in the **Tender Type** screen.
Expires On	Displays the date till when the tender is effective.
	Note: This field appears only when you have selected the **Generate Auto Pay** option for a tender type in the **Tender Type** screen.
Name	Displays the name of the person as maintained in the financial institution's system.

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Field Name	Field Description
	Note: This field appears only when you have selected the **Generate Auto Pay** option for a tender type in the **Tender Type** screen.
Tender Control Information	Displays information about the tender control which is created when the payment event and payments are created. In addition, this column has a context menu (⊙) icon which helps in navigating to other screens in the application.
	Note: It has a link. On clicking the link, the **Tender Control** screen appears where you can view the details of the respective tender control. This field appears when the payment request is in **Distributed**, **Approval In Progress**, **Processed**, or **Rejected** status.
Deposit Control Information	Displays information about the deposit control which is created when the payment event and payments are created. In addition, this column has a context menu (⊙) icon which helps in navigating to other screens in the application.
	Note: It has a link. On clicking the link, the **Deposit Control** screen appears where you can view the details of the respective deposit control. This field appears when the payment request is in **Distributed**, **Approval In Progress**, **Processed**, or **Rejected** status.
Pay Tender ID	Displays the payment tender ID.
	Note: This field appears only when the payment request is in the **Processed** status.
Tender Status	Indicates the current status of the tender. The valid values are: • Valid • Cancelled
	Note: The list includes only those values which are defined in the **TNDR_STATUS_FLG** lookup field. This field appears when the payment request is in the **Processed** status.
MICR ID	Displays the MICR ID used for payment purposes.
Ext. Reference ID	Displays the external reference ID associated with the tender source.
Person ID	Displays the person ID to whom the payment is made.
Name	Displays the name of the person to whom the payment is made.

Note: This section appears when you are viewing the details of a payment creation request.

- **Characteristics** - Lists the characteristics of the payment tender. It contains the following columns:

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Column Name	Column Description
Characteristic Type	Indicates the characteristic type.
Characteristic Value	Displays the value of the characteristic type.

Note: This section appears when you are viewing the details of a payment creation request.

- **Record Actions** - This section contains the following buttons:

Column Name	Column Description
Edit	Used to edit the details of the payment request. **Note:** The **Edit** button appears when the payment request is in the **Draft** status.
Delete	Used to delete the payment request. **Note:** The **Delete** button appears when the payment request is in the **Draft** status.
Update Transfer Amount	Used to update the transfer amount. **Note:** The **Update Transfer Amount** button appears when the payment transfer request is in the **Draft** status. It is used for changing the transfer process from full to partial payment.
Update Tender Details	Used to update the tender details. **Note:** The **Update Tender Details** button appears when the payment transfer request is in the **Processed** status.
Distribute	Used to distribute the tender or payment amount. **Note:** The **Distribute** button appears when either the payment request or payment transfer request is in the **Draft** status.
Submit for Approval	Used to submit the payment request for approval. **Note:** The **Submit for Approval** button appears when the following conditions are met: • The payment request or payment transfer request is in the **Distributed** status. • The **Approval Required** option is selected in the payment request type using which the payment request is created.
Freeze	Used to freeze the payments which are created through the payment request. **Note:** The **Freeze** button appears when the following conditions are met: • The payment request or payment transfer request is in the **Distributed** status. • The **Approval Required** option is not selected in the payment request type using which the payment request is created.
Approve	Used to approve the payment request.

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Column Name	Column Description
	Note: The **Approve** button appears when the following conditions are met: • The payment request or payment transfer request is in the **Approval In Progress** status. • A user with the approval To Do role is reviewing the payment request.
Reject	Used to reject the payment request.
	Note: The **Reject** button appears when the following conditions are met: • The payment request or payment transfer request is in the **Approval In Progress** status. • A user with the approval To Do role is reviewing the payment request.
Back to Draft	Used to change the status of the payment creation or payment transfer request to **Draft**.
	Note: The **Back to Draft** button appears when the payment request or payment transfer request is in the **Distributed** status. On clicking the **Back to Draft** button, the system deletes the payments and payment segments which are created through the payment creation or transfer request.
Discard	Used to discard the payment creation or transfer request.
	Note: The **Discard** button appears when the payment request or payment transfer request is in the **Distributed** status. While discarding a payment creation request, the system does the following: • Deletes the payment event, payment tenders, payments, and payment segments created through the payment request. • Changes the status of the payment request to **Discarded**. However, while discarding a payment transfer request, the system does the following: • Deletes the payments and payment segments created through the payment request. • Unbalances the payment event. • Changes the status of the payment request to **Discarded**.
Distribute And Freeze	Used to distribute and freeze the payments at the same time.
	Note: The **Distribute And Freeze** button appears only when: • The payment request is created using the payment request type where the **Approval Required** option is not selected. • The payment request is in the **Draft** status.

- **Record Information** - This section contains the following fields:

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Field Name	Field Description
Business Object	Indicates the business object using which the payment request is created. In addition, a context menu appears corresponding to this field which helps in navigating to other screens in the application. **Note:** It has a link. On clicking the link, the **Business Object** screen appears where you can view the details of the respective business object.
Status Date/Time	Displays the date and time when the payment request status is updated.
Create Date/Time	Displays the date and time when the payment request is created.

- **Match Types** - Lists the match type details of the payment request. It contains the following columns:

Column Name	Column Description
Match Type	Indicates the type using which you want to match the payment.
Match By	Indicates the entity using which you want to match the payment. **Note:** For example, entities such as unpaid bills, unpaid bill segments, settlement IDs, or contracts are considered and verified to ensure the accuracy of the payment before the payment is actually made.

Note: This section appears when you are viewing the details of a payment creation request.

Related Topics

For more information on...	See...
How to create a payment request	Creating a Payment Creation Request on page 1497
How to create a payment transfer request	Creating a Payment Transfer Request on page 1543
How to edit a payment request	Editing a Payment Creation Request on page 1520
How to edit a payment transfer request	Editing a Payment Transfer Request on page 1548
How to delete a payment request	Deleting a Payment Creation or Transfer Request on page 1522
How to edit the payment amount against each entity	Editing the Payment Amount on page 1518
How to distribute the tender or payment amount	Distributing the Tender or Payment Amount on page 1522
How to freeze the payments created through a payment request	Freezing Payments Created Through a Payment Request on page 1529
How to approve a payment request	Approving a Payment Creation or Transfer Request on page 1531
How to reject a payment request	Rejecting a Payment Creation or Transfer Request on page 1532
How to edit the amount of a payment segment	Editing the Payment Segment Amount on page 1526
How to submit a payment request for approval	Submitting a Payment Creation or Transfer Request for Approval on page 1530

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For more information on...	See...
How to redistribute the tender or payment amount	Redistributing the Tender or Payment Amount on page 1525

Payment Details

The **Payment Details** zone lists the payments which are transferred through the payment request. This zone contains the following column:

Column Name	Column Description
Payment Information	Displays the concatenated string consisting of payment information which is separated by a comma (,). In addition, this column has a context menu (⌄) icon which helps in navigating to other screens in the application.
	Note: It has a link. On clicking the link, the **Payment** screen appears where you can view the details of the respective payment. This zone appears only when the following conditions are met: • Partial payment transfer is done at payment event level. • Full or partial payment transfer is done at payment level.

Payment Distribution

The **Payment Distribution** zone lists the payment distribution records of the payment request. This zone contains the following columns:

Column Name	Column Description
Match Type	Indicates the match type using which the payment is matched.
Payee Account ID	Indicates the account for which the payment is made.
	Note: It has a link. On clicking the link, the **Account** screen appears where you can view the details of the respective account.
Match Value	Indicates the entity (such as bill ID, bill segment ID, contract ID, or settlement ID) against which the payment is matched.
Match Entity	Indicates the type of entity against which the payment is matched. The valid values are: • Bill • Bill Segment • Contract • Settlement
Original Bill Amount	Displays the bill amount when the bill was generated.
	Note: In case of contract, the original bill amount would be zero.
Write Off Adjustment Amount	Indicates the amount which is either write up or down when the payment against the bill is within the tolerance limit.

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Column Name	Column Description
	Note: The data appears in this column when the match type is **Bill Weighted** and the payment amount is within the underpayment or overpayment tolerance limit. This column appears when the payment request is in the **Approval In Progress**, **Distributed**, or **Processed** status.
Paid Amount	Displays the amount of the bill which is already paid.
	Note: This column appears when the payment request is either in one of the following statuses: • Deferred Distribution • Discarded • Distribute and Freeze • Draft • Rejected
Unpaid Amount	Displays the amount which is eligible for payment.
	Note: This column appears when the payment request is either in one of the following statuses: • Deferred Distribution • Discarded • Distribute and Freeze • Draft • Rejected
Payment Amount	Displays the payment amount.
	Note: If you do not select the **Show Default** option against a match type while creating the payment request, the payment amount against the respective match type entities is set to zero. However, if the **Show Default** option is selected against a match type while creating the payment request, the payment amount appears against the respective match type entities. The tender amount is divided among the entities in the sequence of match types (where **Show Default** option is selected) followed by the sequence of bill, bill segment, or contract start date. You can edit the payment amount, if required.
Payment Currency	Indicates the currency in which the payment was made.
Payment ID	Displays the payment ID.

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Column Name	Column Description
	Note: It has a link. On clicking the link, the **Payment** screen appears with the details of the respective payment. This column appears when the payment request is in the **Approval In Progress**, **Distributed**, or **Processed** status.
Payment Status	Indicates the status of the payment. The valid values are: • Canceled • Error • Freezable • Frozen • Incomplete • Step in error • Step in process
	Note: This column appears when the payment request is in the **Approval In Progress**, **Distributed**, or **Processed** status. The list includes only those values which are defined in the **PAY_STATUS_FLG** lookup field.
Error Message	Indicates the reason why the payment is in the **Error** status.
	Note: This column appears when the payment request is in the **Approval In Progress**, **Distributed**, or **Processed** status.
Detail	On clicking the **Detail** button, the **Edit Payment Segment Amount** screen appears where you can edit the payment segment amount.
	Note: The **Detail** button appears when: • The payment request is in the **Distributed** or **Approval In Progress** status. • The payment is in the **Freezable** status. However, a user with the approval To Do role will not be able to edit the payment segment amount.
Redistribute	On clicking the **Redistribute** button, you can redistribute the payment amount among the payment segments using the payment distribution algorithm configured on the match type.
	Note: The **Redistribute** button appears when: • The payment request is in the **Distributed** status. • The payment is in the **Freezable** status.

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Column Name	Column Description
Payment Characteristics	On clicking the **Characteristic** button, the **Payment Characteristics** screen appears where you can add the payment characteristics.
	Note: The **Characteristic** button appears in the **Payment Characteristics** column when the payment request is in the **Distributed**, **Processed**, or **Approval In Progress** status.

Note:

You can edit the payment amount by clicking the **Update Payment Amount** link in the upper right corner of this zone.

The **Update Payment Amount** link appears when the payment creation or transfer request is either in the **Differed Distribution**, **Discarded**, **Distribute And Freeze**, **Draft**, or **Rejected** status.

Pagination is used to display limited number of records in the **Search Results** section. You can use the navigation links, such as **Previous** and **Next** to navigate between pages. Note that the navigation links appear in the **Search Results** section only when the records in the search results exceed 20.

You can filter the list using the **Match Type**, **Payee Account ID**, **Match Entity**, and **Payment Amount** field available in the **Filter** area. By default, the **Filter** area is hidden. You can view the **Filter** area by clicking the **Filters** (▽) icon in the upper right corner of this zone.

Related Topics

For more information on...	See...
How to edit the payment amount against each entity	Editing the Payment Amount on page 1518

Payment Request - Log

The **Log** tab contains the following zone:

- Payment Request Log on page 1517

Payment Request Log

The **Payment Request Log** zone lists the complete trail of actions performed on the payment request. It contains the following columns:

Column Name	Column Description
Creation Date Time	Displays the date and time when the action was performed on the payment request.
Details	Displays the details about the action performed on the payment request.
User	Indicates the user who has performed the action on the payment request.
Log Type	Indicates the type of log.
Related Object	Indicates the object or entity which is created when the action is performed on the payment request.
	Note: At present, no data appears in this column. The implementation team can build the custom logic to meet the business requirements.
Status Reason	Indicates the reason why the status of the payment request is changed.

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Column Name	Column Description
	Note: At present, no data appears in this column. The implementation team can build the custom logic to meet the business requirements.

Note: You can manually add a log entry for the payment request by clicking the **Add Log Entry** link in the upper right corner of the **Payment Request Log** zone.

Related Topics

For more information on...	See...
How to view the log of a payment creation or transfer request	Viewing the Log of a Payment Creation or Transfer Request on page 1535
How to add a log entry for a payment creation or transfer request	Adding a Log Entry for a Payment Creation or Transfer Request on page 1535

Editing the Payment Amount

Procedure

To edit the payment amount against each entity:

1. Search for a payment creation or transfer request in the **Payment Request** screen.
2. In the **Search Results** section, click the link in the **Payment Request Information** column corresponding to *t*he payment creation or transfer request whose details you want to edit.
   The **Payment Request** screen appears.
3. Ensure that the **Main** tab is selected.
4. In the **Payment Distribution** zone, click the **Update Payment Amount** link in the upper right corner of the zone.

   The **Payment Request - Edit Payment Amount** screen appears. It contains the following sections:

   - **Search Criteria** - The **Search Criteria** section contains the following fields:

Field Name	Field Description
Match Type	Used to search the entities which are considered using a particular match type.
	Note: By default, the **All** option is selected.
Sort By	Used to indicate an entity associated with the match type based on which the search result is sorted.
	Note: By default, the **All** option is selected.
Sort By	Used to indicate the field of a match type based on which the search result is sorted.

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Field Name	Field Description
	Note: By default, the **All** option is selected. The values appear in this list when you select an option from the **Match Type** list. The **Sort By** field contains the **DST.UNPAID_AMT** option which allows you to sort the records in the ascending and descending order of the unpaid amount. You can sort the records of the unpaid amount when the **Match Type** option is either selected as **Match by person - admin bills** or **Match by person - claim bills**.
Match Value	Used to search for a particular entity (such as, account, bill, person, or statement).
Order	Used to indicate the sequence for the search result. The valid values are: • Ascending • Descending
	Note: This field appears only when you have selected an option from the **Sort By** list corresponding to the **Match Value** field. By default, the **Descending** option is selected.

Note: This section also consists of a button, **Reset**, on clicking the button the payment amount of all the payments is set to zero(0).

- **Search Results** - On clicking the **Search** button, the search results are filtered based on the specified search criteria. The **Search Results** section contains the following columns:

Column Name	Column Description
Match Type	Indicates the match type.
Payee Information	Displays information about the account for which the payment is made.
Entity Information	Displays information about the entity against which the payment is matched.
Original Bill Amount	Displays the entity amount.
	Note: In case of contract, the entity amount would be zero (0).
Paid Amount	Displays the amount of the bill which is already paid.
Unpaid Amount	Displays the amount which is eligible for payment.
Payment Amount	Used to specify the total amount for which the payment should be made.

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Column Name	Column Description
	Note: If the **Allow Overpayment** option type of the **C1-PAYPORTAL** feature configuration is set to **true**, you can specify the payment amount greater than the unpaid amount. In other words, you can make overpayment against an entity. The sum of payment amount should be equal to the tender or transfer (payment) amount.
Payment Currency	Indicates the currency in which the payment is made.

In addition, the **Search Results** section contains the following fields:

Field Name	Field Description
Total Amount	Displays the tender or transfer amount.
Running Total	Displays the total payment amount which is specified against each entity.
Running Balance	Displays the difference between the total amount and running total.
	Note: The running balance is highlighted in the red color when the difference amount is non-zero.

Note:

Pagination is used to display limited number of records in the **Edit Payment Amount** screen. You can change the number of records displayed per page, if required. You can use the navigation buttons, such as **First** (<<), **Previous** (<), **Next** (>), and **Last** (>>) to navigate between pages.

You can also select the page to which you want to navigate from the **Go To** list.

5. Modify the payment amount against an entity, if required.
6. Click **Save**.
   The changes made in the payment amount are saved.
7. Click **Close**.
   The payment amount is updated in the **Payment Distribution** zone.

Related Topics

For more information on...	See...
How to search for a payment request	Searching for a Payment Request on page 1497
Payment Request screen	Payment Request (Used for Viewing) on page 1506
Payment Distribution zone	Payment Distribution on page 1514

Editing a Payment Creation Request

Procedure

To edit a payment creation request:

1. Search for the payment creation request in the **Payment Request** screen.

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2. In the **Search Results** section, click the link in the **Payment Request Information** column corresponding to *t*he payment creation request whose details you want to edit.
   The **Payment Request** screen appears.
3. Click the **Edit** button in the **Payment Request** zone.

   The **Payment Request** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details about the payment creation request.
   - **Tender Details** - Used to specify the tender details in the payment creation request.
   - **Characteristics** - Used to define the characteristics for the payment tender.
   - **Match Types** - Used to define match types for the payment creation request.

   The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Payment Request Information	Displays information about the payment creation request.	Not applicable
Payment Request Type	Indicates the payment request type using which the payment creation request is created.	Not applicable
Payor Account Information	Used to indicate the payor account for which you want to create the payment creation request. **Note:** The **Search** (🔍) icon appears corresponding to the **Payor Account Information** field. On clicking the **Search** icon, the **Account Search** screen appears. On specifying the payor account, the description of the payor account appears corresponding to the **Payor Account Information** field.	Yes
Payment Date	Used to specify the date when the payment is made. **Note:** You can either manually specify the date or select it using the **Date Picker** (📅) icon corresponding to the field.	Yes

Note: The **Edit** button appears only when the payment creation request is in the **Draft** status.

4. Modify the required details in the **Main** section, if required.

Note:

You can search for a payor account, auto pay route type, auto pay source, and entity by clicking the **Search** (🔍) icon corresponding to the respective field.

5. Modify the tender details, if required.
6. Define, edit, or remove characteristics of the payment creation request, if required.
7. Define, edit, or remove the match types from the payment creation request, if required.
8. Click **Manual Distribution**.
   The changes made to the payment creation request are saved.

Note: Depending on the information specified in the **Match Types** section, the entities are listed in the **Payment Distribution** zone. You can edit the payment amount against each entity, if required.

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Related Topics

For more information on...	See...
How to search for a payment request	Searching for a Payment Request on page 1497
Payment Request screen	Payment Request (Used for Viewing) on page 1506
Payment Request zone	Payment Request on page 1507
Payment Details zone	Payment Details on page 1514
Payment Distribution zone	Payment Distribution on page 1514
How to define a characteristic for a payment tender	Defining a Characteristic for a Payment Tender on page 1503
How to add the tender details in a payment creation request	Adding the Tender Details in a Payment Creation Request on page 1499
How to define the match types for a payment creation request	Defining a Match Type in a Payment Creation Request on page 1503

Deleting a Payment Creation or Transfer Request

Procedure

To delete a payment creation or transfer request:

1. Search for the payment creation or transfer request in the **Payment Request** screen.
2. In the **Search Results** section, click the link in the **Payment Request Information** column corresponding to *t*he payment creation or transfer request that you want to delete.
   The **Payment Request** screen appears.
3. Click the **Delete** button in the **Payment Request** zone.
   A message appears confirming whether you want to delete the payment creation or transfer request.

> **Note:** The **Delete** button appears when the payment creation or transfer request is in the **Draft** status.

4. Click **OK**.
   The payment creation or transfer request is deleted.

Related Topics

For more information on...	See...
How to search for a payment request	Searching for a Payment Request on page 1497
Payment Request screen	Payment Request (Used for Viewing) on page 1506
Payment Request zone	Payment Request on page 1507

Distributing the Tender or Payment Amount

Procedure

To distribute the tender or payment amount:

1. Search for the payment request in the **Payment Request** screen.

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2. In the **Search Results** section, click the link in the **Payment Request Information** column corresponding to *t*he payment request whose tender or payment amount you want to distribute.
   The **Payment Request** screen appears.
3. Click the **Distribute** button in the **Payment Request** zone.

Note:

The defer algorithm attached to the payment request type (using which you have created the payment request) is triggered. This algorithm checks whether the number of payment distribution records in the payment request exceeds the payment count defined in the defer algorithm. If the number of payment distribution records in the payment request does not exceed the payment count, the system distributes the tender or payment amount in real time (i.e. immediately). However, if the number of payment distribution records in the payment request exceeds the payment count, the system distributes the tender or payment amount in the deferred mode. This algorithm calculates the number of records to be processed for the account in the following manner:

Number of payment distribution records =

(Number of bill segments present in each bill fetched using the bill weighted, bill regular, and bill match type algorithm) +

(Number of bill segments fetched using the bill segment match type algorithm) +

(Number of contracts fetched using the suspense contract match type algorithm) +

(Number of settlements fetched using the settlement match type algorithm)

Deferred mode means in the background when the **Payment Request Periodic Monitor (C1-PAYRQ)** batch is invoked. You can configure the **Payment Request Periodic Monitor (C1-PAYRQ)** batch such that it is executed at regular intervals. When the **Payment Request Periodic Monitor (C1-PAYRQ)** batch is invoked, the system checks whether there are any payment requests in the **Deferred Distribution** status. If there is a payment request in the **Deferred Distribution** status, the system distributes the tender or payment amount.

On distributing the tender amount, the payment event, payments, payment segments, and payment tenders are created. The payments are created in the **Freezable** status. If any error occurs while creating the payment, the payment is created in the **Error** status. If all payments of a payment event are in the **Freezable** status, the status of the payment event is set to **Balanced**.

However, if any payment of a payment event is in the **Error** status, the status of the payment event is set to **Unbalanced**. On distributing the payment amount (during transfer), the new payments are created in the **Freezable** status. If any error occurs while creating the new payment, the payment is created in the **Error** status. The status of the payment event is set to **Unbalanced**. The older payments in the payment event that you want to transfer remain in the **Frozen** or **Error** status. Once the tender or payment amount is successfully distributed, the status of the payment request is changed to **Distributed**.

Note:

The **Distribute** button appears when the payment request is in the **Draft** status.

The system will not allow you to distribute the tender or payment amount if the sum of payment amount is not equal to the tender or transfer (payment) amount.

Related Topics

For more information on...	**See...**
How to search for a payment request	Searching for a Payment Request on page 1497
Payment Request screen	Payment Request (Used for Viewing) on page 1506
Payment Request zone	Payment Request on page 1507

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For more information on...	See...
How to edit the payment amount against each entity	Editing the Payment Amount on page 1518

Distributing and Freezing the Tender or Payment Amount

Procedure

To distribute and freeze the tender or payment amount:

1. Search for the payment request in the **Payment Request** screen.
2. In the **Search Results** section, click the link in the **Payment Request Information** column corresponding to *t*he payment request whose tender or payment amount you want to distribute and freeze.
   The **Payment Request** screen appears.
3. Click the **Distribute And Freeze** button in the **Payment Request** zone.

Note:

The defer algorithm attached to the payment request type using which you have created the payment request is triggered. This algorithm checks whether the number of payment distribution records in the payment request exceeds the payment count defined in the defer algorithm. If the number of payment distribution records in the payment request does not exceed the payment count, the system distributes and freezes the tender or payment amount in real time (i.e. immediately). However, if the number of payment distribution records in the payment request exceeds the payment count, the system distributes and freezes the tender or payment amount in the deferred mode. This algorithm calculates the number of records to be processed for the account in the following manner:

Number of payment distribution records =

(Number of bill segments present in each bill fetched using the bill weighted, bill regular, and bill match type algorithm) +

(Number of bill segments fetched using the bill segment match type algorithm) +

(Number of contracts fetched using the suspense contract match type algorithm) +

(Number of settlements fetched using the settlement match type algorithm)

Deferred mode means in the background when the **Payment Request Periodic Monitor (C1-PAYRQ)** batch is invoked. You can configure the **Payment Request Periodic Monitor (C1-PAYRQ)** batch such that it is executed at regular intervals. When the **Payment Request Periodic Monitor (C1-PAYRQ)** batch is invoked, the system checks whether there are any payment requests in the **Deferred Distribution** status. If there is a payment request in the **Deferred Distribution** status, the system distributes the tender or payment amount.

On distributing and freezing the tender amount, the payment event, payments, payment segments, and payment tenders are created. The payments are created in the **Frozen** status. If any error occurs while creating the payment, the payment is created in the **Error** status. If all payments of a payment event are in the **Frozen** status, the status of the payment event is set to **Balanced**.

However, if any payment of a payment event is in the **Error** status, the status of the payment event is set to **Unbalanced**. On distributing the payment amount (during transfer), the new payments are created in the **Frozen** status. If any error occurs while creating the new payment, the payment is created in the **Error** status. The status of the payment event is set to **Unbalanced**. The old payments in the payment event that you want to transfer remains in the **Frozen** or **Error** status. Once the tender or payment amount is successfully distributed and frozen, the status of the payment request is changed to **Processed**.

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Note:

The **Distribute And Freeze** button appears when the payment request is in the **Draft** status.

The system will not allow you to distribute the tender or payment amount if the sum of payment amount is not equal to the tender or transfer (payment) amount.

Related Topics

For more information on...	See...
How to search for a payment request	Searching for a Payment Request on page 1497
Payment Request screen	Payment Request (Used for Viewing) on page 1506
Payment Request zone	Payment Request on page 1507
How to edit the payment amount against each entity	Editing the Payment Amount on page 1518

Redistributing the Tender or Payment Amount

Procedure

To redistribute the tender or payment amount:

1. Search for the payment request in the **Payment Request** screen.
2. In the **Search Results** section, click the link in the **Payment Request Information** column corresponding to *t*he payment request whose tender or payment amount you want to redistribute.
   The **Payment Request** screen appears.
3. In the **Payment Distribution** zone, click the **Redistribute** button in the **Redistribute** column corresponding to *t*he payment distribution whose tender or payment amount you want to redistribute.
   The payment amount gets redistributed among the payment segments using the payment distribution algorithm configured on the match type.

Note: The **Redistribute** button appears when the payment request is in the **Distributed** status, and the respective payment is in the **Freezable** status.

Related Topics

For more information on...	See...
How to search for a payment request	Searching for a Payment Request on page 1497
Payment Request screen	Payment Request (Used for Viewing) on page 1506
Payment Request zone	Payment Request on page 1507
How to edit the payment amount against each entity	Editing the Payment Amount on page 1518

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Editing the Payment Segment Amount

Before you freeze the payments, the system allows you to edit the payment segment amount of the payments which are in the **Freezable** status. You can edit the payment segment amount only when multiple payment segments are present in a payment.

Procedure

To edit the payment segment amount:

1. Search for the payment request in the **Payment Request** screen.
2. In the **Search Results** section, click the link in the **Payment Request Information** column corresponding to *t*he payment request whose details you want to edit.
   The **Payment Request** screen appears.
3. Click the **Detail** button in the **Payment Distribution** zone.

   The **Edit Payment Segment Amount** screen appears. It contains the following fields:

Field Name	Field Description
Payment Event Information	Displays information about the payment event which is created through the payment request.
Payment Information	Displays information about the payment which is created through the payment event.
Payee Account Information	Displays information about the account for which the payment is made.
Match Value	Displays information about the entity against which the payment is matched.
Payment Amount	Displays the total payment amount.
Running Total	Displays the sum of the payment amount specified against each payment segment.
Running Balance	Displays the difference between the payment amount and running total. **Note:** The running balance is highlighted in the red color when the difference amount is non-zero.

   In addition to the above fields, this section contains the following columns:

Column Name	Column Description	Mandatory (Yes or No)
Sr No	Indicates the sequence number of the payment segment.	Not applicable
Entity Information	Displays information about the entity (such as, bill segment or contract) against which the payment segment is created.	Not applicable
Total Amount	Displays the entity amount. **Note:** If the payment segment is created against a contract, the system considers all the bill segments of the bill which are created against the contract and calculates the total bill segment amount.	Not applicable
Unpaid Amount	Displays the amount which is eligible for payment.	Not applicable

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Column Name	Column Description	Mandatory (Yes or No)
	Note: If the payment segment is created against a contract, the system considers all the bill segments of the bill which are created against the contract and calculates the total unpaid bill segment amount.	
Payment Amount	Used to specify the payment amount that you want to distribute against the payment segment. **Note:** This field is appears read-only when: • There is only one payment segment in a payment. • A user with the approval To Do role is reviewing the payment segment amount.	Yes
Payment Currency	Indicates the currency in which the payment was made.	Not applicable
Pay Segment ID	Displays the payment segment ID.	Not applicable

Note:

The **Detail** button appears in the **Detail** column when:

- The payment request is in the **Distributed** or **Approval In Progress** status.
- The payment is in the **Freezable** status.

Pagination is used to display limited number of records in the **Edit Payment Segment Amount** screen. You can change the number of records displayed per page, if required. You can use the navigation buttons, such as **First** (<<), **Previous** (<), **Next** (>), and**Last** (>>) to navigate between pages. You can also select the page to which you want to navigate from the **Go To** list.

4. Modify the payment amount against a pay segment, if required.

Note: The sum of the payment segment amount should be equal to the payment amount.

5. Click **Redistribute**.
   The payment amount is redistributed among the payment segments.

Note: If the **Payment Amount** field appears as read-only, then the **Redistribute** button is disabled.

6. Click **Close**.
   The changes made to the payment segment amount are saved.

Related Topics

For more information on...	See...
How to search for a payment request	Searching for a Payment Request on page 1497
Payment Request screen	Payment Request (Used for Viewing) on page 1506
Payment Distribution zone	Payment Distribution on page 1514

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Defining a Characteristic for a Payment Creation or Transfer Request

Prerequisites

To define a characteristic for a payment tender, you should have:

- Characteristic types defined in the application (where the characteristic entity is set to **Payment Tender**).

Procedure

To define a characteristic for a payment creation or transfer request:

1. Search for the payment creation or transfer request in the **Payment Request** screen.
2. In the **Search Results** section, click the link in the **Payment Request Information** column corresponding to *t*he payment creation or transfer request whose details you want to view.

   The **Payment Request** screen appears.
3. Click the **Characteristic** button in the **Payment Distribution** zone.
   The **Payment Characteristics** screen appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Payment Event Information	Displays information about the payment event which is created through the payment request.	Not applicable
Payment Information	Displays information about the payment which is created through the payment event.	Not applicable

In addition to the above fields, this section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Sequence	Used to specify the sequence number for the characteristic.	Yes (Conditional)
	Note: The sequence cannot be less than or equal to zero.	**Note:** This field is required when you are defining a characteristic for the payment creation or transfer request.
Characteristic Type	Used to indicate the characteristic type.	Yes (Conditional)
	Note: The list includes only those characteristic types where the characteristic entity is set to **Payment Tender**.	**Note:** This field is required when you are defining a characteristic for the payment creation or transfer request.
Characteristic Value	Used to specify the value for the characteristic type.	Yes (Conditional)

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Field Name	Field Description	Mandatory (Yes or No)
	Note: If you select a predefined characteristic type, the **Search** (🔍) icon appears corresponding to the **Characteristic Value** field. On clicking the **Search** icon, you can search for a predefined characteristic value. On specifying the value for a predefined characteristic type, the description of the characteristic value appears corresponding to the **Characteristic Value** field.	**Note:** This field is required when you are defining a characteristic for the payment creation or transfer request.

4. Enter the required details.
5. If you want to define more than one characteristic for the payment creation or transfer request, click the **Add** (+) icon and then *r*epeat step 4.

> **Note:** However, if you want to remove a characteristic from the payment creation or transfer request, click the **Delete** (🗑) icon corresponding to the characteristic.

6. Click **Save**.
   The changes made to the payment characteristics are saved.

> **Note:**
>
> The **Characteristic** button appears in the **Payment Characteristic** column when:
>
> - The payment creation or transfer request is in the **Distributed** or **Approval In Progress** status.
> - The payment is in the **Freezable** status.

Related Topics

For more information on...	See...
Payment Request screen	Payment Request (Used for Searching) on page 1493
Payment Request screen	Payment Request (Used for Viewing) on page 1506

Freezing Payments Created Through a Payment Request

Procedure

To freeze the payments created through a payment request:

1. Search for the payment request in the **Payment Request** screen.
2. In the **Search Results** section, click the link in the **Payment Request Information** column corresponding to *t*he payment request whose payments you want to freeze.
   The **Payment Request** screen appears.

> **Note:** Before freezing the payments, if required, you can edit the amount of a payment segment.

3. Click the **Freeze** button in the **Payment Request** zone.

   The system behaves in the following manner:

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If you are...	Then
Freezing the payments created through a payment creation request	The status of the payments which are in the **Freezable** status is changed to **Frozen**. In addition, the status of the payment request is changed to **Processed**.
Freezing the payments created through a payment transfer request	The status of the old payments which are in the **Frozen** status is changed to **Canceled**. The old payments which are in the **Error** status are deleted. The status of the new payments which are in the **Freezable** status is changed to **Frozen**. The status of the payment event is changed to **Balanced** if there are no new payments in the **Error** status. In addition, the status of the payment request is changed to **Processed**.

Note:

The **Freeze** button appears when:

- The payment request is in the **Distributed** status.
- The **Approval Required** option is not selected in the payment request type for the respective payment request.

The system will not allow you to freeze the payments which are created through the payment request if the sum of payment segment amount is not equal to the payment amount for each payment.

Related Topics

For more information on...	See...
How to search for a payment request	Searching for a Payment Request on page 1497
Payment Request screen	Payment Request (Used for Viewing) on page 1506
Payment Request zone	Payment Request on page 1507
How to edit the amount of a payment segment	Editing the Payment Segment Amount on page 1526

Submitting a Payment Creation or Transfer Request for Approval

Procedure

To submit a payment creation or transfer request for approval:

1. Search for the payment creation or transfer request in the **Payment Request** screen.
2. In the **Search Results** section, click the link in the **Payment Request Information** column corresponding to *t*he payment creation or transfer request that you want to submit for approval.
   The **Payment Request** screen appears.

   Note: Before submitting the payment creation or transfer request for approval, if required, you can edit the amount of a payment segment.
3. Click the **Submit for Approval** button in the **Payment Request** zone.
   The status of the payment creation or transfer request is changed to **Approval In Progress**. A To Do is created using the To Do type (i.e. **C1-PAYRQ**) specified in the **Approval To Do Type** field of the respective payment creation or transfer request type and then assigned to the users with the role specified in the **Approval To Do Role** field of the respective payment creation or transfer request type.

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Note:

The **Submit for Approval** button appears when:

- The payment creation or transfer request is in the **Distributed** status.
- The **Approval Required** option is selected in the payment request type for the respective payment creation or transfer request.

The system will not allow you to submit the payment creation or transfer request for approval if the sum of payment segment amount is not equal to the payment amount for each payment.

Related Topics

For more information on...	See...
How to search for a payment request	Searching for a Payment Request on page 1497
Payment Request screen	Payment Request (Used for Viewing) on page 1506
Payment Request zone	Payment Request on page 1507
How to edit the amount of a payment segment	Editing the Payment Segment Amount on page 1526

Approving a Payment Creation or Transfer Request

You can view the number of payment creation or transfer requests which are pending for approval in the **Payment Request** screen. The approver can review, and accordingly approve or reject the payment creation or transfer request based on the observations.

Note: The system will not allow you to approve or reject a payment creation or transfer request submitted by you.

To approve a payment creation or transfer request, you should have:

- Required approval To Do role assigned in the system.

Procedure

To approve a payment creation or transfer request:

1. Do either of the following:

If you want to...	Then...
Approve a payment creation or transfer request through the Payment Request screen	**a.** Search for the payment creation or transfer request in the **Payment Request** screen. **b.** In the **Search Results** section, click the link in the **Payment Request Information** column corresponding to the payment creation or transfer request which you want to review.
Approve a payment creation or transfer request from the To Do List screen	**a.** Click the **Menu** link in the **Application** toolbar. A list appears. **b.** From the **Main** menu, select **To Do** and then click **To Do List**. The **To Do List** screen appears. **c.** In the **To Do List** screen, click the **Search** (🔍) icon corresponding to the **To Do Type** field. On clicking the **Search** icon, the **To Do Type for User Search** window appears.

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If you want to...	Then...
	d. Enter **C1-PAYRQ** in the **To Do Type** field. **e.** Click the **Search** button corresponding to the **To Do Type** field. The **To Do List** screen appears. **f.** Select the **Open** option from the **Filter by** list to view all the unassigned To Dos. **g.** Click the link in the **Message** column corresponding to the To Do of the payment creation or transfer request that you want to review.

The **Payment Request** screen appears.

2. Review the payment creation or transfer request details.
3. Click the **Approve** button in the **Payment Request** zone.

The system behaves in the following manner:

If you are...	Then...
Approving a payment creation request	The status of the payments which are in the **Freezable** status is changed to **Frozen**. In addition, the status of the payment creation request is changed to **Processed**.
Approving a payment transfer request	The status of the old payments which are in the **Frozen** status is changed to **Canceled**. The old payments which are in the **Error** status are deleted. The status of the new payments which are in the **Freezable** status is changed to **Frozen**. The status of the payment event is changed to **Balanced** when there are no new payments in the **Error** status. In addition, the status of the payment transfer request is changed to **Processed**.

Note:

The **Approve** button appears when:

- The payment creation or transfer request is in the **Approval In Progress** status.
- A user with the approval To Do role is reviewing the payment creation or transfer request.

Related Topics

For more information on...	See...
How to search for a payment request	Searching for a Payment Request on page 1497
Payment Request screen	Payment Request (Used for Viewing) on page 1506
Payment Request zone	Payment Request on page 1507

Rejecting a Payment Creation or Transfer Request

Prerequisites

To reject a payment creation or transfer request, you should have:

- Rejection reasons defined in the application.

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Note:

While rejecting a payment creation or transfer request, you need to specify the reason why you want to reject the payment creation or transfer request. If you are rejecting a payment creation request, you can select the appropriate rejection reason when you have defined the reasons for the **Rejected** status of the **C1-PaymentRequest** business object in the **Status Reason** screen. However, if you are rejecting a payment transfer request, you can select the appropriate rejection reason when you have defined the reasons for the **Rejected** status of the **C1-PaymentTransferRequest** business object in the **Status Reason** screen.

The system will not allow you to approve or reject a payment creation or transfer request submitted by you.

Procedure

To reject a payment creation or transfer request:

1. Do either of the following:

If you want to...	Then...
Reject a payment creation or transfer request through the Payment Request screen	**a.** Search for the payment creation or transfer request in the **Payment Request** screen. **b.** In the **Search Results** section, click the link in the **Payment Request Information** column corresponding to the payment creation or transfer request which you want to review.
Reject a payment creation or transfer request from the To Do List screen	**a.** Click the **Menu** link in the **Application** toolbar. A list appears. **b.** From the **Main** menu, select **To Do** and then click **To Do List**. The **To Do List** screen appears. **c.** In the **To Do List** screen, click the **Search** (🔍) icon corresponding to the **To Do Type** field. On clicking the **Search** icon, the **To Do Type for User Search** window appears. **d.** Enter **C1-PAYRQ** in the **To Do Type** field. **e.** Click the **Search** button corresponding to the **To Do Type** field. The **To Do List** screen appears. **f.** Select the **Open** option from the **Filter by** list to view all unassigned To Dos. **g.** Click the link in the **Message** column corresponding to the To Do of the payment creation or transfer request that you want to review.

   The **Payment Request** screen appears.
2. Review the payment creation or transfer request details.
3. If required, you can review the payment segment amount of each payment by clicking the **Detail** button in the **Detail** column corresponding to the respective payment in the **Payment Distribution** zone.
4. Click the **Reject** button in the **Payment Request** zone.

   The **Status Reason** window appears. It contains following fields:

Field Name	Field Description	Mandatory (Yes or No)
Status Reason	Used to indicate the reason why you want to reject the payment creation or transfer request.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	Note: If you are rejecting the payment creation request, this list includes only those reasons which are defined for the **Rejected** status of the **C1-PaymentRequest** business object through the **Status Reason** screen. If you are rejecting the payment transfer request, this list includes only those reasons which are defined for the **Rejected** status of the **C1-PaymentTransferRequest** business object through the **Status Reason** screen.	
Comments	Used to specify additional information while rejecting the payment creation or transfer request. **Note:** You can resize the text box depending on your requirement by clicking the **Resize Handle** (⇲) icon at the bottom right corner of the text box.	

Note: The **Reject** button appears when:

- The payment creation or transfer request is in the **Approval In Progress** status.
- A user with the approval To Do role is reviewing the payment creation or transfer request.

5. Select the rejection reason from the **Status Reason** list.
6. Click **Save**.
   If the approver rejects the payment creation request, payment event, payments, payment segments, and payment tender which are created through the payment creation request are deleted. However, if the approver rejects the payment transfer request, new payments which are created through the payment transfer request are deleted. In addition, the status of the payment creation or transfer request is changed to **Rejected**.

Related Topics

For more information on...	See...
How to search for a payment request	Searching for a Payment Request on page 1497
Payment Request screen	Payment Request (Used for Viewing) on page 1506
Payment Request zone	Payment Request on page 1507

Discarding a Payment Creation or Transfer Request

1. Search for the payment creation or transfer request in the **Payment Request** screen.
2. In the **Search Results** section, click the link in the **Payment Request Information** column corresponding to *t*he payment creation or transfer request which you want to discard.
3. Click the **Discard** button in the **Payment Request** zone.

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Note:

The **Discard** button appears only when the payment creation or transfer request is in the **Distributed** status.

If the approver discards a payment creation request, payment event, payments, payment segments, and payment tender which are created through the payment creation request are deleted. However, if the approver discards a payment transfer request, the new payments which are created through the payment transfer request are deleted. In addition, the status of the payment creation or transfer request is changed to **Discarded**.

Discarding a payment creation or transfer request is similar to rejecting a payment creation or transfer request. However, you can only reject a payment creation or transfer request, when the approval workflow is on while creating a payment creation or transfer request, but discarding a payment creation or transfer request can be done in both the cases, when the approval workflow is on or off.

Related Topics

For more information on...	See...
How to search for a payment request	Searching for a Payment Request on page 1497
Payment Request screen	Payment Request (Used for Viewing) on page 1506
Payment Request zone	Payment Request on page 1507

Viewing the Log of a Payment Creation or Transfer Request

Procedure

To view the log of a payment creation or transfer request:

1. Search for the payment creation or transfer request in the **Payment Request** screen.
2. In the **Search Results** section, click the link in the **Payment Request Information** column corresponding to *t*he payment creation or transfer request whose log you want to view.
   The **Payment Request** screen appears.
3. Click the **Log** tab.
   The **Log** tab appears.
4. View the complete trail of actions performed on the payment request in the **Payment Request Log** zone.

Related Topics

For more information on...	See...
How to search for a payment request	Searching for a Payment Request on page 1497
Payment Request screen	Payment Request (Used for Viewing) on page 1506
Payment Request zone	Payment Request on page 1507
How to add a log entry for a payment request	Adding a Log Entry for a Payment Creation or Transfer Request on page 1535

Adding a Log Entry for a Payment Creation or Transfer Request

Procedure

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To add a log entry for a payment creation or transfer request:

1. Search for the payment creation or transfer request in the **Payment Request** screen.
2. In the **Search Results** section, click the link in the **Payment Request Information** column corresponding to *t*he payment creation or transfer request whose log you want to edit.
   The **Payment Request** screen appears.
3. Click the **Log** tab.
   The **Log** tab appears.
4. Click the **Add Log Entry** link in the upper right corner of the **Payment Request Log** zone.

   The **Add Payment Request Log** window appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Payment Request Information	Displays information about the payment creation or transfer request.	Not applicable
Log Details	Used to specify additional comments for the payment creation or transfer request.	Yes
	Note: You can resize the text box depending on your requirement by clicking the **Resize Handle** (⇲) icon at the bottom right corner of the text box.	

5. Enter the comments in the **Log Details** field.
6. Click **Save**.
   The log entry is added in the **Payment Request Log** zone.

Related Topics

For more information on...	See...
How to search for a payment request	Searching for a Payment Request on page 1497
Payment Request screen	Payment Request (Used for Viewing) on page 1506
Payment Request zone	Payment Request on page 1507

Payment Event Summary

The **Payment Event Summary** screen allows you to search for a payment event using various search criteria. Through this screen, you can:

- View the payments created through a payment event.
- View payment segments of a payment.
- Transfer one or more payments of a payment event to another payee account.
- Cancel a payment event.
- Delete a payment event.
- Cancel a payment of a payment event.
- Delete a payment of a payment event.
- Refund a payment which is matched against the suspense or excess credit contract.

This screen consists of following zones:

- Search Payment Event on page 1537
- Payments on page 1540

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- Payment Segments on page 1542

Search Payment Event

The **Search Payment Event** zone allows you to search for a payment event using various search criteria. This zone contains the following two sections:

- **Search Criteria** - The **Search Criteria** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Search By	Used to indicate whether you want to search for a payment event using the payor account, payment event, tender, or contract details. The valid values are: • Payor Account/Payment Event • Tender Details • Suspense/Excess Credit Contract **Note:** By default, the **Payor Account/Payment Event** option is selected.	Yes
Payment Event ID	Used to search for a particular payment event. **Note:** The **Search** (🔍) icon appears corresponding to the **Payment Event ID** field. On clicking the **Search** icon, the **Payment Event Search** window appears. This field appears when you select the **Payor Account/ Payment Event** option from the **Search By** list.	No
Payor Account ID	Used to search for payment events which are created for a particular payor account. **Note:** The **Search** (🔍) icon appears corresponding to the **Payor Account ID** field. On clicking the **Search** icon, the **Account Search** window appears. This field appears when you select the **Payor Account/ Payment Event** option from the **Search By** list.	No
Payment Date	Used to search for payment events which are created for a particular payment date. **Note:** You can either manually specify the date or select it using the **Date Picker** (📅) icon corresponding to the field. This field appears when you select the **Payor Account/ Payment Event** option from the **Search By** list.	No

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Field Name	Field Description	Mandatory (Yes or No)
Payor Name	Used to search for payment events which are created for a particular payor. **Note:** This field appears when you select the **Payor Account/Payment Event** option from the **Search By** list.	No
Tender Type	Used to search for payment events which are created using a particular tender type. **Note:** This field appears when you select the **Tender Details** option from the **Search By** list.	No
MICR ID	Used to search for payment events which include the payments that are made using a particular MICR code. **Note:** This field appears when you select the **Tender Details** option from the **Search By** list.	No
Check Number	Used to search for payment events which include payments that are made through a particular check number. **Note:** This field appears when you select the **Tender Details** option from the **Search By** list.	No
External Reference ID	Used to search for payment events which include payments that are made through a particular external reference id. **Note:** This field appears when you select the **Tender Details** option from the **Search By** list.	No
Payment Date From	Used to search for payment events which are created from a particular date onwards. **Note:** You can either manually specify the date or select it using the **Date Picker** ( ) icon corresponding to the field. This field appears when you select the **Tender Details** option from the **Search By** list. The payment date from date cannot be later than the payment date to date.	Yes (Conditional) **Note:** This field is required when the search criteria is specified in the **Payment Date To** field.
Payment Date To	Used to search for payment events which are created till a particular date.	Yes (Conditional)

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Field Name	Field Description	Mandatory (Yes or No)
	Note: You can either manually specify the date or select it using the **Date Picker** ( ) icon corresponding to the field. This field appears when you select the **Tender Details** option from the **Search By** list. The payment date to date cannot be earlier than the payment date from date.	**Note:** This field is required when the search criteria is specified in the **Payment Date From** field.
Characteristic Type	Used to search for payment events where a particular characteristic type is used.	No
Contract ID	Used to search for payment events which include payments made against a particular suspense or excess credit contract. **Note:** The **Search** () icon appears corresponding to the **Contract ID** field. On clicking the **Search** icon, the **Contract Search** window appears. This field appears when you select the **Suspense/Excess Credit Contract** option from the **Search By** list.	No

Note: You must specify at least one search criterion while searching for a payment event.

- **Search Results** - On clicking the **Search** button, the search results appear based on the specified search criteria. The **Search Results** section contains the following columns:

Column Name	Column Description
Payment Event Information	Displays additional information about the payment event. **Note:** It has a link. On clicking the link, the **Payment Event** screen appears where you can view the details of the respective payment event.
Transfer	On clicking the **Transfer** button, you can transfer all the payments of the payment event (which are in the **Frozen**, **Canceled**, or **Error** status) to another payee account. **Note:** The **Transfer** button appears when: • One or more payments of the payment event are in the **Frozen**, **Canceled**, or **Error** status. • There is no payment transfer request which is currently in progress for the payment event.
Cancel	On clicking the **Tender Cancel** link, the **Payment Event** screen appears where you can cancel all the payments of the payment event.

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Column Name	Column Description
	Note: The **Tender Cancel** link appears when: • One or more payments of the payment event are in the **Frozen** status. • One or more payments of the payment event are not in the **Freezable** or **Error** status. • There is no payment transfer request which is currently in progress for the payment event.
Delete	On clicking the **Delete** button, you can delete the payment event.
	Note: The **Delete** button appears when the payments of a payment event are in the **Freezable**, **Error** or **Incomplete** status.
Additional Information	Displays information about the status of the payment event.
Payment Date	Displays the date when the payment was made.
Payor Name	Indicates the person who has made the payment.
	Note: It has a link. On clicking the link, the **Person** screen appears where you can view the details of the respective person.
Payor Account ID	Indicates the account which made the payment.
	Note: It has a link. On clicking the link, the **Account** screen appears where you can view the details of the respective account.
Tender Amount	Displays the tender amount.
Payment Event ID	Displays the payment event ID.

Related Topics

For more information on...	See...
How to search for a payment event	Searching for a Payment Event on page 1543
How to transfer payments of a payment event	Creating a Payment Transfer Request on page 1543
How to cancel a payment event	Canceling a Payment Tender on page 1551
How to delete a payment event	Deleting a Payment Event on page 1553

Payments

The **Payments** zone lists all payments created through the payment event. This zone contains the following columns:

Column Name	Column Description
Payment ID	Displays the payment ID.

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Column Name	Column Description
	Note: It has a link. On clicking the link, the **Payment** screen appears with the details of the respective payment.
Payee Account Information	Displays information about the payee account for which the payment was made. In addition, this column has a context menu (⊙) icon which helps in navigating to other screens in the application.
	Note: It has a link. On clicking the link, the **Account** screen appears with the details of the respective payee account.
Payment Amount	Displays the amount paid through the tender.
Payment Currency	Indicates the currency in which the payment was made.
Payment Status	Indicates the status of the payment. The valid values are: • Canceled • Error • Freezable • Frozen • Incomplete • Step in error • Step in process
	Note: The list includes only those values which are defined in the **PAY_STATUS_FLG** lookup field.
Match Type	Indicates the match type using which the payment was matched.
Match Value	Indicates the entity (such as bill, bill segment, or contract) against which the payment was matched.
Error Message	Indicates the reason why the payment is in the **Error** status.
Payor Account ID	Indicates the payor account which made the payment.
Refund Amount	Displays the amount which is already refunded to the payor account.

In addition, this zone contains the following buttons:

Button Name	Button Description
Transfer	Used to transfer the payment to another payee account.
	Note: You can transfer a payment when it is in the **Frozen** or **Error** status.
Cancel	Used to cancel the payment.
	Note: You can cancel a payment when it is in the **Frozen** status.
Delete	Used to delete the payment.
	Note: You can delete a payment when it is in the **Freezable** or **Error** status.
Refund	Used to refund the payment amount to the payor account.

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Button Name	Button Description
	Note: You can refund the payment amount to the payor account when: • The payment is matched against the suspense or excess credit contract. • The payment is in the **Frozen** status.

Note:

A check box appears corresponding to each payment record. To perform a transfer, select the check box corresponding to the payment record and then click the **Transfer** button. Simultaneously, you can perform the same steps for payment cancelation, payment deletion, and payment refund. You can also select multiple payment records at the same time. In addition, you can select the check box corresponding to the column header.

You can filter the list using the **Payee Account ID**, **Payee Name**, **Payment Status**, and **Payment Amount** fields available in the **Filter** area. By default, the **Filter** area is hidden. You can view the **Filter** area by clicking the **Filters** (▽) icon in the upper right corner of this zone.

Related Topics

For more information on...	See...
How to view payments created through a payment event	Viewing Payments Created Through a Payment Event on page 1553
How to cancel a payment	Canceling a Payment on page 1553
How to delete a payment	Deleting a Payment on page 1554
How to transfer a payment	Creating a Payment Transfer Request on page 1543
How to refund a payment	Creating a Refund Request on page 1774

Payment Segments

The **Payment Segments** zone lists payment segments of a payment. This zone contains the following columns:

Column Name	Column Description
Pay Segment ID	Displays the payment segment ID. **Note:** It has a link. On clicking the link, the **Pay Segments** tab of the **Payment** screen appears where you view the details of the payment segment.
Contract Information	Displays information about the contract against which the payment segment is created. In addition, this column has a context menu (⊙) icon which helps in navigating to other screens in the application. **Note:** It has a link. On clicking the link, the **Contract** screen appears where you can view the details of the respective contract.
Payment Amount	Displays the payment segment amount.
Match Event ID	Indicates the match event which is created for the payment segment.

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Column Name	Column Description
	Note: It has a link. On clicking the link, the **Match Event** screen appears where you can view the details of the respective match event.

Related Topics

For more information on...	See...
How to view payment segments of a payment	Viewing the Payment Segments of a Payment on page 1555

Searching for a Payment Event

Prerequisites

To search for a payment event, you should have:

- Tender types defined in the application.
- Characteristic types defined in the application (where the characteristic entity is set to **Payment Tender**).

Procedure

To search for a payment event:

1. Click the **Menu** link in the **Application** toolbar.
   A list appears.
2. From the **Main** menu, select **Payments** and then click **Payment Event Summary**.
   The **Payment Event Summary** screen appears.
3. Enter the search criteria in the **Search Payment Event** zone.

   Note: ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.
4. Click **Search**.
   A list of payment events that meet the search criteria appears in the **Search Results** section.

Related Topics

For more information on...	See...
Payment Event Summary screen	Payment Event Summary on page 1536
Search Payment Event zone	Search Payment Event on page 1537

Creating a Payment Transfer Request

The system allows you to transfer payments through a payment request. You can either transfer all the payments or an individual payment of a payment event. You can only transfer payments which are in the **Frozen** or **Error** status.

Prerequisites

To create a payment transfer request, you should have:

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- Payment request types defined in the application (where the **Transfer** option is selected).
- Payment cancel reasons defined in the application (where the **Payment Transfer** check box is selected).

Procedure

To create a payment transfer request:

1. Search for the payment event (whose payments you want to transfer) in the **Payment Event Summary** screen.
2. Do either of the following:

If you want to...	Then...
Transfer all payments of a payment event	**a.** In the **Search Results** section, click the **Transfer** button in the **Transfer** column corresponding to the payment event whose payments you want to transfer.
	Note: The **Transfer** button appears only when: • One or more payments of the payment event are in the **Frozen** or **Error** status. • There is no payment transfer request which is currently in progress for the payment event.
Transfer one or more payments of a payment event	**a.** In the **Search Results** section, click the **Broadcast** (ᯤ) icon corresponding to the payment event whose payments you want to view. The **Payments** zone appears. **b.** Select the check box corresponding to the payments that you want to transfer. **c.** Click the **Transfer** button placed in the column header of the **Payments** zone.
	Note: You can transfer a payment when it is in the **Frozen** or **Error** status.

The **Select Payment Request Type** screen appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Payment Request Type	Used to indicate the payment request type using which you want to create the payment transfer request.	Yes
	Note: The list includes only those payment request types where the **Transfer** option is selected.	

3. Select the required payment request type from the respective field.
4. Click **OK**.
   The **Payment Request** screen appears. It contains the following sections:
   - **Main** - Used to specify basic details about the payment transfer request. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Payment Request Type	Indicates the payment request type using which you want to create the payment transfer request.	Not applicable
Payment Event Information	Displays information about the payment event whose payments you want to transfer.	Not applicable
Maximum Transfer Amount	Displays the maximum payment amount which you can transfer.	Not applicable

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Field Name	Field Description	Mandatory (Yes or No)
Transfer Amount	Used to specify the total payment amount which you want to transfer. **Note:** By default, the maximum transfer amount appears in this field.	Yes
Payor Account Information	Indicates the payor account ID. **Note:** The **Search** (🔍) icon appears corresponding to the **Payor Account Information** field. On clicking the **Search** icon, the **Account Search** window appears. On specifying the payor account information, the description of the payor account appears corresponding to the **Payor Account Information** field. This field appears when you want to transfer all the payments of a payment event.	Yes
Payment Date	Displays the date when the payment is transferred. **Note:** By default, the current date appears in this field, if the payment date is not available. This field appears when you want to transfer all the payments of a payment event.	Not applicable
Transfer Reason	Used to indicate the reason why you want to transfer the payments. **Note:** The list includes only those payment cancel reasons where the **Payment Transfer** check box is selected.	Yes

- **Match Types** - Used to define match types for the payment transfer request. This section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Match Type	Used to indicate the match type using which you want to match the payment.	Yes
Show Default	Used to indicate whether the default payment amount should be displayed against the match type entities. **Note:** The **Show Default** check box is selected when you select the match type.	No
Entity	Indicates the match type entity. The valid values are: • **Account** - Enables you to select the account whose unpaid bills, unpaid bill segments, settlement IDs, or	Not applicable

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Field Name	Field Description	Mandatory (Yes or No)
	contracts are considered against which the payment must be matched. • **Bill** - Enables you to select the unpaid bill against which the payment must be matched. • **Person** - Enables you to select the person against which the payment must be matched. • **Statement** - Enables you to select the statement against which the payment must be matched.	
Entity ID	Used to indicate the entity (such as, account, bill, person, or statement) against which the entity must be matched. **Note:** The **Search** (🔍) icon appears corresponding to this field. On clicking the **Search** icon, based on the selected match type, the relevant entity **Search** window appears. On specifying the entity, the description of the entity appears corresponding to the **Entity ID** field. If you want to edit the entity ID, you need to first remove the row and then add it again with the updated information.	Yes

5. Enter the required details.
6. If you want to specify more than one match type for the payment transfer request, click the **Add** (+) icon and then *r*epeat step 5.

Note:

However, if you want to remove a match type from the payment transfer request, click the **Delete** (🗑) icon corresponding to the match type.

You cannot edit an existing row in the **Match Types** section. If you want to edit the details of an existing row, you need to first remove the row and then add it again with the updated information.

You can use multiple match types in the payment creation or transfer request. But, while using the match type where the entity type is set **Person**, you cannot use any another match type where the entity type is set to **Account** or **Bill**. You are only allowed to use additional match types where the entity type is set **Person**.

7. Click **Manual Distribution**.

   The payment transfer request is created and the status of the payment transfer request is set to **Draft**. The **Payment Request** screen appears. Depending on the match type and match entity specified while creating the payment transfer request, the following entities are listed in the **Payment Distribution** zone:

Match Type	Match Entity	Entities
By Bill Regular	Account	Unpaid bills of the account
By Bill Weighted	Account	Unpaid bills of the account
By Bill	Bill	Unpaid bill
By Bill Segments	Account	Unpaid bill segments
By Suspense Contract	Account	Contracts of the account

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Match Type	Match Entity	Entities
		Note: Only contracts of the contract type where the **Eligible for Billing** flag is set to **No** and **Special Role** flag is set to **Suspense** are listed in the **Payment Distribution** zone. If no contracts with this specification exist for the account, the system checks whether there is any such contract type (where the **Eligible for Billing** flag is set to **No** and **Special Role** flag is set to **Suspense**) defined for the division to which the account belongs. If there is any such contract type defined for the division, the system creates the contract for the account using the respective contract type and the same is listed in **Payment Distribution** zone.
By Settlement	Account	Unpaid bill segments where the settlement account is stamped
By Statement	Statement	Unpaid bills of the statement
By Person	Person	Unpaid bills of the person's accounts and all its child persons' accounts

If the **Show Default** check box is not selected against a match type while creating the payment transfer request, the payment amount against the respective match type entities is set to zero. However, if the **Show Default** check box is selected against a match type, the payment amount appears against the respective match type entities. The transfer amount is divided among the entities in the sequence of match types (where **Show Default** check box is selected) followed by the sequence of bill, bill segment, or contract start date. You can then edit the payment amount, if required.

Note:

If a payment transfer request is already created for a payee account and is currently in progress, the system will not allow you to create another payment transfer request for the payee account until the previous payment transfer request is in the **Processed** or **Rejected** status.

The system does not allow you to create a payment transfer request for a payee account when the respective match type entities (such as unpaid bills, unpaid bill segments, contracts, or settlement IDs do not exists for the payee account.

If the entire refund amount is already processed for the payee account, the system will not allow you to create a payment transfer request.

Related Topics

For more information on...	See...
How to search for a payment event	Searching for a Payment Event on page 1543
Payment Request screen	Payment Request (Used for Viewing) on page 1506
Payment Distribution zone	Payment Distribution on page 1514
How to view the details of a payment transfer request	Viewing the Payment Creation Request Details on page 1506
How to edit a payment transfer request	Editing a Payment Transfer Request on page 1548

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For more information on...	See...
How to delete a payment transfer request	Deleting a Payment Creation or Transfer Request on page 1522
How to edit the payment amount against each entity	Editing the Payment Amount on page 1518
How to distribute the tender or payment amount	Distributing the Tender or Payment Amount on page 1522
How to freeze the payments created through a payment transfer request	Freezing Payments Created Through a Payment Request on page 1529
How to approve a payment transfer request	Approving a Payment Creation or Transfer Request on page 1531
How to reject a payment transfer request	Rejecting a Payment Creation or Transfer Request on page 1532
How to edit the amount of a payment segment	Editing the Payment Segment Amount on page 1526
How to submit a payment transfer request for approval	Submitting a Payment Creation or Transfer Request for Approval on page 1530

Editing a Payment Transfer Request

Procedure

To edit a payment transfer request:

1. Search for the payment transfer request in the **Payment Request** screen.
2. In the **Search Results** section, click the link in the **Payment Request Information** column corresponding to *t*he payment transfer request whose details you want to edit.
   The **Payment Request** screen appears.
3. Click the **Edit** button in the **Payment Request** zone.

   The **Payment Request** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details about the payment transfer request. This section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Payment Request Information	Displays information about the payment transfer request.	Not applicable
Payment Request Type	Indicates the payment request type using which the payment transfer request is created.	Not applicable
Payment Event Information	Displays information about the payment event.	Not applicable
Maximum Transfer Amount	Displays the maximum payment amount which you can transfer.	Not applicable
Transfer Amount	Displays the total payment amount which can be transferred.	Not applicable

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Field Name	Field Description	Mandatory (Yes or No)
	Note: By default, the maximum transfer amount appears in this field.	
Payor Account Information	Indicates the payor account ID. **Note:** The **Search** (🔍) icon appears corresponding to the **Payor Account Information** field. On clicking the **Search** icon, the **Account Search** window appears. On specifying the payor account information, the description of the payor account appears corresponding to the **Payor Account Information** field. This field appears when you want to transfer all the payments of a payment event.	
Payment Date	Displays the date when the payment is made. **Note:** By default, the current date appears in this field, if the payment date is not available. This field appears when you want to transfer all the payments of a payment event.	Yes
Transfer Reason	Used to indicate the reason why you want to transfer the payments. **Note:** The list includes only those payment cancel reasons where the **Payment Transfer** check box is selected.	Yes

- **Match Types** - Used to edit match types for the payment transfer request. This section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Match Type	Indicates the match type using which you want to match the payment. **Note:** This field appears as read-only while you are viewing the match types which are added for the payment transfer request.	Yes
Show Default	Indicates whether the default payment amount should be displayed against the match type entities. **Note:** The **Show Default** check box is selected when you select the match type.	No
Entity	Indicates the match type entity. The valid values are:	Not applicable

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Field Name	Field Description	Mandatory (Yes or No)
	• **Account** - Enables you to select the account whose unpaid bills, unpaid bill segments, settlement IDs, or contracts are considered against which the payment must be matched. • **Bill** - Enables you to select the unpaid bill against which the payment must be matched. • **Person** - Enables you to select the person against which the payment must be matched. • **Statement** - Enables you to select the statement against which the payment must be matched.	
Entity ID	Used to indicate the entity (such as, account, bill, person, or statement) against which the entity must be matched. **Note:** If you want to edit the entity ID, you need to first remove the row and then add it again with the updated information. In that case, the **Search** (🔍) icon appears corresponding to this field. On clicking the **Search** icon, based on the selected match type, the relevant entity **Search** window appears. On specifying the entity, the description of the entity appears corresponding to the **Entity ID** field.	Yes

4. Modify the details of the payment transfer request, if required.
5. If you want to specify more than one match type for the payment transfer request, click the **Add** (+) icon and then *r*epeat step 4.

Note:

However, if you want to remove a match type from the payment transfer request, click the **Delete** (🗑) icon corresponding to the match type.

You cannot edit an existing row in the **Match Types** section. If you want to edit the details of an existing row, you need to first remove the row and then add it again with the updated information.

You can use multiple match types in the payment creation or transfer request. But, while using the match type where the entity type is set **Person**, you cannot use any another match type where the entity type is set to **Account** or **Bill**. You are only allowed to use additional match types where the entity type is set **Person**.

6. Click **Manual Distribution**.

   The changes made to the payment transfer request are saved. The **Payment Request** screen appears. Depending on the information specified in the **Match Types** section, the following entities are listed in the **Payment Distribution** zone.

Match Type	Match Entity	Entities
By Bill Regular	Account	Unpaid bills of the account
By Bill Weighted	Account	Unpaid bills of the account
By Bill	Bill	Unpaid bill
By Bill Segments	Account	Unpaid bill segments
By Suspense Contract	Account	Contracts of the account

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Match Type	Match Entity	Entities
		Note: Only contracts of the contract type where the **Eligible for Billing** flag is set to **No** and **Special Role** flag is set to **Suspense** are listed in the **Payment Distribution** zone. If no contracts with this specification exist for the account, the system checks whether there is any such contract type (where the **Eligible for Billing** flag is set to **No** and **Special Role** flag is set to **Suspense**) defined for the division to which the account belongs. If there is any such contract type defined for the division, the system creates the contract for the account using the respective contract type and the same is listed in **Payment Distribution** zone.
By Settlement	Account	Unpaid bill segments where the settlement account is stamped
By Statement	Statement	Unpaid bills of the statement
By Person	Person	Unpaid bills of the person's accounts and all its child persons' accounts

If the **Show Default** check box is not selected against a match type while creating the payment transfer request, the payment amount against the respective match type entities is set to zero. However, if the **Show Default** check box is selected against a match type, the payment amount appears against the respective match type entities. The transfer amount is divided among the entities in the sequence of match types (where **Show Default** check box is selected) followed by the sequence of bill, bill segment, or contract start date. You can then edit the payment amount, if required.

Related Topics

For more information on...	See...
How to search for a payment request	Searching for a Payment Request on page 1497
Payment Request screen	Payment Request (Used for Viewing) on page 1506
Payment Request zone	Payment Request on page 1507
Payment Details zone	Payment Details on page 1514
Payment Distribution zone	Payment Distribution on page 1514

Canceling a Payment Tender

Prerequisites

To cancel a payment tender, you should have:

- Cancel reasons defined in the application.

Procedure

To cancel a payment tender:

1. Search for the payment tender in the **Payment Event Summary** screen.
2. In the **Search Results** section, click the **Tender Cancel** link in the **Cancel** column *c*orresponding to the payment tender that you want to cancel.
   The **Payment Event** screen appears.

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3. Ensure that the **Tenders** tab is selected.
4. Click the **Cancel** button in the **Tender Action** row.

   The **Tender Cancel** window appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Cancel Reason	Used to indicate the reason why you want to cancel the payment tender.	Yes
Bank Account To Charge	Used to specify the bank account which is designated to receive the cancelation charges. The following fields must be provided: • **Bank Code** - Used to indicate code that represents a bank or specific branch. **Note:** The **Search** (🔍) icon appears corresponding to the **Bank Code** field. On clicking the **Search** icon, the **Bank Code Search** screen appears. On specifying the bank code, the description of the bank code appears corresponding to the **Bank Code** field. • **Bank Account Key** - Used to indicate the key that represents a specific bank account. **Note:** The **Search** (🔍) icon appears corresponding to the **Bank Account Key** field. On clicking the **Search** icon, the **Bank Account Search** screen appears. On specifying the bank account key, the description of the bank account key appears corresponding to the **Bank Account Key** field.	Yes

5. Click **OK**.
   The payment tender and all the payments within the payment event are canceled.

Note: The **Tender Cancel** link appears when:

- One or more payments of the payment event are in the **Frozen** status.
- One or more payments of the payment event are not in the **Freezable** or **Error** status.
- There is no payment transfer request which is currently in progress for the payment event.

Related Topics

For more information on...	See...
How to search for a payment event	Searching for a Payment Event on page 1543
Payment Event Summary screen	Payment Event Summary on page 1536

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Deleting a Payment Event

Procedure

To delete a payment event:

1. Search for the payment event in the **Payment Event Summary** screen.
2. In the **Search Results** section, click the **Delete** button in the **Delete** column *c*orresponding to the payment event that you want to delete.
   A message appears confirming whether you want to delete the payment event.

> **Note:** The **Delete** button appears when the respective payments of the payment event are in **Freezable**, **Error**, or **Incomplete** status.

3. Click **OK**.
   The payment event is deleted.

> **Note:** You can delete a payment event when the payment(s) of the payment event are in **Freezable**, **Error**, or **Incomplete** status. On deleting a payment event, the respective payments, payment segments, and payment tender are also deleted.

Related Topics

For more information on...	See...
How to search for a payment event	Searching for a Payment Event on page 1543
Payment Event Summary screen	Payment Event Summary on page 1536

Viewing Payments Created Through a Payment Event

Procedure

To view the payments created through a payment event:

1. Search for the payment event in the **Payment Event Summary** screen.
2. In the **Search Results** section, click the **Broadcast** (ᯤ) icon corresponding to the payment event *w*hose payments you want to view.
   The **Payments** zone appears.
3. View all the payments created through the payment event in the **Payments** zone.

Related Topics

For more information on...	See...
How to search for a payment event	Searching for a Payment Event on page 1543
Payments zone	Payments on page 1540

Canceling a Payment

Prerequisites

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To cancel a payment of a payment event, you should have:

- Cancel reasons defined in the application.

Procedure

To cancel a payment of a payment event:

1. Search for the payment event in the **Payment Event Summary** screen.
2. In the **Search Results** section, click the **Broadcast** (ᯤ) icon corresponding to the payment event *w*hose payment you want to cancel.
   The **Payments** zone appears.
3. Select the check box corresponding to the payment that you want to cancel in the **Payments** zone.
4. Click **Cancel**.

   The **Payment Cancel** window appears. It contains the following field:

Field Name	Field Description	Mandatory (Yes or No)
Cancel Reason	Used to indicate the reason why you want to cancel the payment.	Yes

> **Note:** You can cancel a payment only when the payment is in the **Frozen** status.

5. Select the cancel reason from the **Cancel Reason** list.
6. Click **OK**.
   The status of the payment is changed to **Canceled**.

Related Topics

For more information on...	See...
How to search for a payment event	Searching for a Payment Event on page 1543
Payments zone	Payments on page 1540

Deleting a Payment

Procedure

To delete a payment of a payment event:

1. Search for the payment event in the **Payment Event Summary** screen.
2. In the **Search Results** section, click the **Broadcast** (ᯤ) icon corresponding to the payment event *w*hose payment you want to delete.
   The **Payments** zone appears.
3. Select the check box corresponding to the payment that you want to delete in the **Payments** zone.

> **Note:** You can also select multiple payments at the same time. In addition, you can select the check box corresponding to the column header. This allows you to delete all the payments listed in the **Payments** zone.

4. Click **Delete**.
   A message appears confirming whether you want to delete the payment.

> **Note:** You can delete a payment only when the payment is in the **Freezable** or **Error** status.

5. Click **OK**.
   The payment is deleted.

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Related Topics

For more information on...	See...
How to search for a payment event	Searching for a Payment Event on page 1543
Payments zone	Payments on page 1540

Creating a Refund Request for a Payment

The system allows you to create a refund request for a payment. You can refund an individual payment of a payment event. You can only refund payments which are in the **Frozen** status and matched against the suspense or excess credit contracts. For more information, see Creating a Refund Request on page 1774

Related Topics

For more information on...	See...
How to search for a payment event	Searching for a Payment Event on page 1543

Viewing the Payment Segments of a Payment

Procedure

To view the payment segments of a payment:

1. Search for the payment event in the **Payment Event Summary** screen.
2. In the **Search Results** section, click the **Broadcast** (ᯤ) icon corresponding to the payment event *w*hose payment segments you want to view.
   The **Payments** zone appears.
3. In the **Payments** zone, click the **Broadcast** (ᯤ) icon corresponding to the payment *w*hose payment segments you want to view.
   The **Payment Segments** zone appears.
4. View the payment segments of the payment in the **Payment Segments** zone.

Related Topics

For more information on...	See...
How to search for a payment event	Searching for a Payment Event on page 1543
Payments zone	Payments on page 1540
Payment Segments zone	Payment Segments on page 1542

Updating the Transfer Amount in a Payment Transfer Request

Procedure

To update the transfer amount in a payment transfer request:

1. Search for the payment transfer request in the **Payment Request** screen.
2. In the **Search Results** section, click the link in the **Payment Request Information** column corresponding to *t*he payment transfer request whose transfer amount you want to update.

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The **Payment Request** screen appears.

3. Click the **Update Transfer Amount** button in the **Payment Request** zone.
The **Update Transfer Amount** screen appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Maximum Transfer Amount	Displays the maximum payment amount which you can transfer.	Not applicable
Transfer Amount	Used to specify the total payment amount which you want to transfer. **Note:** By default, the maximum transfer amount appears in this field. The transfer amount must be less than or equal to maximum transfer amount. The transfer amount cannot be less than or equal to zero.	Yes

Note: The **Update Transfer Amount** button appears when the payment transfer request is in the **Draft** status.

4. Update the transfer amount, if required.
5. Click **Save**
The transfer amount in the payment transfer request is updated.

Note: You can convert a full payment transfer into partial payment transfer by clicking the **Update Transfer Amount** button in the **Payment Request** zone.

Related Topics

For more information on...	See...
How to search for a payment request	Searching for a Payment Request on page 1497
Payment Request screen	Payment Request (Used for Viewing) on page 1506

Updating the Tender Details in a Payment Transfer Request

Procedure

To update the tender details in a payment transfer request:

1. Search for the payment transfer request in the **Payment Request** screen.
2. In the **Search Results** section, click the link in the **Payment Request Information** column corresponding to *t*he payment transfer request whose details you want to view.

   The **Payment Request** screen appears.
3. Click the **Update Tender Details** button in the **Payment Request** zone.
The **Update Tender Details** screen appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Tender Type	Indicates the type of tender through which the payment is made.	Not applicable

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Field Name	Field Description	Mandatory (Yes or No)
Tender Amount	Displays the tender amount.	Not applicable
Currency	Indicates the currency in which the payment is made.	Not applicable
Check Number	Displays the check number if the payment is made through check.	Not applicable
Pay Tender ID	Indicates the payment tender ID.	Not applicable
Tender Status	Indicates the status of the tender. The valid values are: • Valid • Cancelled	Not applicable
Tender Control ID	Used to indicate the tender control ID. **Note:** The **Search** (🔍) icon appears corresponding to this field. On clicking the **Search** icon, the **Tender Control Search** window appears. On specifying the tender control ID, the description of the tender control ID appears corresponding to the **Tender Control ID** field.	Yes
Deposit Control Information	Used to indicate the deposit control ID. **Note:** It is a read-only field. The data appears in this field when the tender control ID is specified.	No
MICR ID	Used to specify the MICR code on the payment.	No
Ext. Reference ID	Used to specify the external reference ID associated with the tender source.	No
Person ID	Used to specify the person ID to whom the payment is made.	No
Name	Used to specify the name of the person to whom the payment is made.	No

In addition to the above fields, this screen contains the following section:

The **Characteristics** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Characteristic Type	Used to indicate the characteristic type. **Note:** The list includes only those characteristic types where the characteristic entity is set to **Payment Tender**.	Yes (Conditional) **Note:** This field is required when you are updating the tender details in a payment transfer request.

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Field Name	Field Description	Mandatory (Yes or No)
Characteristic Value	Used to specify the value for the characteristic type.	Yes (Conditional)
	Note: If you select a predefined characteristic type, the **Search** (🔍) icon appears corresponding to the **Characteristic Value** field. On clicking the **Search** icon, you can search for a predefined characteristic value. On specifying the value for a predefined characteristic type, the description of the characteristic value appears corresponding to the **Characteristic Value** field.	**Note:** This field is required when you are updating the tender details in a payment transfer request.

Note: The **Update Tender Details** button appears when the payment transfer request is in the **Processed** status.

4. Enter the required details.
5. Define the characteristics for the payment tender, if required.
6. Click **Save**.
   The tender details are updated in the payment transfer request.

Related Topics

For more information on...	See...
How to search for a payment request	Searching for a Payment Request on page 1497
Payment Request screen	Payment Request (Used for Viewing) on page 1506
Payment Request zone	Payment Request on page 1507

Chapter 23

Account Receivable Central

Topics:

- Single Offset
- Mass Offset
- Cross Currency Offset
- Hold
- Refund
- Write Off
- Dispute
- Account Receivable Central

The Account Receivable Central is a portal which facilitates user to perform Single/Mass/Cross Currency offset operation for a bill's outstanding amount with another bill or multiple bills. You can also refund/write off amount to the account using refund requests and write off requests respectively.

Account Receivable Central also enables to put bill(s) on hold for the funding purpose. It allows you to have a complete overview of the bills. Based on the search criteria, the system returns a list of bills that meet the search criteria.

Account Receivable Central is used for:

- **Single Offset** - Enables single debit bill to be offset against multiple credit bills in the same currency and vice versa.
- **Mass Offset** - Enables credit/debit bills to be offset against multiple debit and credit bills in the same currency.
- **Cross Currency Offset** - Enables single debit bills to be offset against multiple credit bills in currencies other than the bill selected for offset and vice versa.
- **Hold** - Enables bill(s) to be put on hold fully (the bill outstanding amount) or partially (the bill outstanding amount in partial) for a specific period for funding.
- **Refund** - Enables you to refund amount of credit bill or bill line item (credit bill segment or adjustment) to the account through a refund request.
- **Write Off** - Enables you to write off amount to the account through a write off request.
- **Dispute** - Enables you to dispute amount of credit/debit bill or bill item (credit/debit bill segment or adjustment) to the account through a dispute request.

The bill(s) for offsetting can belong to the same person or multiple persons depending upon the option **Allow Offsetting across Persons** set in the feature configuration **C1-OFFSETREQ** which allows offsetting in the system.

Single Offset

Single Offset enables you to search and add bill to an offset request from the **Account Receivable Central** screen. Single Offset enables single debit bill to be offset against multiple credit bills in the same currency and vice versa. The offset request is created and an offset request ID is generated for the request.

You can search and select credit/debit bills (with outstanding amount) for offsetting belonging to the same or different person. All the selected bills with their outstanding balance are displayed. The display of bills is controlled by **C1-OFFSETREQ** feature configuration. The feature configuration identifies whether offsetting is allowed for bills across persons. To offset bills belonging to different persons, set the **Allow Offsetting Across Persons** option type to **Y**. The bills are displayed having same currency with the default offset amount on the offset request after adding the bills. You can select one or multiple or all the bills displayed and add to the offset request. After you add a debit bill from **Account Receivable Central**, you cannot add more debit bills to the offset request.

Upon adding a bill to the offset request, the default offset amount algorithm **C1-OFST-AMT** configured in the offset request type is invoked. The bills in the offset request are processed based on the logic of oldest bill first. The default offset amount is populated against the selected debit and credit bills. You can also edit the offset amount from the offset request, if required. The offset adjustments for offset requests are created and distributed based on the match type set in the offset distribution algorithm.

You can configure the offset request type to be submitted for offset distribution with or without approval. Upon submitting the offset request for approval, a To Do type is created and sent to the approver for offset request approval. The status of the offset request changes from **Submitted** to **Approval In Progress** in case of offset request with approval and in case of offset request without approval it changes to **Processed**. The approver can either approve or reject the offset request. Once the approver approves the offset request, selected bills are offset and adjustments are created for the bills. The status of the offset request changes from **Approval In Progress** to **Processed**. You can also view the details of the adjustment(s) created. However, if the approver rejects an offset request, a rejection reason should be provided.

A log maintained for offset requests logs complete trail of actions performed on offset request except the actions performed while editing the offset request. On submitting, the offset request status changes to **Processed** or **Approval In Progress** depending on the configuration of the offset request type and the **Unapply** button is enabled which cancels the adjustments. Upon cancelling the adjustments, the enter status algorithm cancels the offset adjustments and the status of the request changes to **Unapplied Offset**.

Note: The **Unapply** button appears when the offset request is in the **Processed** status

Bill Information	Original Outstanding Amount	Offset Amount	Remaining Bill Balance	Comments
Bill 1	$1200	-$800	$400	Bill 1 amount $1200 is offset against Bill 2.
Bill 2	-$1000	$500	-$500	From Bill 2, $500 is offset against from Bill 1.
Bill 3	-$300	$300	0	From Bill 3, $300 is offset against from Bill 1.

Mass Offset

Mass offset functions is similar to single offset, the only difference is that mass offset enables credit/debit bills to be offset against multiple debit and credit bills in the same currency.

Upon selection of a debit/credit bill from **Account Receivable Central**, you can add more credit/debit bill(s) from the search bills result in offset request. You can filter the bills using the **Bill Type** filter on the bill search zone to select debit/credit bills to be added to the offset request. While offsetting the credit/debit amount across multiple bills, the oldest bill is offset first.

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A log maintained for offset requests logs complete trail of actions performed on offset request. Once you submit the offset request, the offset request status changes to **Processed** or **Approval In Progress** depending on the configuration of the offset request type. When the offset request status changes to **Processed** adjustments are created and the **Unapply** button is enabled which cancels the adjustments. Upon unapplying the offset request, the enter status algorithm cancels the offset adjustments and the status of the request changes to **Unapplied Offset**.

Bill Information	Original Outstanding Amount	Offset Amount	Remaining Bill Balance	Comments
Bill 1	$2000	-$700	$1300	The Offset amount $400 is offset against Bill 2.
Bill 2	-$400	$400	0	Bill 2 is offset against $400 from Bill Outstanding amount of Bill 1 i.e. $2000.
Bill 3	-$300	$300	0	Bill 3 is offset against $300 from Bill Outstanding amount of Bill 1 i.e. $1600.

Cross Currency Offset

Enables single debit bills to be offset against multiple credit bills in currencies other than the bill selected for offset and vice versa. Cross-currency offset enables you to offset credit/debit bills with different currencies. You can add credit/debit bills to the debit/credit bill added from **Account Receivable Central**. After you add a debit bill from **Account Receivable Central**, you cannot add more debit bills to the offset request. While offsetting the credit/debit amount across multiple bills, the oldest bill is offset first.

The **C1-OFFSUBENT** algorithm validates whether the sum of debit offset amount is equal to sum of credit offset amount for all bills selected in the offset request. After validation, status of the offset request changes to **Processed** or **Approval In Progress** depending on the configuration of the offset request type.

Bill Information	Outstanding Amount	Outstanding Amount (in Offset currency)	Offset Amount	Remaining Bill Balance	Comments
Bill 1	$300	$300	-$130.1	$169.9	Outstanding amount $300 is offset against $130.1 (£100). (Exchange rate: 1£=1.3$)
Bill 2	-£100	-$130.1	$130.1	0	Outstanding amount £100 ($130.1) of Bill 2 is offset against $300 from Bill 1.

Note: In case of multiple exchange rates with same date and different timestamps, the latest timestamp is considered.

Note: The adjustments are created in the currency of the bill.

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Hold

Account Receivable Central enables bill(s) to be put on hold which belongs to a person's account or all accounts of a particular person. When a bill is put on hold, specific reason must be specified; no funding related activities can be performed for the specified period.

Funding related activities are put on hold from the start date of the hold request. The hold exists till the hold request release date; however you can also release individual bills.

You can only put bills on hold which has **Completed** status. When a person/account is on hold, all the subsequent bills under them are also on hold irrespective of bill status. You can select the bill amount in a bill to be put on hold i.e. you can put the particular bill on hold with partial or full bill amount.

Hold request type is used to define the hold request. In the hold request type, the **Hold Process** is set to **Funding**, which puts hold on only the funding activities of the selected bill belonging to a person or account.

Refund

Enables you to refund amount of credit bill to account through a refund request. For creating a refund request you need to specify the refund request type using which you want to create the refund request. The refund request can be defined with (single level/multi-level) or without approval workflow. An approval profile should be defined for the approval workflow. While defining the refund request type, the adjustment type should be defined for creating refund adjustments.

Write Off

Enables you to write off the amount to the account through a write off request. For creating a write off request you need to specify the write off request type. The write off request can be defined with (single level/multi-level) or without approval workflow. An approval profile should be defined for the approval workflow. While defining the write off request type, the adjustment type should be defined for creating write off adjustments.

Dispute

Enables you to dispute amount of credit/debit bill to an account through a dispute request. For creating a dispute request you need to specify the dispute request type using which you want to create the dispute request. The dispute request can be defined with (single level/multi-level) or without approval workflow. An approval profile should be defined for the approval workflow. While defining the dispute request type, the adjustment type should be defined for creating dispute adjustments.

Account Receivable Central

The **Account Receivable Central** screen allows you to search for bills using various search criteria. This screen consists of the following zones:

- Search Bill on page 1563

Through the **Account Receivable Central** screen, you can navigate to the following screens:

- Offset Request (Used for Viewing) on page 1627
- Hold Request (Used for Viewing) on page 1947

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- Refund Request (Used for Viewing) on page 1780
- Write Off Request (Used for Viewing) on page 1818
- Dispute Request (Used for Viewing)

Search Bill

The **Search Bill** zone allows you to search for bills in the **Accounts Receivable Central** screen using various search criteria. This zone contains the following two sections:

- **Search Criteria** - The **Search Criteria** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Search By	Used to indicate whether you want to search bills using bill details, using account details or using person details whose account is linked to a particular bill. The valid values are: • **Person Details** • **Account Details** • **Bill Details** **Note:** By default, the **Person Details** option is selected.	Yes
Person ID	Used to select the person ID based on which you want to search for bills of a person. **Note:** This field appears when you select the **Person Details** option from the **Search By** list. The **Search** (🔍) icon appears corresponding to this field. On clicking the **Search** icon, the **Account Search** window appears.	No
Person Hierarchy	Used to indicate whether to display hierarchy of the person linked to a particular bill. **Note:** This field appears when you select the **Person Details** option from the **Search By** list.	No
Person Identifier Type	Used to select the identifier type based on which you want to search for bills of a person. **Note:** This field appears when you select the **Person Details** option from the **Search By** list.	Yes (Conditional) **Note:** If you enter the person identifier as a search criteria, you have to select the person identifier type.
Person Identifier	Used to specify the value of the person identifier type. **Note:** This field appears when you select the **Person Details** option from the **Search By** list.	Yes (Conditional) **Note:** If you enter the person identifier type as a search criteria, you have to select the person identifier.

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Field Name	Field Description	Mandatory (Yes or No)
Bills on Hold	Used to indicate whether the bill is on hold. The valid values are: • No • Yes	No
Bill Balance	Used to search bills with a particular balance amount. The valid values are: • Equal to Zero • Greater Than Zero • Less Than Zero • Not Equal to Zero	No
Pending Bills	Used to indicate whether the bill is pending.	No
Account ID	Used to search for bills of a particular account. **Note:** This field appears when you select the **Account Details** option from the **Search By** list.	No
Account Identifier Type	Used to specify the account identifier type of the account whose bill you want to search. **Note:** This field appears when you select the **Account Details** option from the **Search By** list.	No
Account Identifier	Used to select the account identifier based on which you want to search for bills of a particular account. **Note:** This field appears when you select the **Account Details** option from the **Search By** list.	No
Bill ID	Used to search a particular bill. **Note:** This field appears when you select the **Bill Details** option from the **Search By** list.	No
Alternate Bill ID	Used to search a particular bill using the alternate bill ID. **Note:** This field appears when you select the **Bill Details** option from the **Search By** list.	No
Invoice Currency	Used to search for bills which are billed in a particular currency. **Note:** This field appears when you select the **Bill Details** option from the **Search By** list.	No
Bill Date From	Used to search bills which are created from a particular date onwards.	No
To	Used to search bills which are created till a particular date.	No

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Field Name	Field Description	Mandatory (Yes or No)
Bill Outstanding Amount From	Used to search bills with a particular minimum outstanding amount.	
To	Used to search bills with a particular maximum outstanding amount.	

Note: You must specify at least one search criterion while searching for a bill when you select the **Person Details** or **Account Details** option from the **Search By** list.

- **Search Results** - On clicking the **Search** button, the search results appear based on the specified search criteria. The **Search Results** section contains the following columns:

Column Name	Column Description
Bill Information	Displays additional information about the bill. In addition, this column has a context menu which helps in navigating to other screens in the application.
	Note: It has a link. On clicking the link, the **Bill** screen appears with the details of the respective bill.
Original Bill Amount	Displays the bill amount when the bill was generated.
Outstanding Amount	Displays the current bill balance amount.
Bill Date	Used to specify the date on which the bill was generated.
Hold Amount	Displays the amount from the bill that is on hold.
Account Information	Displays additional information about the account. In addition, this column has a context menu which helps in navigating to other screens in the application. A tool tip appears when you hover over this column corresponding to the bill. It indicates the Current Balance, Excess Payment and Unapplied Payments and their values.
	Note: It has a link. On clicking the link, the **Account** screen appears where you can view the details of the respective bill.
Person Information	Displays additional information about the person. In addition, this column has a context menu which helps in navigating to other screens in the application.
	Note: It has a link. On clicking the link, the **Person** screen appears with the details of the respective bill.

This zone contains following buttons:

Button Name	Button Description
Single Offset	Used to add the selected bill with same currency to an offset request.
Mass Offset	Used to add the selected bills with same currency to an offset request.
Cross Currency Offset	Used to add the selected bills with different currency to an offset request.
Hold	Used to add the selected bill to hold request to be put on hold.
Write Off	Used to add the selected bill to a write off request.
Refund	Used to add the selected bill to a refund request.
Dispute	Used to add the selected bill to a dispute request.

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Related Topics

For more information on...	See...
How to search for bill	Searching for a Bill on page 1568
How to view the details of a bill	Viewing the Bill Details on page 1568

Bill Information

The **Bill Information** screen allows you to view detail information of a particular bill.

This screen consists of the following zones:

- Hold Details on page 1566
- Offset Details on page 1566
- Garnishment Details on page 1567
- Bill Line Items on page 1567

Offset Details

The **Offset Details** zone displays details of the offset request. This zone contains following columns:

Column Name	Column Description
Offset Request Information	Displays additional information about the offset request. **Note:** It has a link. On clicking the link, the **Offset Request** screen appears where you can view the details of the respective offset request.
Offset Amount	Displays the total offset amount.
Creation Mode	Displays the mode of creation for offset request . The valid values are: • Automatic • Manual

Hold Details

The **Hold Details** zone displays details of the hold request on a bill. This zone contains following columns:

Column Name	Column Description
Hold Request Information	Displays additional information about the hold request. **Note:** It has a link. On clicking the link, the **Hold Request** screen appears where you can view the details of the respective hold request.
Status	Indicates the status of the hold request.
Entity	Displays the type of entity.
Hold Entity	Displays additional information about the bill which is put on hold.

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Column Name	Column Description
	Note: It has a link. On clicking the link, the **Bill** screen appears where you can view the details of the respective bill.
Start Date	Displays the start date of the hold request.
End Date	Displays the end date of the hold request.

Garnishment Details

The **Garnishment Details** zone displays details garnishment details of the offset request. This zone contains following columns:

Column Name	Column Description
Garnishment Contract	Displays additional information about the contract created against the garnishment adjustments. In addition, this column has a context menu which helps in navigating to other screens in the application.
	Note: It has a link. On clicking the link, the **Contract** screen appears where you can view the details of the respective contract.
Garnishment Amount	Displays the total garnishment amount.

Bill Line Items

The **Bill Line Items** zone displays information about the selected bill's bill line item. This zone contains the following fields:

Field Name	Field Description
Bill Line Item	Displays the bill line item (bill segment/adjustment) of the selected bills.
Bill Line Item Information	Displays the information about the bill line item.
	Note: It has a link. On clicking the link, the **Bill Segment** screen or **Adjustments** screen appears with the details of the respective bill line item or adjustments.
Amount	Displays the amount of the bill line item.
Contract Information	Displays additional information about the contract against which the bill segment or adjustment is created. In addition, this column has a context menu which helps in navigating to other screens in the application.
	Note: It has a link. On clicking the link, the **Contract** screen appears where you can view the details of the respective contract.

Related Topics

For more information on...	See...
How to view the details of a bill	Viewing the Bill Details on page 1568

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Searching for a Bill

Procedure

To search for a bill:

1. Click the **Menu** link in the **Application** toolbar.
   A list appears.
2. From the **Main** menu, select **Accounting and Receivable** and then click **Account Receivable Central**.
   The **Account Receivable Central** screen appears.
3. Enter the search criteria in the **Search Bill** zone.

   Note: ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.

   Note: The wild card search for searching bill in the **Search Bill** zone is applicable when you select the **Bill Details** option from the **Search By** list.
4. Click **Search**.
   A list of bills that meet the search criteria appears in the **Search Results** section.

Related Topics

For more information on...	See...
Account Receivable Central screen	Account Receivable Central on page 1562
Search Bill zone	Search Bill on page 1563

Viewing the Bill Details

Procedure

To view the details of a bill:

1. Search for the bill in the **Account Receivable Central** screen.
2. In the **Search Results** section, click the **Show Context Menu** (▾) icon corresponding to the bill whose details you want to view.
   A menu appears.
3. Click the **Go To Bill Information** menu option.
   The **Bill Information** screen appears.
4. View the details of the bills in the **Bill Information** screen.

Related Topics

For more information on...	See...
Account Receivable Central screen	Account Receivable Central on page 1562
Bill Information screen	Bill Information on page 1566
How to search for a bill	Searching for a Bill on page 1568

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Chapter 24

Offset Request

Topics:

- Single Offset
- Mass Offset
- Cross Currency Offset
- Prerequisites
- Offset Request (Without Approval) Status Transition
- Offset Request (With Approval) Status Transition
- Bill Line Items Level Offset
- Internal Offsetting of Zero Balance Bill
- Automatic Offset of Debit and Credit Bill Line Items
- FT Extension Record on Offset Request Adjustment Freeze
- Algorithms Used in C1-OffsetRequest
- Additional Algorithms Used in Offset Request
- Offset Request Type
- Offset Request (Used for Searching)
- Offset Request (Used for Viewing)

Oracle Revenue Management and Billing allows you to offset the credit and debit bills across accounts of the person and/or its hierarchy. However, you can offset bills across person's hierarchy when the **Allow Offsetting Across Persons** option type of the **C1-OFFSETREQ** feature configuration is set to **Y**.

You can offset a credit bill with a debit bill and vice-versa. You can offset one or more credit bills with one or more debit bills and vice-versa. You can offset the credit and debit bills in the same currency or in the different currencies. The system enables you to offset bills through an offset request. You can create an offset request from the following screens:

- Account Receivable Central on page 1562
- Offset Request (Used for Searching) on page 1620

You can create the following types of offset request from both the above screens:

- Single Offset on page 1573
- Mass Offset on page 1574
- Cross Currency Offset on page 1576

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

- The business object using which the offset request should be created in the system.
- The default adjustment type using which the transfer or offset adjustment should be created in the system.
- The algorithm which helps to calculate default offset amount when a bill is added to the offset request.
- Whether approval is required while offsetting bills through an offset request.
- Whether an offset request must be processed in the deferred mode or in real time (i.e. immediately)
- The maximum search period (in days) that you want to allow while searching bills in an offset request.
- Whether the transfer or offset adjustments should be created while offsetting bills through an offset request.

In addition, while creating an offset request, you need to specify a primary bill for which you want to create the offset request. A primary bill can be a debit or credit bill. Once the primary bill is added to an offset request, you can never remove it from the offset request.

Once you specify an offset request type and primary bill, the offset request is created in the **Draft** status. You can then add one or more debit or credit bills in the same or different currencies to the offset request depending on whether you want to create single, mass, or cross currency offset request. These bills

are called as secondary bills. You can remove a secondary bill from the offset request when it is in the **Draft** status.

Once both the debit and credit bills are added to an offset request, the default offset amount is calculated for each bill. You can then update the offset amount of a bill, if required. Once the offset amount is specified for each bill, you can submit the offset request. On submitting an offset request, the system checks whether the number of financial transactions created for the bills (which are selected in the offset request) exceeds the defer processing count (defined in the respective offset request type). If the number of financial transactions does not exceed the defer processing count, the system creates the transfer or offset adjustments in the **Frozen** status. However, if the number of financial transactions exceeds the defer processing count, the system changes the status of the offset request to **Deferred Processing**. On executing the **Offset Request Periodic Monitor (C1-OFSRQ)** batch, the system considers the offset requests which are in the **Deferred Processing** status. The batch then creates the transfer or offset adjustments for these offset requests in the **Frozen** status.

You can optionally configure the approval process for the offset request. The approver can either approve or reject an offset request based on the observations. The system also enables you to unapply (i.e. cancel) an offset request. On canceling an offset request, the transfer or offset adjustments created for bills through the offset request are canceled.

An offset request goes through various statuses in its lifecycle. For more information about the offset request statuses, see Offset Request (Without Approval) Status Transition on page 1579 and Offset Request (With Approval) Status Transition on page 1580. Note that the lifecycle of an offset request is driven by business object using which the offset request is created. An offset request business object named **C1-OffsetRequest** is shipped with the product. The offset request feature explained in this document is articulated based on the lifecycle and logic defined in the **C1-OffsetRequest** business object.

For more information on how to setup the offset request feature, see Prerequisites on page 1578.

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Single Offset

Single offset means you can offset one credit bill against multiple debit bills and vice-versa in the same currency. Let us understand this with the help of an example.

The following table lists the bills of a customer which are available for single offset:

Account	Bill	Due Date	Bill Segment	Contract Type Priority	Bill Segment Amount	Outstanding Bill Amount	Hold Amount
A1	Bill 1	06-18-2018	BS1	10	-$100	-$100	-$20
	Bill 2	06-12-2018	BS2	10	$30	$30 (This is because $20 is already paid.)	$10
			BS3	20	$20		
	Bill 3	06-22-2018	BS4	10	$30	$30	$10
	Bill 4	06-28-2018	BS5	20	$30	$40	-
			BS6	30	$10		

The system enables you to offset these bills through a single offset request. While creating a single offset request, you can add the Bill 1 as the primary bill against which you can offset the debit bills - Bill 2, Bill 3, and Bill 4. Note that you can only add completed bills to an offset request. The system then calculates the total credit and debit bill amount which is available for offsetting, as shown below:

Sum of credit bills' amount which is available for offsetting:

```
(-$100-(-$20))= (-$100+$20)=-$80
```

Sum of debit bills' amount which is available for offsetting:

```
(($30-$10)+($30-$10)+($40))=$80
```

The system considers the credit or debit bills' total whichever is less as the default offset amount. You can change the offset amount of a bill, if required. However, you need to ensure the following:

- Offset amount of the selected bill is not equal to zero
- Total debit offset amount is equal to total credit offset amount in the offset request
- Negative offset amount is specified for the debit bill and positive offset amount is specified for the credit bill
- Offset amount is less than or equal to the current outstanding amount of the bill

Note: If you add or remove a bill from the offset request after updating the offset amount, the system overrides the offset amount with the default offset amount. In such scenarios, you have to update the offset amount of the bills once again.

On submitting or approving a single offset request, the system creates the transfer or offset adjustments using the adjustment type which is specified in the offset request. If the **Transfer Adjustment** option is selected in the respective offset request type, the system creates the transfer adjustments in the **Frozen** status.

The following table lists the transfer adjustments that are created during the single offset with respect to the above example:

Transfer	Transfer Adjustments
1	• $20 transfer adjustment is created for Bill 1 and matched to -$100 bill segment cancellation (BS1) FT 1

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Transfer	Transfer Adjustments
	• -$20 transfer adjustment is created for Bill 2 and matched to $30 bill segment (BS2) FT 2
2	• $20 transfer adjustment is created for Bill 1 and matched to -$100 bill segment cancellation (BS1) FT 1 • -$20 transfer adjustment is created for Bill 3 and matched to $30 bill segment (BS4) FT 4
3	• $30 transfer adjustment is created for Bill 1 and matched to -$100 bill segment cancellation (BS1) FT 1 • -$30 transfer adjustment is created for Bill 4 and matched to $30 bill segment (BS5) FT 5
4	• $10 transfer adjustment is created for Bill 1 and matched to -$100 bill segment cancellation (BS1) FT 1 • -$10 transfer adjustment is created for Bill 4 and matched to $10 bill segment (BS6) FT 6

However, if the **Transfer Adjustment** option is not selected in the respective offset request type, the system creates the offset adjustments in the **Frozen** status. Considering the above example, the system will create the following offset adjustments for the offset request:

- $80 offset adjustment is created for Bill 1 and matched to -$100 Bill Segment Cancellation (BS1) FT 1
- -$20 offset adjustment is created for Bill 2 and matched to $30 bill segment (BS2) FT 2
- -$20 offset adjustment is created for Bill 3 and matched to $30 bill segment (BS4) FT 4
- -$30 offset adjustment is created for Bill 4 and matched to $30 bill segment (BS5) FT 5
- -$10 offset adjustment is created for Bill 4 and matched to $10 bill segment (BS6) FT 6

Similarly, the transfer or offset adjustments are created when the bills are offset across accounts of the person and its hierarchy. The system distributes the amount from the credit bill starting with the oldest due date. For more information on how the offset amount is distributed, see C1-OFST-DIST on page 1589.

You can create a single offset request through the **Account Receivables Central** and **Offset Request** screens. For more information on how to create a single offset request, see Creating an Offset Request on page 1624.

Mass Offset

Mass offset means you can offset one or more credit bills against one or more debit bills and vice-versa in the same currency. Let us understand this with the help of an example.

The following table lists the bills of a customer which are available for mass offset:

Account	Bill	Due Date	Bill Segment	Contract Type Priority	Bill Segment Amount	Outstanding Bill Amount	Hold Amount
A11	Bill 1	01-15-2019	BS1	10	-$50	-$100	-
			BS2	20	-$50		
	Bill 2	01-20-2019	BS3	10	-$50	-$50	-
	Bill 3	01-18-2019	BS4	10	$30	$50	-
			BS5	10	$20		
A12	Bill 4	01-21-2019	BS6	10	$30	$30	-
	Bill 5	01-25-2019	BS7	20	$30	$40	-
			BS8	30	$10		

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Account	Bill	Due Date	Bill Segment	Contract Type Priority	Bill Segment Amount	Outstanding Bill Amount	Hold Amount
A13	Bill 6	01-29-2019	BS9	10	$20	$20	-

The system enables you to offset these bills through a mass offset request. While creating a mass offset request, you can add the Bill 1 as the primary bill. Once the offset request is created, you can add another credit bill (i.e. Bill 2) and the debit bills - Bill 3, Bill 4, Bill 5, and Bill 6. Note that you can only add completed bills to an offset request. The system then calculates the total credit and debit bill amount which is available for offsetting, as shown below:

Sum of credit bills' amount which is available for offsetting:

```
(-$100+(-$50))= (-$100-$50)=-$150
```

Sum of debit bills' amount which is available for offsetting:

```
($50+$30+$40+$20)=$140
```

The system considers the credit or debit bills' total whichever is less as the default offset amount. In this case, the default offset amount is set to $140. You can change the offset amount of a bill, if required. However, you need to ensure the following:

- Offset amount of the selected bill is not equal to zero
- Total debit offset amount is equal to total credit offset amount in the offset request
- Negative offset amount is specified for the debit bill and positive offset amount is specified for the credit bill
- Offset amount is less than or equal to the current outstanding amount of the bill

Note: If you add or remove a bill from the offset request after updating the offset amount, the system overrides the offset amount with the default offset amount. In such scenarios, you have to update the offset amount of the bills once again.

On submitting or approving a mass offset request, the system creates the transfer or offset adjustments using the adjustment type which is specified in the offset request. If the **Transfer Adjustment** option is selected in the respective offset request type, the system creates the transfer adjustments in the **Frozen** status.

The following table lists the transfer adjustments that are created during the mass offset with respect to the above example:

Transfer	Transfer Adjustments
1	• $30 transfer adjustment is created for Bill 1 and matched to -$50 bill segment cancellation (BS1) FT 1 • -$30 transfer adjustment is created for Bill 3 and matched to $30 bill segment (BS4) FT 4
2	• $20 transfer adjustment is created for Bill 1 and matched to -$50 bill segment cancellation (BS1) FT 1 • -$20 transfer adjustment is created for Bill 3 and matched to $20 bill segment (BS5) FT 5
3	• $30 transfer adjustment is created for Bill 1 and matched to -$50 bill segment cancellation (BS2) FT 2 • -$30 transfer adjustment is created for Bill 4 and matched to $30 bill segment (BS6) FT 6
4	• $20 transfer adjustment is created for Bill 1 and matched to -$50 bill segment cancellation (BS2) FT 2 • -$20 transfer adjustment is created for Bill 5 and matched to $30 bill segment (BS7) FT 7

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Transfer	Transfer Adjustments
5	• $10 transfer adjustment is created for Bill 2 and matched to -$50 bill segment cancellation (BS3) FT 3 • -$10 transfer adjustment is created for Bill 5 and matched to $30 bill segment (BS7) FT 7
6	• $10 transfer adjustment is created for Bill 2 and matched to -$50 bill segment cancellation (BS3) FT 3 • -$10 transfer adjustment is created for Bill 5 and matched to $10 bill segment (BS8) FT 8
7	• $20 transfer adjustment is created for Bill 2 and matched to -$50 bill segment cancellation (BS3) FT 3 • -$20 transfer adjustment is created for Bill 6 and matched to $20 bill segment (BS9) FT 9

However, if the **Transfer Adjustment** option is not selected in the respective offset request type, the system creates the offset adjustments in the **Frozen** status. Considering the above example, the system will create the following offset adjustments for the offset request:

- $50 offset adjustment is created for Bill 1 and matched to -$50 Bill Segment Cancellation (BS1) FT 1
- $50 offset adjustment is created for Bill 1 and matched to -$50 Bill Segment Cancellation (BS2) FT 2
- $40 offset adjustment is created for Bill 2 and matched to -$50 Bill Segment Cancellation (BS3) FT 3
- -$30 offset adjustment is created for Bill 3 and matched to $30 bill segment (BS4) FT 4
- -$20 offset adjustment is created for Bill 3 and matched to $20 bill segment (BS5) FT 5
- -$30 offset adjustment is created for Bill 4 and matched to $30 bill segment (BS6) FT 6
- -$30 offset adjustment is created for Bill 5 and matched to $30 bill segment (BS7) FT 7
- -$10 offset adjustment is created for Bill 5 and matched to $10 bill segment (BS8) FT 8
- -$20 offset adjustment is created for Bill 6 and matched to $20 bill segment (BS9) FT 9

Similarly, the transfer or offset adjustments are created when the bills are offset across accounts of the person hierarchy. The system distributes the amount from the credit bill starting with the oldest due date. For more information on how the offset amount is distributed, see C1-OFST-DIST on page 1589.

You can create a mass offset request through the **Account Receivables Central** and **Offset Request** screens. For more information on how to create a mass offset request, see Creating an Offset Request on page 1624.

Cross Currency Offset

Cross currency offset means you can offset one credit bill against multiple debit bills and vice-versa in the different currencies. Let us understand this with the help of an example.

The following table lists the bills of a customer which are available for cross currency offset:

Account	Bill	Due Date	Bill Segment	Contract Type Priority	Bill Segment Amount	Outstanding Bill Amount	Hold Amount
A1	Bill 1	09-18-2018	BS1	10	-$250	-$250	-
	Bill 2	09-12-2018	BS2	10	€10	€30	-
			BS3	20	€20	-	-
	Bill 3	09-22-2018	BS4	10	€50	€50	-
	Bill 4	09-28-2018	BS5	20	€30	€70	-
			BS6	30	€40		

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The system enables you to offset these bills through a cross currency offset request. While creating a cross currency offset request, you can add the Bill 1 as the primary bill against which you can offset the debit bills - Bill 2, Bill 3, and Bill 4. Note that you can only add completed bills to an offset request. In a cross currency offset request, you can offset the bills which are in the currency different from the primary bill. For example, if you have added a primary bill with credit balance in USD, you can only add the debit bills in the currency other than USD. The system then calculates the total credit and debit bill amount which is available for offsetting, as shown below:

Sum of credit bills' amount which is available for offsetting:

```
-$250
```

Sum of credit bills' amount which is available for offsetting (in offset currency):

```
-€227
```

Sum of debit bills' amount which is available for offsetting:

```
(30€+50€+70€)=€150
```

Sum of debit bills' amount which is available for offsetting (in offset currency):

```
$33+$55+$77=$165
```

The system considers the credit or debit bills' total (in the primary bill's currency) whichever is less as the default offset amount. In this case, the default offset amount is set to $165. You can change the offset amount of a bill, if required. However, you need to ensure the following:

- Offset amount of the selected bill is not equal to zero
- Total debit offset amount is equal to total credit offset amount in the offset request
- Negative offset amount is specified for the debit bill and positive offset amount is specified for the credit bill
- Offset amount is less than or equal to the current outstanding amount of the bill

Note: If you add or remove a bill from the offset request after updating the offset amount, the system overrides the offset amount with the default offset amount. In such scenarios, you have to update the offset amount of the bills once again.

On submitting or approving a cross currency offset request, the system creates the transfer or offset adjustments using the adjustment type which is specified in the offset request. If the **Transfer Adjustment** option is selected in the respective offset request type, the system creates the transfer adjustments in the **Frozen** status.

The following table lists the transfer adjustments that are created during the cross currency offset with respect to the above example:

Transfer	**Transfer Adjustments**
1	• $11 transfer adjustment is created for Bill 1 and matched to -$250 bill segment cancellation (BS1) FT 1 • -€10 transfer adjustment is created for Bill 2 and matched to €10 bill segment (BS2) FT 2
2	• $22 transfer adjustment is created for Bill 1 and matched to -$250 bill segment cancellation (BS1) FT 1 • -€20 transfer adjustment is created for Bill 2 and matched to €20 bill segment (BS3) FT 3
3	• $55 transfer adjustment is created for Bill 1 and matched to -$250 bill segment cancellation (BS1) FT 1 • -€50 transfer adjustment is created for Bill 3 and matched to €50 bill segment (BS4) FT 4
4	• $33 transfer adjustment is created for Bill 1 and matched to -$250 bill segment cancellation (BS1) FT 1

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Transfer	Transfer Adjustments
	• -€30 transfer adjustment is created for Bill 4 and matched to €30 bill segment (BS5) FT 5
5	• $44 transfer adjustment is created for Bill 1 and matched to -$250 bill segment cancellation (BS1) FT 1 • -€40 transfer adjustment is created for Bill 4 and matched to €40 bill segment (BS6) FT 6

However, if the **Transfer Adjustment** option is not selected in the respective offset request type, the system creates the offset adjustments in the **Frozen** status. Considering the above example, the system will create the following offset adjustments for the offset request:

- $165 offset adjustment is created for Bill 1 and matched to -$250 Bill Segment Cancellation (BS1) FT 1
- -€10 offset adjustment is created for Bill 2 and matched to €10 bill segment (BS2) FT 2
- -€20 offset adjustment is created for Bill 2 and matched to €20 bill segment (BS3) FT 3
- -€50 offset adjustment is created for Bill 3 and matched to €50 bill segment (BS4) FT 4
- -€30 offset adjustment is created for Bill 4 and matched to €30 bill segment (BS5) FT 5
- -€40 offset adjustment is created for Bill 4 and matched to €40 bill segment (BS6) FT 6

Similarly, the transfer or offset adjustments are created when the bills are offset across accounts of the person and its hierarchy. The system distributes the amount from the credit bill starting with the oldest due date. For more information on how the offset amount is distributed, see C1-OFST-DIST on page 1589.

To use the cross currency offset request feature, you need to do the following:

- Define the required exchange rates in the system.
- Define a currency conversion algorithm for bill segments using the **C1_CURALGBS** or **C1_EXCRTBS** algorithm type and attach it to the **Currency Conversion For Bill Segments** algorithm spot of the required divisions.
- Define a currency conversion algorithm for adjustments using the **C1_CURALGAD** or **C1_EXCRTAD** algorithm type and attach it to the **Currency Conversion For Adjustments** algorithm spot of the required divisions.

You can create a cross currency offset request through the **Account Receivables Central** and **Offset Request** screens. For more information on how to create a cross currency offset request, see Creating an Offset Request on page 1624.

Prerequisites

To setup the offset request feature, you need to do the following:

- Define the required offset adjustment types where the **A/P Request Type Code** field is not set to **REFUND**.
- Define a default offset amount algorithm using the **C1-OFST-AMT** algorithm type.
- Assign the **C1-OFSRQ** To Do type to a To Do role whose users must receive a To Do while submitting an offset request for approval.
- Assign the **C1-OFSSB** To Do type to a To Do role whose users must not approve an offset request.
- Define the required offset request types in the system.
- Define the required characteristic types where the characteristic entity is set to **Offset Request Type**.
- Define the required characteristic types where the characteristic entity is set to **Offset Request**.
- Define the values for the **CAN_RSN_CD_FLG** lookup field.
- Set the parameters of the **C1-UPD-FUND**, **C1-DFRUNAPLY**, **C1-WTBS-CRBL**, and **C1-OFST-DIST** algorithms.
- Define the status reasons for the **Rejected** and **Unapplied Offset** statuses of the **C1-OffsetRequest** business object in the **Status Reason** screen.
- Set the **Allow Offsetting Across Persons** option type of the **C1-OFFSETREQ** feature configuration.
- Define the required exchange rates in the system.

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- Define a currency conversion algorithm for bill segments using the **C1_CURALGBS** or **C1_EXCRTBS** algorithm type.
- Attach a currency conversion algorithm to the **Currency Conversion For Bill Segments** algorithm spot of the required divisions.
- Define a currency conversion algorithm for adjustments using the **C1_CURALGAD** or **C1_EXCRTAD** algorithm type.
- Attach a currency conversion algorithm to the **Currency Conversion For Adjustments** algorithm spot of the required divisions.
- Set the batch control type of the **Offset Request Periodic Monitor (C1-OFSRQ)** batch to **Timed** and define the following attributes:
  - Time Interval
  - Timer Active
  - User ID
  - Batch Language
  - Email Address

  For more information about the **Offset Request Periodic Monitor (C1-OFSRQ)** batch, see *Oracle Revenue Management and Billing Batch Guide*.

Related Topics

For more information on...	See...
How to setup the **C1-OFFSETREQ** feature configuration	Setting the C1-OFFSETREQ Feature Configuration on page 4456
C1-OFST-AMT algorithm	C1-OFST-AMT on page 1599
C1-UPD-FUND algorithm	C1-UPD-FUND on page 1590
C1-DFRUNAPLY algorithm	C1-DFRUNAPLY on page 1590
C1-WTBS-CRBL algorithm	C1-WTBS-CRBL on page 1591
C1-OFST-DIST algorithm	C1-OFST-DIST on page 1589
C1_CURALGBS algorithm	C1_CURALGBS on page 1591
C1_EXCRTBS algorithm	C1_EXCRTBS on page 1593
C1_CURALGAD algorithm	C1_CURALGAD on page 1595
C1_EXCRTAD algorithm	C1_EXCRTAD on page 1596

Offset Request (Without Approval) Status Transition

The following figure graphically indicates how an offset request moves from one status to another when the approval process is not configured in the offset request type:

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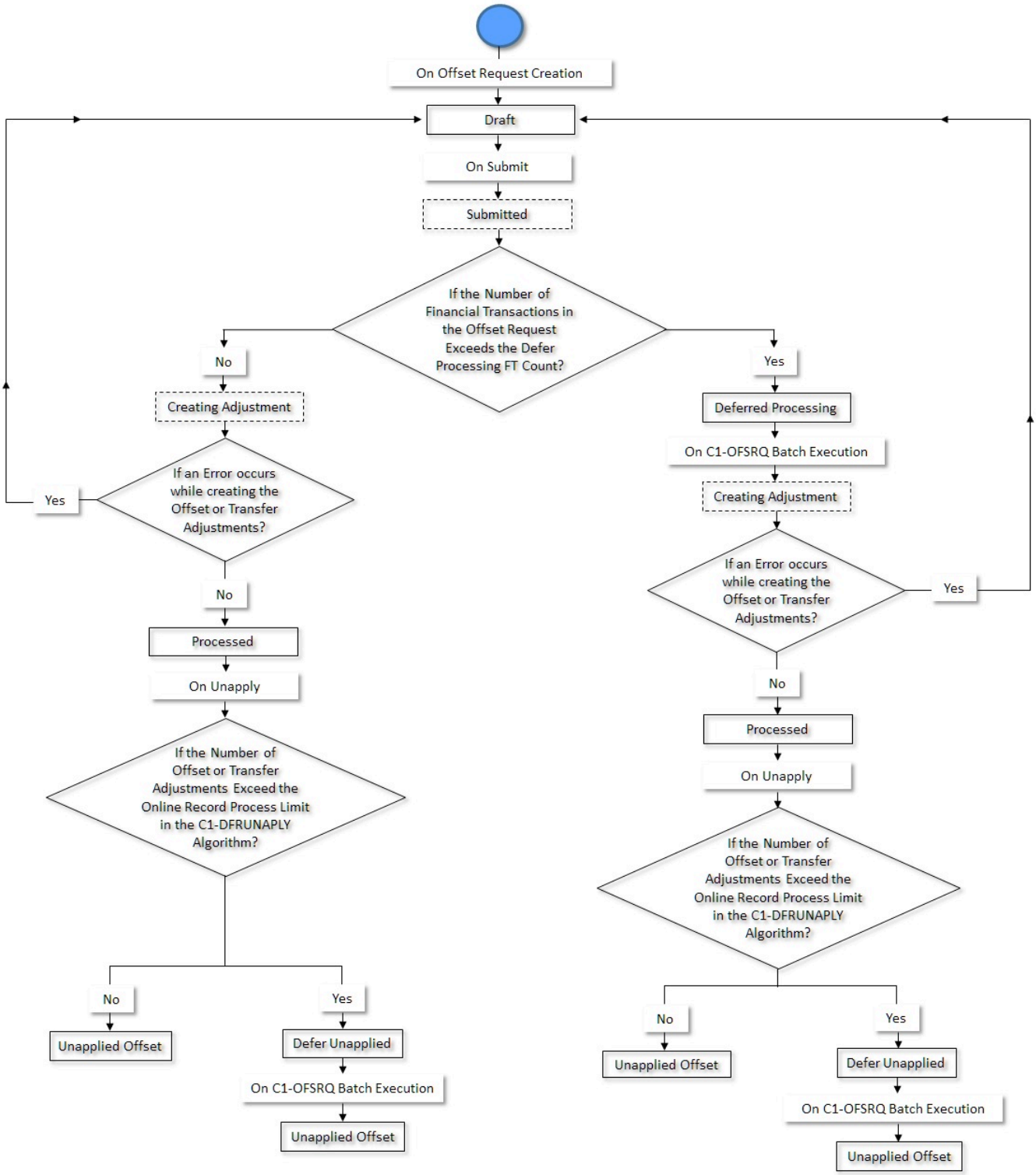

Offset Request (With Approval) Status Transition

The following figure graphically indicates how an offset request moves from one status to another when the approval process is configured in the offset request type:

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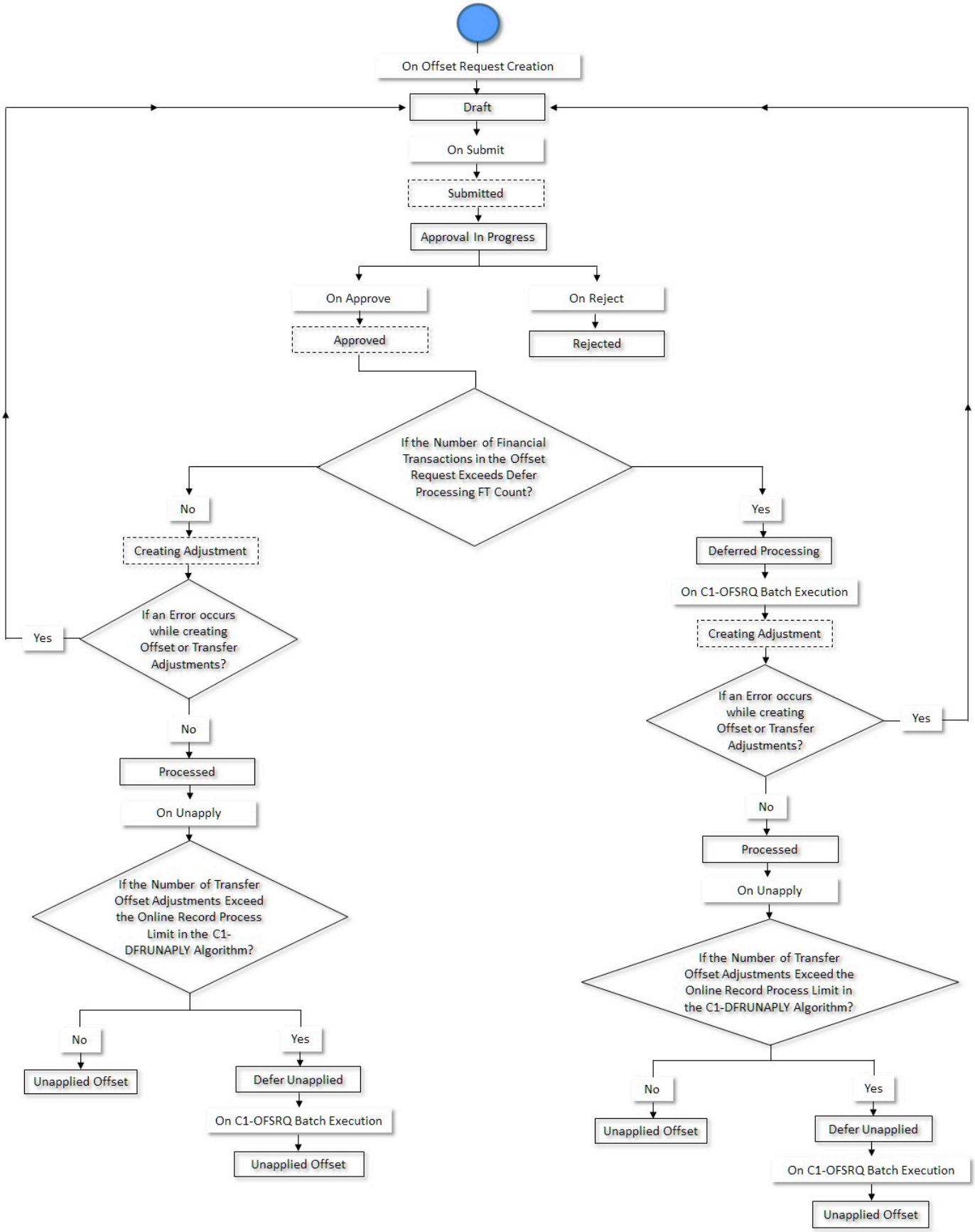

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Bill Line Items Level Offset

Until now, while offsetting two or more bills through an offset request, the system did not allow to consider a debit bill with a credit line item as a credit bill while offsetting. In addition, the system did not allow to add a bill with zero balance having debit and credit line items in an offset request.

Now, a new option named **Bill Line Items Level Offset** is available while defining an offset request type. If you select the **Bill Line Items Level Offset** option in an offset request type, the system allows you to do the following:

- Consider a debit bill with a credit line item as a credit bill while offsetting through an offset request
- Add a bill with zero balance having debit and credit line items in an offset request

For example, if you include a debit bill (BILL1) with the following line items in an offset request which is created using an offset request type where the **Bill Line Items Level Offset** option is selected:

Bill Line Item	**Amount**
BS1	100$
BS2	100$
BS3	200$
AD1	-200$

The system allows you add BILL1 as a credit bill in the offset request. Earlier, the system used to internally offset the bill and the outstanding bill amount was then available for offsetting with another bills in an offset request. Now, if you consider a debit bill with a credit line item as a credit bill for offsetting in an offset request, the system will not internally offset the bill and the credit line items would be available for offsetting with another bills in the offset request. However, if you do not consider a debit bill with a credit line item as a credit bill for offsetting in an offset request, the system will first internally offset the bill and then outstanding amount would be available for offsetting against another bills in the offset request.

If you select the **Bill Line Items Level Offset** option in an offset request type, you need to ensure that **Match Type Entity (Valid Values: BILL, BSEG, SA)** parameter in the **C1-OFST-DIST** algorithm (which is attached to the **Creating Adjustment** status in the lifecycle of the **C1-OffsetRequest** business object) is set to **BSEG**. Otherwise, erroneous results might occur.

If you create an offset request using an offset request type where the **Bill Line Items Level Offset** option is selected, then:

- The following columns are additionally available in the **Offset Details** section while editing the offset request:
  - **Debit Balance** - Displays the sum of the unpaid debit line items of a bill
  - **Credit Balance** - Displays the sum of the open credit line items of a bill
  - **Credit Bill** - Used to indicate whether you want to consider a debit bill with a credit line item as a credit bill in the offset request. By default, this option is selected for a bill with the credit or zero balance and it is not editable. Note that you cannot select this option for a debit bill which no credit line item and therefore, in such case, this option is disabled.
- The default offset amount is set either to the sum of open credit balance of all credit bills in the offset request or to the sum of outstanding amount of all debit bills in the offset request whichever is less. While editing the offset amount, the system validates the following:
  - Offset amount is not greater than the outstanding amount of the debit bill
  - Offset amount is not greater than the open credit balance of the credit bill
- The **Debit Balance**, **Credit Balance**, and **Credit Bill** columns appear in the **Selected Bills** zone of the **Offset Request** screen.

As mentioned earlier, the system now allows you to add a bill with zero balance having debit and credit line items in an offset request. You can add a bill with zero balance from the following screens:

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- Offset Request
- Account Receivable Central

While creating an offset request for a zero balance bill from the **Account Receivable Central** screen or while adding a zero balance bill to an offset request, the system validates the following:

- The **Bill Line Items Level Offset** option is selected the respective offset request type.
- The selected bill with zero balance is not fully matched.

We recommend you to add maximum 4 to 5 bills while offsetting the bills through an offset request using the **Bill Line Items Level Offset** feature.

Internal Offsetting of Zero Balance Bill

Oracle Revenue Management and Billing provides a new option type named **Avoid internal match event creation for zero dollar bill** in the **C1_FINTRANOP** feature configuration. You can set the value of this option type to:

- **Y** - Used when you do not want the system to internally match the debit and credit line items of a zero balance bill on the bill completion.
- **N** - Used when you want the system to internally match the debit and credit line items of a zero balance bill on the bill completion.

If you want to consider a zero balance bill for offsetting against another bills in an offset request, you should set the **Avoid internal match event creation for zero dollar bill** option type of the **C1_FINTRANOP** feature configuration to **Y**.

Automatic Offset of Debit and Credit Bill Line Items

The health insurance business do come across various scenarios wherein the customers would need a facility to automatically offset the debit and credit bill line items of an account. For example:

- An individual enrolls for a health plan. But the individual fails to pay the binder payment before the membership start date. Such individual memberships are canceled once the appropriate inbound message is received to cancel the individual membership. On canceling the individual membership, an adhoc invoice is generated in the system and the premium billed for the individual membership is reversed. In this scenario, you may want to automatically offset the debit and credit bill line items of the individual member's account.
- An individual enrolls for a health plan having subsidy. The subsidy fully covers the premium, and therefore a zero balance bill is generated. If you internally offset a zero balance bill, the system matches the debit and credit line items of a zero balance bill on the bill completion. But, in this case, the match events are not created at the bill line item level. In such scenario, you may want to automatically offset the debit and credit bill line items of the individual member's account such that match events are created at the bill line item level.

Oracle Revenue Management and Billing facilitates you with the auto maintenance process for accounts wherein the system will automatically offset the debit and credit bill line items of the accounts. The auto maintenance process is driven using the **Offset Request** feature ensuring that the match events are created at the bill line item level. Note that, at present, the auto maintenance process for accounts is only tested and certified for the fully insured group, fully insured individual, and fully insured group direct billed membership lines of business. In other words, the system will automatically offset the debit and credit bill line items of the parent customers', bill groups', and direct billed memberships' accounts.

While running the auto maintenance process for an account, the system creates an auto maintenance offset request for the account when either of the following criteria is met:

- Total amount of the open and unmatched items of the account is equal to zero. For example, an A1 account has two bills - B1 for Jan 2023 with the open balance 200 and B2 for Feb 2023 with the open balance -200 and thereby the A1 account balance is zero.
- Total amount of the open and unmatched items of the account in a specific coverage period is equal to zero. For example, an A2 account has three bills - B1 for Jan 2023 with the open balance 300, B2 for Feb 2023 with the open

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balance 300, and B3 for Feb 2023 with the open balance -300. Here, the overall account balance of A2 is not zero, but the account balance of A2 for Feb 2023 is zero.

Note: While running the auto maintenance process for an account, the system does not consider the payments applied on the On Account, Excess Credit, and Suspense contracts of the account.

The system creates an auto maintenance offset request for an account using an offset request type where the offset category is set to **Auto Maintenance**. A new field named **Offset Category** is available while defining an offset request type. It helps to differentiate between the traditional (i.e. manual) offset requests and automatic offset requests. If you want to create a manual offset request using an offset request type, you must set the offset category in the offset request type to **Regular**. However, if you want to create an automatic offset request using an offset request type, you must set the offset category in the offset request type to **Auto Maintenance**. By default, the offset category is set to **Regular**. Note that you cannot edit the offset category in an offset request type when an offset request is already created using the offset request type.

The system enables you to skip a set of accounts for which auto maintenance is not required. A new field named **SKIP_AUTOM_SW** is added in the **CI_ACCT** table. It indicates whether you want to skip auto maintenance for the account. At present, you can provide the skip auto maintenance information for an account through a healthcare inbound message and not from the user interface. The system then displays the skip auto maintenance information of an account in the **Main** section of the **Account Information** zone on the **Account** tab of the **Customer 360° Information** screen. Note that the **Skip Auto Maintenance** field appears in the **Main** section for the account only when it is set to **Y**.

To use the auto maintenance feature for accounts, you need to do the following:

- Create an offset request type where the offset category is set to **Auto Maintenance**

  Note: While creating an offset request type for auto maintenance of accounts, you need to ensure that the **Bill Line Items Level Offset** option is selected and the **Transfer Adjustment** option is not selected.
- Set the **Avoid internal match event creation for zero dollar bill** option type of the **C1_FINTRANOP** feature configuration to **Y**

A new batch named **C1-AUTOM** is introduced in this release. It considers those accounts for auto maintenance where the **Skip Auto Maintenance** field is set to **N**. It then checks whether either of the following criteria is met for the account:

- Total amount of the open and unmatched items of the account is equal to zero
- Total amount of the open and unmatched items of the account in a specific coverage period is equal to zero

Here, the system considers the eligible accounts with zero and non-zero balance. If the eligible account has zero balance, the system considers the bills with zero and non-zero balance where the open and unmatched debit and credit line items can be offset. If the eligible account has non-zero balance, the system considers the bills with zero and non-zero balance where the open and unmatched debit and credit line items of the same coverage period can be offset.

If either of the above two criteria is met, the system creates and processes an auto maintenance offset request. The auto maintenance offset request automatically closes the open and unmatched bill line items of the account that amounts to zero balance. To close an open and unmatched bill line item of the account, the system creates an offset request adjustment against each such debit or credit financial transaction. If the match event is present on any financial transaction, the same match event is stamped on the offset request adjustment. However, if the match event does not exist on any financial transaction, the system creates a new match event and stamps it against the financial transaction and its corresponding offset request adjustment.

This batch is a multi-threaded batch. The multi-threading is based on account ID and chunks for multi-threading are created based on numerical distribution of account ID. This batch contains the following parameters:

Parameter Name	Mandatory (Yes or No)	Description
Division	Yes (Conditional)	Used when you want to run the auto maintenance process for the accounts which belong to a particular division. **Note:** This parameter is required when you specify a customer class while executing this batch.

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Parameter Name	Mandatory (Yes or No)	Description
Customer Class	No	Used when you want to run the auto maintenance process for the accounts which belong to a particular customer class.
Offset Request Type	Yes	Used to indicate the offset request type using which you want to create auto maintenance offset requests for the accounts. **Note:** Here, you must specify an offset request type where the offset category is set to **Auto Maintenance**.
Freeze Number of Days	Yes	Used to specify the number of days. The system considers those accounts for auto maintenance whose financial transactions are frozen in the last specified number of days. **Note:** The parameter value must be greater than or equal to zero.
Skip Auto Maintenance for Accounts with Open Refund or Write Off Request (Y/N)	Yes	Used to indicate whether you want to skip auto maintenance for those accounts for which the refund or write off request is still in the non-final status. The valid values are: • Y • N **Note:** By default, the parameter value is set to **Y**.
Skip Auto Maintenance for Accounts with Open Payment, Payment Transfer Request (Y/N)	Yes	Used to indicate whether you want to skip auto maintenance for those accounts for which the payment creation or payment transfer request is still in the non-final status. The valid values are: • Y • N **Note:** By default, the parameter value is set to **Y**
Skip Auto Maintenance for Accounts with Open Offset Request (Y/N)	Yes	Used to indicate whether you want to skip auto maintenance for those accounts for which the manual offset request is still in the non-final status. The valid values are: • Y • N **Note:** By default, the parameter value is set to **Y**
Account ID	No	Used when you want to run the auto maintenance process for a particular account.
Fetch Only Open Overdue Bills	Yes	Used to indicate whether you want to consider the overdue bills or all the open bills of the account for auto maintenance. The valid values are:

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Parameter Name	Mandatory (Yes or No)	Description
		• **Y** - Used when you want to consider only the overdue bills of the account for auto maintenance. • **N** - Used when you want to consider all the open bills of the account for auto maintenance. **Note:** By default, the parameter value is set to **Y**.
Thread Pool Name	No	Used to specify the thread pool on which you want to execute the batch.

On successful completion of this batch, the system creates and processes an auto maintenance offset request for an account that meets the criteria. You can view the details of an auto maintenance offset request through the **Offset Request** screen.

While viewing the details of an auto maintenance offset request, the system displays the **Auto Maintenance Financial Transactions** zone instead of the **Selected Bills** and **Offset Request Adjustments** zones in the **Main** tab of the **Offset Request** screen. The system also displays the account information in the **Main** section of the **Offset Request** zone. The **Auto Maintenance Financial Transactions** zone lists the financial transactions of the account for which the corresponding offset request adjustments are created during the auto maintenance process.

To design the auto maintenance process for accounts, the following algorithms are enhanced:

- **C1-OFFSUBENT** - Here, some of the existing validations are skipped for an auto maintenance offset request and few new validations are introduced for an auto maintenance offset request.
- **C1-OFST-DIST** - Here, additional logic is added to handle the offset category and to create auto maintenance offset requests for accounts that meet the criteria. Note that the **Match Type**, **Match Type Entity**, and **Credit Bill Distribution Algorithm** parameters are not applicable while creating offset request adjustments for an auto maintenance offset request.

The system enables you to cancel an auto maintenance offset request, if required, through the **Unapply** button. While canceling an offset request, you need to specify a reason why you want to cancel an offset request. On canceling an auto maintenance offset request, the system cancels the offset request adjustments and opens the corresponding bill line items which were offset during auto maintenance of the account.

FT Extension Record on Offset Request Adjustment Freeze

Oracle Revenue Management and Billing enables you to create financial transaction extension record in the **C1_FT_EXT** table whenever an adjustment financial transaction is frozen. A new algorithm type named **C1-STMPADFTX** is introduced in this release. It should be attached to the **Adjustment Freeze** system event of the respective adjustment type. This algorithm does the following:

- Creates a FT extension record in the **C1_FT_EXT** table whenever an adjustment financial transaction is frozen. The following details required for the FT extension record are derived from the related revenue financial transaction using the match event ID - Policy ID, Plan ID, Start Date, End Date, Membership ID, Related Revenue Financial Transaction ID, Health Plan Code, and Price Item Code.
- Splits the GL lines of the adjustment financial transaction based on the respective related revenue financial transaction. The GL split is done only when the **General Ledger Split Required** parameter in the algorithm is set to **Y**.

You need to attach an algorithm created using the **C1-STMPADFTX** algorithm type to the **Adjustment Freeze** system event of the offset request adjustment types. The system will then create FT extension records for the offset request adjustments while freezing the respective financial transactions.

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Algorithms Used in C1-OffsetRequest

The following table lists the algorithm which is attached to the **C1-OffsetRequest** business object:

System Event	Algorithm	Algorithm Type	Description
Information	C1-OFFST-INF	C1-OFFST-INF	Refer to C1-OFFST-INF on page 1588.

The following table lists the algorithms which are used in the lifecycle of the **C1-OffsetRequest** business object:

Status	System Event	Algorithm	Algorithm Type	Description
Draft	Exit	F1-TODOCOMPL	F1-TODOCOMPL	Refer to F1-TODOCOMPL on page 1469.
Submitted	Enter	C1-OFFSUBENT	C1-OFFSUBENT	Refer to C1-OFFSUBENT on page 1588.
Approval In Progress	Enter	C1-OFFAPPENT	C1-OFFAPPENT	Refer to C1-OFFAPPENT on page 1588.
	Exit	C1-OFFAPPEXT	C1-OFFAPPEXT	Refer to C1-OFFAPPEXT on page 1589.
	Exit	F1-TODOCOMPL	F1-TODOCOMPL	Refer to F1-TODOCOMPL on page 1469.
Approved	Enter	C1-OFSAPRENT	C1-OFSAPRENT	Refer to C1-OFSAPRENT on page 1589.
Rejected	-	-	-	-
Deferred Processing	Monitor	F1-AT-RQJ	F1-GEN-BOMNJ	Refer to F1-AT-RQJ on page 225.
Creating Adjustment	Monitor	F1-AT-RQJ	F1-GEN-BOMNJ	Refer to F1-AT-RQJ on page 225.
	Enter	C1-OFST-DIST	C1-OFST-DIST	Refer to C1-OFST-DIST on page 1589.
	Enter	C1-UPD-HOLD	C1-UPD-HOLD	Refer to C1-UPD-HOLD on page 1590.
	Enter	C1-UPD-FUND	C1-UPD-FUND	Refer to C1-UPD-FUND on page 1590.
Processed	-	-	-	-
Defer Unapplied	Monitor	F1-AT-RQJ	F1-GEN-BOMNJ	Refer to F1-AT-RQJ on page 225.
	Enter	C1-DFRUNAPLY	C1-DFRUNAPLY	Refer to C1-DFRUNAPLY on page 1590.
Unapplied Offset	Enter	C1-UNAPOFST	C1-UNAPOFST	Refer to C1-UNAPOFST on page 1591.
	Enter	C1-UPDT-FUND	C1-UPDT-FUND	Refer to C1-UPDT-FUND on page 1591.

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C1-OFFST-INF

This algorithm generates the offset request information string which appears throughout the application. It concatenates the following fields separated by a comma in the specified order:

1. Offset Request Type Description
2. Offset Request Status Description
3. Offset Request ID

F1-TODOCOMPL

This algorithm completes the To Do entries that are linked to an object when the object exits the given status. It finds and completes all open To Do entries where the business object's primary key is defined as a drill key. However, if the **Exclude To Do Entries From Auto Completion** (**F1-EXLTD**) characteristic is set to **Y** for a To Do type, the system does not automatically complete the respective To Do entry.

This algorithm contains the following parameter:

- **'Do Not Complete To Do Type' Char Type** – Used to specify the characteristic type that indicates whether the To Do entries should be automatically completed or not.

> **Note:** The **F1-EXLTD** characteristic type is shipped with the product. You can either use the **F1-EXLTD** characteristic type or a custom characteristic type, if required. Note that you must specify a predefined characteristic type where the characteristic entity is set to **To Do Type** and the predefined values are set to **Y** or **N**.

C1-OFFSUBENT

This algorithm is invoked when you click the **Submit** button. It validates the following:

- Whether the outstanding amount of the selected bills is not zero
- Whether the selected bills are in the **Complete** status
- Whether the overridden offset amount of a bill is not zero
- Whether the sum of the debit bills' offset amount is equal to the sum of the credit bills' offset amount
- Whether at least one debit and credit bills are selected in the offset request

If the validation is successful, it checks whether the **Approval Required** option is selected in the respective offset request type. If the **Approval Required** option is selected in the respective offset request type, it changes the status of the offset request to **Approval In Progress**. However, if the **Approval Required** option is not selected in the respective offset request type, it checks whether the number of financial transactions created for the bills, which are selected in the offset request, exceeds the defer processing count. If the number of financial transactions does not exceed the defer processing count, the system changes the status of the offset request to **Creating Adjustment**. However, if the number of financial transactions exceeds the defer processing count, the system changes the status of the offset request to **Deferred Processing**.

C1-OFFAPPENT

This algorithm is invoked when the status of the offset request is changed to **Approval In Progress**. It creates a To Do using the approval To Do type which is specified in the respective offset request type. Once a To Do is created, it is assigned to all users with the approval To Do role which is specified in the respective offset request type. In addition, it creates a log entry for the offset request when the To Do is created.

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C1-OFFAPPEXT

This algorithm checks whether the approver is associated with the approval To Do role which is specified in the respective offset request type. If so, it allows the approver to approve or reject the offset request. It also ensures that the submitter does not approve or reject the offset request.

C1-OFSAPRENT

This algorithm is invoked when you click the **Approve** button. It checks whether the number of financial transactions created for the bills, which are selected in the offset request, exceeds the defer processing count. If the number of financial transactions does not exceed the defer processing count, the system changes the status of the offset request to **Creating Adjustment**. However, if the number of financial transactions exceeds the defer processing count, the system changes the status of the offset request to **Deferred Processing**.

F1-AT-RQJ

This algorithm transitions the current status of the business object to the specified status. It contains the following parameters:

- **Next Status** – Used when you want to override the default next status specified in the lifecycle.
- **Next Transition Condition** – Used when you want to override the default next transition condition specified in the lifecycle.

At a time, you can specify value for either the **Next Status** or **Next Transition Condition** parameter. If you don't specify any value for these parameters, the system will transition the business object to the default next status specified in its lifecycle.

C1-OFST-DIST

This algorithm is invoked when the status of the offset request is changed to **Creating Adjustment**. It creates offset adjustments using the adjustment type specified in the offset request and sets the status of the offset adjustments to **Frozen**. If the **Transfer Adjustment** option is selected in the respective offset request type, it creates transfer adjustments in the **Frozen** status.

This algorithm distributes the offset amount of a bill in the following manner:

1. **Internal Offsetting Within Each Bill** - This happens when a bill contains both debit and credit line items. The internal offsetting happens either at the bill segment or contract level depending on the value specified in the **Match Type Entity (Valid Values: BILL, BSEG, SA)** parameter. If the **Match Type Entity (Valid Values: BILL, BSEG, SA)** parameter is set to **BILL** or **SA**, the internal offsetting happens at the contract level. However, if the **Match Type Entity (Valid Values: BILL, BSEG, SA)** parameter is set to **BSEG**, the internal offsetting happens at the bill segment level. In the bill, the internal offsetting is done starting from a credit contract with highest payment priority against a debit contract with highest payment priority by creating transfer adjustments. This continues until the sum of credit or debit amount within a bill is exhausted.
2. **Offsetting Across Debit and Credit Bills** - This offsetting is always done from the credit bills to the debit bills with the objective to reduce the debit bill balance. This algorithm checks whether any match event is created for the bill. If so, it creates the offset adjustments against the bill using the existing match event. If there are no match events created for the bill, this algorithm creates match events using the value specified in the **Match Type Entity (Valid Values: BILL, BSEG, SA)** parameter. It distributes the amount from the credit bill starting with the oldest due date. This continues until the credit bill balance is exhausted.

It contains the following parameters:

- **Match Type** - Used to specify the match type using which you want to distribute the offset amount. You must specify a match type where the payment distribution override algorithm is attached.

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> **Note:** If a bill which is offset is partially paid using a match type, this algorithm uses the same match type for offset distribution. However, if no payment is received for a bill which is offset, this algorithm uses the match type which is specified in the **Match Type** parameter for offset distribution.

- **Match Type Entity (Valid Values: BILL, BSEG, SA)** - Used to indicate the entity, such as bill, bill segment, or contract, against which you want to create match event. It is used to create match events for bills which are unpaid. The valid values are:
  - **BILL** - Used when you want to stamp same match event on all financial transactions of the bill.
  - **BSEG** - Used when you want to stamp unique match event on each bill segment or adjustment financial transaction.
  - **SA** - Used when you want to stamp same match event on all financial transactions which are created for the same contract.
- **Credit Bill Distribution Algorithm** - Used to specify an algorithm which helps to create offset adjustments for a credit bill at the bill segment level. This parameter is required when the **Transfer Adjustment** option is not selected in the respective offset request type.

> **Note:** The **C1-WTBS-CRBL** algorithm type is shipped with the product. You can attach an algorithm created using the **C1-WTBS-CRBL** algorithm type to the **Credit Bill Distribution Algorithm** parameter. For more information, see C1-WTBS-CRBL on page 1591.

C1-UPD-HOLD

This algorithm updates the hold request whenever a bill on hold is offset through an offset request. If the remaining outstanding amount of a bill after offsetting is not zero and is less than the current hold amount, this algorithm updates the hold amount to the current hold amount plus remaining outstanding bill balance. For example, if the original outstanding amount is 80$, hold amount is 40$, offset amount is 20$, then the remaining outstanding amount (i.e. 80-40-20$=20$) is less than the current hold amount (i.e. 40$). Therefore, this algorithm updates the hold amount of the bill in the hold request to 60$ (i.e. 40$+20$).

However, if the remaining outstanding amount of a bill after offsetting is zero and the bill is included in any active hold request, the hold end date of the bill in the hold request is changed to the system date.

In both the above scenarios, this algorithm creates a log entry for the offset and hold requests. The bill whose hold details (i.e. either hold amount or hold end date) are updated through the offset request is maintained in its log. Similarly, the old and updated hold amount and hold end date of the bill are maintained in the respective hold request log.

C1-UPD-FUND

If a bill which is offset through an offset request is present in a funding request which is in the **Draft** status, this algorithm updates the funding amount of the bill in the funding request. If entire sum of the funding and garnishment amount of a bill is offset through the offset request, the bill is excluded from the funding request.

It contains the following parameter:

- **Funding Exclusion Reason Code** - Used to indicate the reason why you want to exclude the bill from the funding request. This parameter is mandatory while excluding a bill from a funding request. You must specify a value which is already defined in the **CAN_RSN_CD_FLG** lookup field.

C1-DFRUNAPLY

This algorithm is invoked when you click the **Unapply** button. It checks whether the number of transfer or offset adjustments created through the offset request exceeds the online record process limit defined in this algorithm. If the number of transfer or offset adjustments does not exceed the online record process limit, the system cancels the frozen transfer or offset adjustments immediately and then changes the status of the offset request to **Unapplied Offset**.

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However, if the number of transfer or offset adjustments exceeds the online record process limit, the system changes the status of the offset request to **Defer Unapplied**.

It contains the following parameter:

- **Online Record Process Limit** - Used to indicate the maximum number of transfer or offset adjustments you can process in the real time (i.e. immediately).

C1-UNAPOFST

This algorithm is invoked when the **Offset Request Periodic Monitor (C1-OFSRQ)** batch is executed. It cancels all transfer or offset adjustments created through the offset request and then changes the status of the offset request to **Unapplied Offset**.

C1-UPDT-FUND

Once the transfer or offset adjustments of a bill are canceled, it checks whether the bill is included in any funding request which is in the **Draft** status. If so, it updates the funding amount of the bill in the respective funding request.

C1-WTBS-CRBL

THIS ALGORITHM IS ONLY USED IF YOU PRACTICE OPEN-ITEM ACCOUNTING AND THE ACCOUNT'S CUSTOMER CLASS INDICATES OPEN-ITEM ACCOUNTING IS PRACTICED.

This algorithm is used to offset the bill segments of a credit bill. It considers the bill segments of a credit bill for offsetting based on the following parameter:

- **Bill Segment Date Type** - Used to indicate whether the system should consider the bill segments of a credit bill based on the freeze date or coverage start date. The valid values are:
  - **F** - Used when you want to consider the bill segments of a credit bill based on the order of the freeze date.
  - **C** - Used when you want to consider the bill segments of a credit bill based on the order of the coverage start date. Note that you can use this option when the coverage start date is stamped corresponding to the financial transactions in the **C1_FT_EXT** table.

It creates a unique match event for each bill segment and adjustment financial transaction.

C1_CURALGBS

The **C1_CURALGBS** algorithm type is used to convert the amount in one currency to another currency using date based exchange rate. You can define date or date and time based global and division-specific exchange rates. The system might use the direct division-specific or global exchange rate (i.e. FROM CCY to TO CCY) or direct reverse division-specific or global exchange rate (i.e. TO CCY to FROM CCY) during currency conversion. If either direct or direct reverse exchange rate is not available, the system might use division-specific or global exchange rate through base currency during currency conversion. For example, if the FROM CCY is Canadian Dollars, TO CCY is Japanese Yen, and the division's base currency is U.S. Dollars, the system will first convert the amount from Canadian Dollars to U.S. Dollars and then convert the amount from U.S. Dollars to Japanese Yen.

The system allows you to indicate the order, in which the exchange rate must be searched, in the currency conversion algorithm. If you use the **Direct Rate First** search order, the system searches for an exchange rate in the specified order:

1. Division-specific direct exchange rate
2. Global direct exchange rate
3. Division-specific direct reverse exchange rate (if the **Division Reverse Rate** parameter is set to **Yes**)
4. Global direct reverse exchange rate (if the **Global Reverse Rate** parameter is set to **Yes**)

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5. Division-specific exchange rate through base currency
6. Division-specific reverse exchange rate through base currency (if the **Division Reverse Rate** parameter is set to **Yes**)
7. Global exchange rate through base currency
8. Global reverse exchange rate through base currency (if the **Global Reverse Rate** parameter is set to **Yes**)

If you use the **Division First** search order, the system searches for an exchange rate in the specified order:

1. Division-specific direct exchange rate
2. Division-specific direct reverse exchange rate (if the **Division Reverse Rate** parameter is set to **Yes**)
3. Division-specific exchange rate through base currency
4. Division-specific reverse exchange rate through base currency (if the **Division Reverse Rate** parameter is set to **Yes**)
5. Global direct exchange rate
6. Global direct reverse exchange rate (if the **Global Reverse Rate** parameter is set to **Yes**)
7. Global exchange rate through base currency
8. Global reverse exchange rate through base currency (if the **Global Reverse Rate** parameter is set to **Yes**)

You need to attach an algorithm of the **C1_CURALGBS** algorithm type on the **Currency Conversion For Bill Segments** algorithm spot of the division for which you want to enable the currency conversion feature. Once the algorithm is attached, the currency conversion will take place during:

- Bill Segment Generation
- FT GL Creation for Bill Segments

The **C1_CURALGBS** algorithm type contains the following parameters:

Parameter	Description	Mandatory (Yes or No)
Override Base Currency	Used to specify the base currency. This will override division's base currency while searching for an exchange rate through base currency.	No
Conversion Type	Used when you want to use the exchanges rates with a particular conversion type during currency conversion. **Note:** The parameter value must be already defined as a value in the **CONV_TYPE_FLG** lookup field.	No
Search Order (Valid Values: Division First, Direct Rate First)	Used to indicate the order in which you want to search for an exchange rate during currency conversion. The valid values are: • Direct Rate First • Division First If you do not specify the value for this parameter, by default, the system uses the **Division First** search order.	No
Division Reverse Rate (Valid Values: Yes, No)	Used to indicate whether you want the system to search for division-specific reverse exchange rate (i.e. To CCY to From CCY). The valid values are: • Yes • No If you do not specify the value for this parameter, by default, the system does not use the division-specific reverse exchange rate.	No

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Parameter	Description	Mandatory (Yes or No)
Global Reverse Rate (Valid Values: Yes, No)	Used to indicate whether you want the system to search for global reverse exchange rate (i.e. To CCY to From CCY). The valid values are: • Yes • No If you do not specify the value for this parameter, by default, the system does not use the global reverse exchange rate.	No

Related Topics

For more information on...	See...
Bill Segment Generation	Bill Segment Generation
FT GL Creation	FT GL Creation
How to setup the currency conversion feature	Prerequisites

C1_EXCRTBS

The **C1_EXCRTBS** algorithm type is used to convert the amount in one currency to another currency using date and time based exchange rate. You can define date or date and time based global and division-specific exchange rates. The system might use the direct division-specific or global exchange rate (i.e. FROM CCY to TO CCY) or direct reverse division-specific or global exchange rate (i.e. TO CCY to FROM CCY) during currency conversion. If either direct or direct reverse exchange rate is not available, the system might use division-specific or global exchange rate through base currency during currency conversion. For example, if the FROM CCY is Canadian Dollars, TO CCY is Japanese Yen, and the division's base currency is U.S. Dollars, the system will first convert the amount from Canadian Dollars to U.S. Dollars and then convert the amount from U.S. Dollars to Japanese Yen.

The system allows you to indicate the order, in which the exchange rate must be searched, in the currency conversion algorithm. If you use the **Direct Rate First** search order, the system searches for an exchange rate in the specified order:

1. Division-specific direct exchange rate
2. Global direct exchange rate
3. Division-specific direct reverse exchange rate (if the **Division Reverse Rate** parameter is set to **Yes**)
4. Global direct reverse exchange rate (if the **Global Reverse Rate** parameter is set to **Yes**)
5. Division-specific exchange rate through base currency
6. Division-specific reverse exchange rate through base currency (if the **Division Reverse Rate** parameter is set to **Yes**)
7. Global exchange rate through base currency
8. Global reverse exchange rate through base currency (if the **Global Reverse Rate** parameter is set to **Yes**)

If you use the **Division First** search order, the system searches for an exchange rate in the specified order:

1. Division-specific direct exchange rate
2. Division-specific direct reverse exchange rate (if the **Division Reverse Rate** parameter is set to **Yes**)
3. Division-specific exchange rate through base currency
4. Division-specific reverse exchange rate through base currency (if the **Division Reverse Rate** parameter is set to **Yes**)
5. Global direct exchange rate
6. Global direct reverse exchange rate (if the **Global Reverse Rate** parameter is set to **Yes**)
7. Global exchange rate through base currency
8. Global reverse exchange rate through base currency (if the **Global Reverse Rate** parameter is set to **Yes**)

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You need to attach an algorithm of the **C1_EXCRTBS** algorithm type on the **Currency Conversion For Bill Segments** algorithm spot of the division for which you want to enable the currency conversion feature. Once the algorithm is attached, the currency conversion will take place during:

- Bill Segment Generation
- FT GL Creation for Bill Segments

The **C1_EXCRTBS** algorithm type contains the following parameters:

Parameter	Description	Mandatory (Yes or No)
Override Base Currency	Used to specify the base currency. This will override division's base currency while searching for an exchange rate through base currency.	No
Conversion Type	Used when you want to use the exchanges rates with a particular conversion type during currency conversion. **Note:** The parameter value must be already defined as a value in the **CONV_TYPE_FLG** lookup field.	No
Search Order (Valid Values: Division First, Direct Rate First)	Used to indicate the order in which you want to search for an exchange rate during currency conversion. The valid values are: • Direct Rate First • Division First If you do not specify the value for this parameter, by default, the system uses the **Division First** search order.	No
Division Reverse Rate (Valid Values: Yes, No)	Used to indicate whether you want the system to search for division-specific reverse exchange rate (i.e. To CCY to From CCY). The valid values are: • Yes • No If you do not specify the value for this parameter, by default, the system does not use the division-specific reverse exchange rate.	No
Global Reverse Rate (Valid Values: Yes, No)	Used to indicate whether you want the system to search for global reverse exchange rate (i.e. To CCY to From CCY). The valid values are: • Yes • No If you do not specify the value for this parameter, by default, the system does not use the global reverse exchange rate.	No
Exchange Rate Override Algorithm	Used to attach a custom algorithm when you want to use an exchange rate search mechanism other than the one defined in this algorithm.	No
Exchange Rate Source	Used when you want to use the exchanges rates received from a particular source during currency conversion. **Note:** The parameter value must be already defined as a value in the **EXCH_RATE_SRC_FLG** lookup field.	No

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Related Topics

For more information on...	See...
Bill Segment Generation	Bill Segment Generation
FT GL Creation	FT GL Creation
How to setup the currency conversion feature	Prerequisites

C1_CURALGAD

The **C1_CURALGAD** algorithm type is used to convert the amount in one currency to another currency using date based exchange rate. You can define date or date and time based global and division-specific exchange rates. The system might use the direct division-specific or global exchange rate (i.e. FROM CCY to TO CCY) or direct reverse division-specific or global exchange rate (i.e. TO CCY to FROM CCY) during currency conversion. If either direct or direct reverse exchange rate is not available, the system might use division-specific or global exchange rate through base currency during currency conversion. For example, if the FROM CCY is Canadian Dollars, TO CCY is Japanese Yen, and the division's base currency is U.S. Dollars, the system will first convert the amount from Canadian Dollars to U.S. Dollars and then convert the amount from U.S. Dollars to Japanese Yen.

The system allows you to indicate the order, in which the exchange rate must be searched, in the currency conversion algorithm. If you use the **Direct Rate First** search order, the system searches for an exchange rate in the specified order:

1. Division-specific direct exchange rate
2. Global direct exchange rate
3. Division-specific direct reverse exchange rate (if the **Division Reverse Rate** parameter is set to **Yes**)
4. Global direct reverse exchange rate (if the **Global Reverse Rate** parameter is set to **Yes**)
5. Division-specific exchange rate through base currency
6. Division-specific reverse exchange rate through base currency (if the **Division Reverse Rate** parameter is set to **Yes**)
7. Global exchange rate through base currency
8. Global reverse exchange rate through base currency (if the **Global Reverse Rate** parameter is set to **Yes**)

If you use the **Division First** search order, the system searches for an exchange rate in the specified order:

1. Division-specific direct exchange rate
2. Division-specific direct reverse exchange rate (if the **Division Reverse Rate** parameter is set to **Yes**)
3. Division-specific exchange rate through base currency
4. Division-specific reverse exchange rate through base currency (if the **Division Reverse Rate** parameter is set to **Yes**)
5. Global direct exchange rate
6. Global direct reverse exchange rate (if the **Global Reverse Rate** parameter is set to **Yes**)
7. Global exchange rate through base currency
8. Global reverse exchange rate through base currency (if the **Global Reverse Rate** parameter is set to **Yes**)

You need to attach an algorithm of the **C1_CURALGAD** algorithm type on the **Currency Conversion For Adjustments** algorithm spot of the division for which you want to enable the currency conversion feature. Once the algorithm is attached, the currency conversion will take place during:

- Adjustment Creation
- FT GL Creation for Adjustments

The **C1_CURALGAD** algorithm type contains the following parameters:

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Parameter	Description	Mandatory (Yes or No)
Override Base Currency	Used to specify the base currency. This will override division's base currency while searching for an exchange rate through base currency.	No
Conversion Type	Used when you want to use the exchanges rates with a particular conversion type during currency conversion. **Note:** The parameter value must be already defined as a value in the **CONV_TYPE_FLG** lookup field.	No
Search Order (Valid Values: Division First, Direct Rate First)	Used to indicate the order in which you want to search for an exchange rate during currency conversion. The valid values are: • Direct Rate First • Division First If you do not specify the value for this parameter, by default, the system uses the **Division First** search order.	No
Division Reverse Rate (Valid Values: Yes, No)	Used to indicate whether you want the system to search for division-specific reverse exchange rate (i.e. To CCY to From CCY). The valid values are: • Yes • No If you do not specify the value for this parameter, by default, the system does not use the division-specific reverse exchange rate.	No
Global Reverse Rate (Valid Values: Yes, No)	Used to indicate whether you want the system to search for global reverse exchange rate (i.e. To CCY to From CCY). The valid values are: • Yes • No If you do not specify the value for this parameter, by default, the system does not use the global reverse exchange rate.	No

Related Topics

For more information on...	See...
Adjustment Creation	Adjustment Creation
FT GL Creation	FT GL Creation
How to setup the currency conversion feature	Prerequisites

C1_EXCRTAD

The **C1_EXCRTAD** algorithm type is used to convert the amount in one currency to another currency using date and time based exchange rate. You can define date or date and time based global and division-specific exchange rates. The system might use the direct division-specific or global exchange rate (i.e. FROM CCY to TO CCY) or direct reverse

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division-specific or global exchange rate (i.e. TO CCY to FROM CCY) during currency conversion. If either direct or direct reverse exchange rate is not available, the system might use division-specific or global exchange rate through base currency during currency conversion. For example, if the FROM CCY is Canadian Dollars, TO CCY is Japanese Yen, and the division's base currency is U.S. Dollars, the system will first convert the amount from Canadian Dollars to U.S. Dollars and then convert the amount from U.S. Dollars to Japanese Yen.

The system allows you to indicate the order, in which the exchange rate must be searched, in the currency conversion algorithm. If you use the **Direct Rate First** search order, the system searches for an exchange rate in the specified order:

1. Division-specific direct exchange rate
2. Global direct exchange rate
3. Division-specific direct reverse exchange rate (if the **Division Reverse Rate** parameter is set to **Yes**)
4. Global direct reverse exchange rate (if the **Global Reverse Rate** parameter is set to **Yes**)
5. Division-specific exchange rate through base currency
6. Division-specific reverse exchange rate through base currency (if the **Division Reverse Rate** parameter is set to **Yes**)
7. Global exchange rate through base currency
8. Global reverse exchange rate through base currency (if the **Global Reverse Rate** parameter is set to **Yes**)

If you use the **Division First** search order, the system searches for an exchange rate in the specified order:

1. Division-specific direct exchange rate
2. Division-specific direct reverse exchange rate (if the **Division Reverse Rate** parameter is set to **Yes**)
3. Division-specific exchange rate through base currency
4. Division-specific reverse exchange rate through base currency (if the **Division Reverse Rate** parameter is set to **Yes**)
5. Global direct exchange rate
6. Global direct reverse exchange rate (if the **Global Reverse Rate** parameter is set to **Yes**)
7. Global exchange rate through base currency
8. Global reverse exchange rate through base currency (if the **Global Reverse Rate** parameter is set to **Yes**)

You need to attach an algorithm of the **C1_EXCRTAD** algorithm type on the **Currency Conversion For Adjustments** algorithm spot of the division for which you want to enable the currency conversion feature. Once the algorithm is attached, the currency conversion will take place during:

- Adjustment Creation
- FT GL Creation for Adjustments

The **C1_EXCRTAD** algorithm type contains the following parameters:

Parameter	**Description**	**Mandatory (Yes or No)**
Override Base Currency	Used to specify the base currency. This will override division's base currency while searching for an exchange rate through base currency.	No
Conversion Type	Used when you want to use the exchanges rates with a particular conversion type during currency conversion. **Note:** The parameter value must be already defined as a value in the **CONV_TYPE_FLG** lookup field.	No
Search Order (Valid Values: Division First, Direct Rate First)	Used to indicate the order in which you want to search for an exchange rate during currency conversion. The valid values are: • Direct Rate First • Division First	No

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Parameter	Description	Mandatory (Yes or No)
	If you do not specify the value for this parameter, by default, the system uses the **Division First** search order.	
Division Reverse Rate (Valid Values: Yes, No)	Used to indicate whether you want the system to search for division-specific reverse exchange rate (i.e. To CCY to From CCY). The valid values are: • Yes • No If you do not specify the value for this parameter, by default, the system does not use the division-specific reverse exchange rate.	No
Global Reverse Rate (Valid Values: Yes, No)	Used to indicate whether you want the system to search for global reverse exchange rate (i.e. To CCY to From CCY). The valid values are: • Yes • No If you do not specify the value for this parameter, by default, the system does not use the global reverse exchange rate.	No
Exchange Rate Override Algorithm	Used to attach a custom algorithm when you want to use an exchange rate search mechanism other than the one defined in this algorithm.	No
Exchange Rate Source	Used when you want to use the exchanges rates received from a particular source during currency conversion. **Note:** The parameter value must be already defined as a value in the **EXCH_RATE_SRC_FLG** lookup field.	No

Related Topics

For more information on...	See...
Adjustment Creation	Adjustment Creation
FT GL Creation	FT GL Creation
How to setup the currency conversion feature	Prerequisites

Additional Algorithms Used in Offset Request

Besides using the algorithms attached to the lifecycle, the system uses the following algorithms for the **Offset Request** feature:

- C1-OFST-AMT on page 1599
- C1-WTBS-CRBL on page 1591

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C1-OFST-AMT

This algorithm calculates the default offset amount whenever a bill is added to the offset request. The default offset amount is equal to the sum of outstanding amount of the debit or credit bills whichever is less. For example, if the following bills are added to the offset request:

- Bill 1 (-100$) where due date is set to 01-01-2018
- Bill 2 (-100$) where due date is set to 01-01-2019
- Bill 3 (25$) where due date is set to 01-01-2018
- Bill 4 (25$) where due date is set to 06-01-2018

In such case, the system sets the default offset amount of Bill 1 to 50$.

Note: This algorithm does not calculate the default offset amount until both the debit and credit bills are added to the offset request.

C1-WTBS-CRBL

THIS ALGORITHM IS ONLY USED IF YOU PRACTICE OPEN-ITEM ACCOUNTING AND THE ACCOUNT'S CUSTOMER CLASS INDICATES OPEN-ITEM ACCOUNTING IS PRACTICED.

This algorithm is used to offset the bill segments of a credit bill. It considers the bill segments of a credit bill for offsetting based on the following parameter:

- **Bill Segment Date Type** - Used to indicate whether the system should consider the bill segments of a credit bill based on the freeze date or coverage start date. The valid values are:
  - **F** - Used when you want to consider the bill segments of a credit bill based on the order of the freeze date.
  - **C** - Used when you want to consider the bill segments of a credit bill based on the order of the coverage start date. Note that you can use this option when the coverage start date is stamped corresponding to the financial transactions in the **C1_FT_EXT** table.

It creates a unique match event for each bill segment and adjustment financial transaction.

Offset Request Type

Oracle Revenue Management and Billing allows you to define an offset request type using which you can create an offset request. It is the offset request type which helps the system to determine the following:

- The business object using which the offset request should be created in the system.
- Whether automatic offset is required for the debit and credit bill line items of an account.

  Note: This process for accounts is only tested and certified for the different lines of business in the health insurance domain.
- Whether automatic offset request is required to settle the unpaid bill amount of a person or an account using the advance deposit available at the parent customer or policy level through a delinquency process.

  Note: This process for accounts is only tested and certified for the different lines of business in the health insurance domain.
- The default adjustment type using which the transfer or offset adjustments should be created in the system.
- The algorithm which helps to calculate default offset amount when a bill is added to the offset request.
- Whether approval is required while offsetting bills through an offset request.
- Whether an offset request must be processed in the deferred mode or in real time (i.e. immediately).
- The maximum search period (in days) that you want to allow while searching bills in an offset request.

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- Whether transfer or offset adjustments should be created while offsetting bills through an offset request.
- Whether a debit bill with credit line item as a credit bill should be created in an offset request.

The **Offset Request Type** screen allows you to define, view, edit, copy, and delete an offset request type. It contains the following zones:

- Offset Request Type List on page 1600
- Offset Request Type on page 1600

Offset Request Type List

The **Offset Request Type List** zone lists the offset request types that are already defined in the system. It contains the following columns:

Column Name	Column Description
Offset Request Type	Displays the offset request type.
Description	Displays the description of the offset request type.
Edit	On clicking the **Edit** (✎) icon, the **Offset Request Type** screen appears where you can edit the details of the offset request type.
Duplicate	On clicking the **Duplicate** (⧉) icon, the **Offset Request Type** screen appears where you can define a new offset request type using an existing offset request type.
Delete	On clicking the **Delete** (🗑) icon, you can delete the offset request type.
	Note: You can delete an offset request type only when an offset request is not yet created using the offset request type.

On clicking the **Broadcast** (📡) icon corresponding to an offset request type, the **Offset Request Type** zone appears with the details of the respective offset request type.

Related Topics

For more information on...	See...
How to edit an offset request type	Editing an Offset Request Type on page 1609
How to copy an offset request type	Copying an Offset Request Type on page 1615
How to delete an offset request type	Deleting an Offset Request Type on page 1614
How to view the details of an offset request type	Viewing the Offset Request Type Details on page 1620
Offset Request Type screen	Offset Request Type on page 1599
Offset Request Type zone	Offset Request Type on page 1600

Offset Request Type

The **Offset Request Type** zone displays the details of the offset request type. It contains the following sections:

- **Main** - Displays basic information about the offset request type. It contains the following fields:

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Field Name	Field Description
Offset Request Type	Displays the offset request type.
Description	Displays the description of the offset request type.
Offset Request Business Object	Indicates the business object using which the offset request is created in the system. In addition, a context menu (⊙) icon appears corresponding to this field which helps in navigating to other screens in the application. **Note:** It has a link. On clicking the link, the **Business Object** screen appears where you can view the details of the respective business object.
Detailed Description	Displays additional information about the offset request type.
Status	Indicates the status of the offset request type. The valid values are: • Active • Inactive
Offset Category	Indicates the category to which the offset request type belongs. The valid values are: • Advance Deposit **Note:** This option for accounts is only tested and certified for the different lines of business in the health insurance domain. • Auto Maintenance **Note:** This option for accounts is only tested and certified for the different lines of business in the health insurance domain. • Regular
Adjustment Type	Indicates the adjustment type using which the transfer or offset adjustments should be created. **Note:** It has a link. On clicking the link, the **Adjustment Type** screen appears where you can view the details of the respective adjustment type.
Default Offset Amount Algorithm	Indicates the algorithm using which the default offset amount should be calculated while adding a bill in an offset request. **Note:** It has a link. On clicking the link, the **Algorithm** screen appears where you can view the details of the respective algorithm.
Defer Processing FT Count	Displays the count which helps to determine whether an offset request must be processed in the deferred mode (i.e. in the background) or in the online mode (i.e. immediately).
Approval Required	Indicates whether approval is required while offsetting bills (created using the offset request type) for an entity.
Approval To Do Type	Indicates that the To Do entry of the specified To Do type must be created when an offset request is submitted for approval.

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Field Name	Field Description
	Note: This field appears when the **Approval Required** option is selected. It has a link. On clicking the link, the **To Do Type** screen appears where you can view the details of the respective To Do Type.
Approval To Do Role	Indicates that users with the specified To Do role can only approve an offset request which is submitted for approval.
	Note: This field appears when the **Approval Required** option is selected. It has a link. On clicking the link, the **To Do Role** screen appears where you can view the details of the respective To Do Role.
Submitter To Do Type	Indicates that the To Do entry of the specified To Do type must be created when the approver requests the submitter to resubmit an offset request for approval.
	Note: It has a link. On clicking the link, the **To Do Type** screen appears where you can view the details of the respective To Do type.
Submitter To Do Role	Indicates that users with the specified To Do role can only receive the To Do that is created when the approver requests the submitter to resubmit an offset request for approval.
	Note: It has a link. On clicking the link, the **To Do Role** screen appears where you can view the details of the respective To Do role.
Bill Search Period	Displays the maximum search period (in days) which is allowed while searching bills in an offset request.
Transfer Adjustment	Indicates whether transfer adjustments should be created while offsetting bills through an offset request.
Bill Line Items Level Offset	Indicates the following: • Whether a debit bill with a credit line item as a credit bill should be considered while offsetting through an offset request • Whether a bill with zero balance having debit and credit line items should be created in an offset request

- **Characteristics** - Lists the characteristics defined for the offset request type. It contains the following columns:

Column Name	Column Description
Characteristic Type	Indicates the characteristic type.
Characteristic Value	Displays the value of the characteristic type.

- **Record Actions** - This section contains the following buttons:

Button Name	Button Description
Edit	Used to edit the details of the offset request type.

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Button Name	Button Description
Delete	Used to delete the offset request type. **Note:** You can delete an offset request type only when an offset request is not yet created using the offset request type.
Duplicate	Used to create a new offset request type using an existing offset request type.

- **Record Information** - This section contains the following field:

Field Name	Field Description
Business Object	Indicates the business object using which the offset request type is created. In addition, a context menu (⊙) icon appears corresponding to this field which helps in navigating to other screens in the application. **Note:** It has a link. On clicking the link, the **Business Object** screen appears where you can view the details of the respective business object.

By default, the **Offset Request Type** zone does not appear in the **Offset Request Type** screen. It appears when you click the **Broadcast** (📡) icon corresponding to an offset request type in the **Offset Request Type List** zone.

Related Topics

For more information on...	See...
How to edit an offset request type	Editing an Offset Request Type on page 1609
How to copy an offset request type	Copying an Offset Request Type on page 1615
How to delete an offset request type	Deleting an Offset Request Type on page 1614
How to view the details of an offset request type	Viewing the Offset Request Type Details on page 1620

Defining an Offset Request Type

Prerequisites

To define an offset request type, you should have:

- Offset request type business objects defined in the application
- Offset request business objects defined in the application
- Adjustment types defined in the application (where the **A/P Request Type Code** field is not set to **REFUND**)
- Default offset amount algorithm defined using the **C1-OFST-AMT** algorithm type
- Required To Do role assigned to the **C1-OFSRQ** and **C1-OFSSB** To Do types in the application
- Required match type entity specified in the **Match Type Entity (Valid Values: BILL, BSEG, SA)** parameter of the **C1-OFST-DIST** algorithm

Procedure

To define an offset request type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **O** and then click **Offset Request Type**.
   A sub-menu appears.
3. Click the **Add** option from the **Offset Request Type** sub-menu.

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The **Offset Request Type** screen appears. It contains the following sections:

- **Main** - Used to specify basic details about the offset request type.
- **Characteristics** - Used to define a list of characteristics for the offset request type.

The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Offset Request Type	Used to specify the offset request type.	Yes
Business Object	Indicates the business object using which you are defining the offset request type.	Not applicable
Description	Used to specify the description for the offset request type.	Yes
Offset Request Business Object	Used to indicate the business object using which you want to create the respective offset request.	Yes
Detailed Description	Used to specify additional information about the offset request type.	No
Status	Used to indicate the status of the offset request type. The valid values are: • Active • Inactive **Note:** You cannot change the status of an offset request type to **Inactive** when the corresponding offset request is in a status other than **Processed**, **Rejected**, or **Unapplied Offset**.	Yes
Offset Category	Used to indicate the category of the offset request type. The valid values are: • **Advance Deposit** - The advance deposit offset requests are automatic offset requests. You can create an advance deposit offset request using an offset request type where the offset category is set to **Advance Deposit**. **Note:** This option for accounts is only tested and certified for the different lines of business in the health insurance domain. • **Auto Maintenance** - The auto maintenance offset requests are automatic offset requests. You can create an auto maintenance offset request using an offset request type where the offset category is set to **Auto Maintenance**. **Note:** This option for accounts is only tested and certified for the different lines of business in the health insurance domain. • **Regular** - The regular or traditional offset requests are manual offset requests. You can create a manual offset request using an offset request type where the offset category is set to **Regular**. **Note:** By default, the **Regular** option is selected.	Yes
Adjustment Type	Used to indicate the adjustment type using which transfer or offset adjustments should be created. By default, the specified	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	adjustment type appears when you create an offset request. You can then change the adjustment type, if required, while editing an offset request. **Note:** The **Search** (🔍) icon appears corresponding to the **Adjustment Type** field. On clicking the **Search** icon, the **Adjustment Type Search** window appears. On specifying the adjustment type, the description of the adjustment type appears corresponding to the **Adjustment Type** field. You can only specify an adjustment type where the **A/P Request Type Code** field is not set to **REFUND**.	
Default Offset Amount Algorithm	Used to attach an algorithm using which you want to calculate default offset amount while adding a bill in an offset request. **Note:** The **Search** (🔍) icon appears corresponding to the **Default Offset Amount Algorithm** field. On clicking the **Search** icon, the **Algorithm Search** window appears. On specifying the algorithm, the description of the algorithm appears corresponding to the **Default Offset Amount Algorithm** field. You must specify an algorithm which is created using the **C1-OFST-AMT** algorithm type in the **Default Offset Amount Algorithm** field.	Yes
Defer Processing FT Count	Used to indicate whether an offset request must be processed in the deferred mode or in real time (i.e. immediately). If the number of financial transactions created for the bills which are selected in the offset request exceeds the defer processing count, the system will process the offset request in the deferred mode. However, if the number of financial transactions created for the bills which are selected in the offset request does not exceed the defer processing count, the system will process the offset request in real time (i.e. immediately).	No

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Field Name	Field Description	Mandatory (Yes or No)
	Note: You cannot specify a negative value in this field. Deferred mode means in the background when the **Offset Request Periodic Monitor (C1-OFSRQ)** batch is invoked. You can configure the **Offset Request Periodic Monitor (C1-OFSRQ)** batch such that it is executed at regular intervals. For more information about the **Offset Request Periodic Monitor (C1-OFSRQ)** batch, refer to *Oracle Revenue Management and Billing Batch Guide*. If you set the defer processing count to zero (0), the system resets the default value to 50.	
Approval Required	Used to indicate whether approval is required while offsetting bills through an offset request.	No
Approval To Do Type	Used to indicate that the To Do entry of the specified To Do type must be created when an offset request is submitted for approval. **Note:** This field appears when the **Approval Required** option is selected. The **Search** (🔍) icon appears corresponding to the **Approval To Do Type** field. On clicking the **Search** icon, the **To Do Type Search** window appears. On specifying the To Do type, the description of the To Do type appears corresponding to the **Approval To Do Type** field. The **C1-OFSRQ** To Do type is shipped with the product. You can use the **C1-OFSRQ** To Do type or a custom To Do type, if required.	Yes (Conditional) **Note:** This field is required when the **Approval Required** option is selected.
Approval To Do Role	Used to indicate that users with the specified To Do role can only approve an offset request which is submitted for approval. **Note:** This field appears when the **Approval Required** option is selected. The list includes only those To Do roles which are associated with the approval To Do type.	Yes (Conditional) **Note:** This field is required when the **Approval Required** option is selected.
Submitter To Do Type	Used to indicate that the To Do entry of the specified To Do type must be created when the approver requests the submitter to resubmit an offset request for approval.	Yes (Conditional)

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The **Search** (🔍) icon appears corresponding to the **Submitter To Do Type** field. On clicking the **Search** icon, the **To Do Type Search** window appears. On specifying the To Do type, the description of the To Do type appears corresponding to the **Submitter To Do Type** field. The **C1-OFSSB** To Do type is shipped with the product. You can use the **C1-OFSSB** To Do type or a custom To Do type, if required.	**Note:** This field is required when the **Approval Required** option is selected.
Submitter To Do Role	Used to indicate that users with the specified To Do role can only receive the To Do that is created when the approver requests the submitter to resubmit an offset request for approval. **Note:** The list includes only those To Do roles which are associated with the submitter To Do type.	Yes (Conditional) **Note:** This field is required when the **Approval Required** option is selected.
Bill Search Period	Used to specify the maximum search period (in days) that you want to allow while searching bills in an offset request. **Note:** If you do not specify any value, by default, it is set to **30**. If you specify a date range that exceeds the maximum search period, the system will not you to search and add bills in the offset request.	No
Transfer Adjustment	Used to indicate whether transfer adjustments should be created while offsetting bills through an offset request. **Note:** By default, the **Transfer Adjustment** option is selected. This impacts the system performance when the match type entity is set to **BSEG** and volume of bill segments in the selected bills is high. Alternatively, the system enables you to create offset adjustments while offsetting bills through an offset request whenever the volume of bill segments in the selected bills is high. To create the offset adjustments while offsetting bills through an offset request, you need to ensure that the **Transfer Adjustment** option is not selected in the respective offset request type.	No
Bill Line Items Level Offset	Used to indicate the following: • Whether a debit bill with a credit line item as a credit bill should be considered while offsetting through an offset request • Whether a bill with zero balance having debit and credit line items should be created in an offset request	No

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Field Name	Field Description	Mandatory (Yes or No)
	Note: If you select the **Bill Line Items Level Offset** option, you need to ensure that **Match Type Entity (Valid Values: BILL, BSEG, SA)** parameter in the **C1-OFST-DIST** algorithm (which is attached to the **Creating Adjustment** status in the lifecycle of the **C1-OffsetRequest** business object) is set to **BSEG**.	

Tip: Alternatively, you can access the **Offset Request Type** screen by clicking the **Add** button in the **Page Title** area of the **Offset Request Type** screen.

4. Enter the required details in the **Main** section.
5. Define characteristics for the offset request type, if required.
6. Click **Save**.
   The offset request type is defined.

Related Topics

For more information on...	See...
Offset Request Type screen	Offset Request Type on page 1599
How to define a characteristic for an offset request type	Defining a Characteristic for an Offset Request Type on page 1608
C1-OFST-AMT algorithm	C1-OFST-AMT on page 1599

Defining a Characteristic for an Offset Request Type

Prerequisites

To define a characteristic for an offset request type, you should have:

- Characteristic types defined in the application (where the characteristic entity is set to **Offset Request Type**).

Procedure

To define a characteristic for an offset request type:

1. Ensure that the **Characteristics** section is expanded when you *a*re defining, editing, or copying an offset request type.

   The **Characteristics** section contains the following fields in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Characteristic Type	Used to indicate the characteristic type.	Yes (Conditional)
	Note: The list includes only those characteristic types where the characteristic entity is set to **Offset Request Type**.	**Note:** This field is required when you are defining a characteristic for the offset request type.
Characteristic Value	Used to specify the value for the characteristic type.	Yes (Conditional)

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Field Name	Field Description	Mandatory (Yes or No)
	Note: If you select a predefined characteristic type, the **Search** (🔍) icon appears corresponding to the **Characteristic Value** field. On clicking the **Search** icon, the **Predefined Characteristic Search** window appears. On specifying the value for a predefined characteristic type, the description of the characteristic value appears corresponding to the **Characteristic Value** field.	**Note:** This field is required when you are defining a characteristic for the offset request type.

2. Enter the required details in the **Characteristics** section.
3. If you want to define more than one characteristic for the offset request type, click the **Add** (+) icon and then *r*epeat step *2*.

Note: However, if you want to remove a characteristic from the offset request type, click the **Delete** (🗑) icon corresponding to the characteristic.

Related Topics

For more information on...	See...
How to define an offset request type	Defining an Offset Request Type on page 1603
How to edit an offset request type	Editing an Offset Request Type on page 1609
How to copy an offset request type	Copying an Offset Request Type on page 1615

Editing an Offset Request Type

Prerequisites

To edit an offset request type, you should have:

- Offset request business objects defined in the application
- Adjustment types defined in the application (where the **A/P Request Type Code** field is not set to **REFUND**)
- Default offset amount algorithm defined using the **C1-OFST-AMT** algorithm type
- Required To Do role assigned to the **C1-OFSRQ** and **C1-OFSSB** To Do types in the application
- Required match type entity specified in the **Match Type Entity (Valid Values: BILL, BSEG, SA)** parameter of the **C1-OFST-DIST** algorithm

Procedure

To edit an offset request type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **O** and then click **Offset Request Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Offset Request Type** sub-menu.
   The **Offset Request Type** screen appears.
4. In the **Offset Request Type List** zone, click the **Edit** (✎) icon in the **Edit** column corresponding to the offset request type whose details you want to edit.

   The **Offset Request Type** screen appears. It contains the following sections:

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- **Main** - Used to specify basic details about the offset request type.
- **Characteristics** - Used to define the characteristics for the offset request type.

The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Offset Request Type	Displays the offset request type.	Not applicable
Business Object	Indicates the business object using which you are defining the offset request type.	Not applicable
Description	Used to specify the description for the offset request type.	Yes
Offset Request Business Object	Used to indicate the business object using which you want to create the respective offset request.	Yes
Detailed Description	Used to specify additional information about the offset request type.	No
Status	Used to indicate the status of the offset request type. The valid values are: • Active • Inactive **Note:** You cannot change the status of an offset request type to **Inactive** when the corresponding offset request is in a status other than **Processed**, **Rejected**, or **Unapplied Offset**.	Yes
Offset Category	Used to indicate the category of the offset request type. The valid values are: • **Advance Deposit** - The advance deposit offset requests are automatic offset requests. You can create an advance deposit offset request using an offset request type where the offset category is set to **Advance Deposit**. **Note:** This option for accounts is only tested and certified for the different lines of business in the health insurance domain. • **Auto Maintenance** - The auto maintenance offset requests are automatic offset requests. You can create an auto maintenance offset request using an offset request type where the offset category is set to **Auto Maintenance**. **Note:** This option for accounts is only tested and certified for the different lines of business in the health insurance domain. • **Regular** - The regular or traditional offset requests are manual offset requests. You can create a manual offset request using an offset request type where the offset category is set to **Regular**. **Note:** By default, the **Regular** option is selected.	Yes
Adjustment Type	Used to indicate the adjustment type using which transfer or offset adjustments should be created. By default, the specified adjustment type appears when you create an offset request. You	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	can then change the adjustment type, if required, while editing an offset request. **Note:** The **Search** (🔍) icon appears corresponding to the **Adjustment Type** field. On clicking the **Search** icon, the **Adjustment Type Search** window appears. On specifying the adjustment type, the description of the adjustment type appears corresponding to the **Adjustment Type** field. You can only specify an adjustment type where the **A/P Request Type Code** field is not set to **REFUND**.	
Default Offset Amount Algorithm	Used to attach an algorithm using which you want to calculate default offset amount while adding a bill in an offset request. **Note:** The **Search** (🔍) icon appears corresponding to the **Default Offset Amount Algorithm** field. On clicking the **Search** icon, the **Algorithm Search** window appears. On specifying the algorithm, the description of the algorithm appears corresponding to the **Default Offset Amount Algorithm** field. You must specify an algorithm which is created using the **C1-OFST-AMT** algorithm type in the **Default Offset Amount Algorithm** field.	Yes
Defer Processing FT Count	Used to indicate whether an offset request must be processed in the deferred mode or in real time (i.e. immediately). If the number of financial transactions created for the bills which are selected in the offset request exceeds the defer processing count, the system will process the offset request in the deferred mode. However, if the number of financial transactions created for the bills which are selected in the offset request does not exceed the defer processing count, the system will process the offset request in real time (i.e. immediately).	No

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Field Name	Field Description	Mandatory (Yes or No)
	Note: You cannot specify a negative value in this field. Deferred mode means in the background when the **Offset Request Periodic Monitor (C1-OFSRQ)** batch is invoked. You can configure the **Offset Request Periodic Monitor (C1-OFSRQ)** batch such that it is executed at regular intervals. For more information about the **Offset Request Periodic Monitor (C1-OFSRQ)** batch, refer to *Oracle Revenue Management and Billing Batch Guide*. If you set the defer processing count to zero (0), the system resets the default value to 50.	
Approval Required	Used to indicate whether approval is required while offsetting bills through an offset request.	No
Approval To Do Type	Used to indicate that the To Do entry of the specified To Do type must be created when an offset request is submitted for approval. **Note:** This field appears when the **Approval Required** option is selected. The **Search** (🔍) icon appears corresponding to the **Approval To Do Type** field. On clicking the **Search** icon, the **To Do Type Search** window appears. On specifying the To Do type, the description of the To Do type appears corresponding to the **Approval To Do Type** field. The **C1-OFSRQ** To Do type is shipped with the product. You can use the **C1-OFSRQ** To Do type or a custom To Do type, if required.	Yes (Conditional) **Note:** This field is required when the **Approval Required** option is selected.
Approval To Do Role	Used to indicate that users with the specified To Do role can only approve an offset request which is submitted for approval. **Note:** This field appears when the **Approval Required** option is selected. The list includes only those To Do roles which are associated with the approval To Do type.	Yes (Conditional) **Note:** This field is required when the **Approval Required** option is selected.
Submitter To Do Type	Used to indicate that the To Do entry of the specified To Do type must be created when the approver requests the submitter to resubmit an offset request for approval.	Yes (Conditional)

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The **Search** (🔍) icon appears corresponding to the **Submitter To Do Type** field. On clicking the **Search** icon, the **To Do Type Search** window appears. On specifying the To Do type, the description of the To Do type appears corresponding to the **Submitter To Do Type** field. The **C1-OFSSB** To Do type is shipped with the product. You can use the **C1-OFSSB** To Do type or a custom To Do type, if required.	**Note:** This field is required when the **Approval Required** option is selected.
Submitter To Do Role	Used to indicate that users with the specified To Do role can only receive the To Do that is created when the approver requests the submitter to resubmit an offset request for approval. **Note:** The list includes only those To Do roles which are associated with the submitter To Do type.	Yes (Conditional) **Note:** This field is required when the **Approval Required** option is selected.
Bill Search Period	Used to specify the maximum search period (in days) that you want to allow while searching bills in an offset request. **Note:** If you do not specify any value, by default, it is set to **30**. If you specify a date range that exceeds the maximum search period, the system will not you to search and add bills in the offset request.	No
Transfer Adjustment	Used to indicate whether transfer adjustments should be created while offsetting bills through an offset request. **Note:** By default, the **Transfer Adjustment** option is selected. This impacts the system performance when the match type entity is set to **BSEG** and volume of bill segments in the selected bills is high. Alternatively, the system enables you to create offset adjustments while offsetting bills through an offset request whenever the volume of bill segments in the selected bills is high. To create the offset adjustments while offsetting bills through an offset request, you need to ensure that the **Transfer Adjustment** option is not selected in the respective offset request type.	No
Bill Line Items Level Offset	Used to indicate the following: • Whether a debit bill with a credit line item as a credit bill should be considered while offsetting through an offset request • Whether a bill with zero balance having debit and credit line items should be created in an offset request	No

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Field Name	Field Description	Mandatory (Yes or No)
	Note: If you select the **Bill Line Items Level Offset** option, you need to ensure that **Match Type Entity (Valid Values: BILL, BSEG, SA)** parameter in the **C1-OFST-DIST** algorithm (which is attached to the **Creating Adjustment** status in the lifecycle of the **C1-OffsetRequest** business object) is set to **BSEG**.	

Tip: Alternatively, you can edit an offset request type by clicking the **Edit** button in the **Offset Request Type** zone.

5. Modify the required details in the **Main** section.
6. Define, edit, or remove characteristics from the offset request type, if required.
7. Click **Save**.
   The changes made to the offset request type are saved.

Related Topics

For more information on...	See...
Offset Request Type screen	Offset Request Type on page 1599
Offset Request Type List zone	Offset Request Type List on page 1600
Offset Request Type zone	Offset Request Type on page 1600
How to define a characteristic for an offset request type	Defining a Characteristic for an Offset Request Type on page 1608
C1-OFST-AMT algorithm	C1-OFST-AMT on page 1599

Deleting an Offset Request Type

Procedure

To delete an offset request type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **O** and then click **Offset Request Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Offset Request Type** sub-menu.
   The **Offset Request Type** screen appears.
4. In the **Offset Request Type List** zone, click the **Delete** (🗑) icon in the **Delete** column corresponding to the *o*ffset request type that you want to delete.

   A message appears confirming whether you want to delete the offset request type.

Note: You can delete an offset request type only when an offset request is not yet created using the offset request type.

Tip: Alternatively, you can delete an offset request type by clicking the **Delete** button in the **Offset Request Type** zone.

5. Click **OK**.
   The offset request type is deleted.

Related Topics

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For more information on...	See...
Offset Request Type screen	Offset Request Type on page 1599
Offset Request Type List zone	Offset Request Type List on page 1600
Offset Request Type zone	Offset Request Type on page 1600

Copying an Offset Request Type

Instead of creating an offset request type from scratch, you can create a new offset request type using an existing offset request type. This is possible through copying an offset request type. On copying an offset request type, the details including the characteristics are copied to the new offset request type. You can then edit the details, if required.

Prerequisites

To copy an offset request type, you should have:

- Offset request type (whose copy you want to create) defined in the application
- Offset request business objects defined in the application
- Adjustment types defined in the application (where the **A/P Request Type Code** field is not set to **REFUND**)
- Default offset amount algorithm defined using the **C1-OFST-AMT** algorithm type
- Required To Do role assigned to the **C1-OFSRQ** and **C1-OFSSB** To Do types in the application
- Required match type entity specified in the **Match Type Entity (Valid Values: BILL, BSEG, SA)** parameter of the **C1-OFST-DIST** algorithm

Procedure

To copy an offset request type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **O** and then click **Offset Request Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Offset Request Type** sub-menu.
   The **Offset Request Type** screen appears.
4. In the **Offset Request Type List** zone, click the **Duplicate** (⧉) icon in the **Duplicate** column *c*orresponding to the offset request type whose copy you want to create.

   The **Offset Request Type** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details about the offset request type.
   - **Characteristics** - Used to define the characteristics for the offset request type.

   The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Offset Request Type	Used to specify the offset request type.	Yes
Business Object	Indicates the business object using which you are defining the offset request type.	Not applicable
Description	Used to specify the description for the offset request type.	Yes
Offset Request Business Object	Used to indicate the business object using which you want to create the respective offset request.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
Detailed Description	Used to specify additional information about the offset request type.	No
Status	Used to indicate the status of the offset request type. The valid values are: • Active • Inactive **Note:** You cannot change the status of an offset request type to **Inactive** when the corresponding offset request is in a status other than **Processed**, **Rejected**, or **Unapplied Offset**.	Yes
Offset Category	Used to indicate the category of the offset request type. The valid values are: • **Advance Deposit** - The advance deposit offset requests are automatic offset requests. You can create an advance deposit offset request using an offset request type where the offset category is set to **Advance Deposit**. **Note:** This option for accounts is only tested and certified for the different lines of business in the health insurance domain. • **Auto Maintenance** - The auto maintenance offset requests are automatic offset requests. You can create an auto maintenance offset request using an offset request type where the offset category is set to **Auto Maintenance**. **Note:** This option for accounts is only tested and certified for the different lines of business in the health insurance domain. • **Regular** - The regular or traditional offset requests are manual offset requests. You can create a manual offset request using an offset request type where the offset category is set to **Regular**. **Note:** By default, the **Regular** option is selected.	Yes
Adjustment Type	Used to indicate the adjustment type using which transfer or offset adjustments should be created. By default, the specified adjustment type appears when you create an offset request. You can then change the adjustment type, if required, while editing an offset request.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The **Search** (🔍) icon appears corresponding to the **Adjustment Type** field. On clicking the **Search** icon, the **Adjustment Type Search** window appears. On specifying the adjustment type, the description of the adjustment type appears corresponding to the **Adjustment Type** field. You can only specify an adjustment type where the **A/P Request Type Code** field is not set to **REFUND**.	
Default Offset Amount Algorithm	Used to attach an algorithm using which you want to calculate default offset amount while adding a bill in an offset request.	Yes
	Note: The **Search** (🔍) icon appears corresponding to the **Default Offset Amount Algorithm** field. On clicking the **Search** icon, the **Algorithm Search** window appears. On specifying the algorithm, the description of the algorithm appears corresponding to the **Default Offset Amount Algorithm** field. You must specify an algorithm which is created using the **C1-OFST-AMT** algorithm type in the **Default Offset Amount Algorithm** field.	
Defer Processing FT Count	Used to indicate whether an offset request must be processed in the deferred mode or in real time (i.e. immediately). If the number of financial transactions created for the bills which are selected in the offset request exceeds the defer processing count, the system will process the offset request in the deferred mode. However, if the number of financial transactions created for the bills which are selected in the offset request does not exceed the defer processing count, the system will process the offset request in real time (i.e. immediately).	No
	Note: You cannot specify a negative value in this field. Deferred mode means in the background when the **Offset Request Periodic Monitor (C1-OFSRQ)** batch is invoked. You can configure the **Offset Request Periodic Monitor (C1-OFSRQ)** batch such that it is executed at regular intervals. For more information about the **Offset Request Periodic Monitor (C1-OFSRQ)** batch, refer to *Oracle Revenue Management and Billing Batch Guide*. If you set the defer processing count to zero (0), the system resets the default value to 50.	

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Field Name	Field Description	Mandatory (Yes or No)
Approval Required	Used to indicate whether approval is required while offsetting bills through an offset request.	No
Approval To Do Type	Used to indicate that the To Do entry of the specified To Do type must be created when an offset request is submitted for approval. **Note:** This field appears when the **Approval Required** option is selected. The **Search** (🔍) icon appears corresponding to the **Approval To Do Type** field. On clicking the **Search** icon, the **To Do Type Search** window appears. On specifying the To Do type, the description of the To Do type appears corresponding to the **Approval To Do Type** field. The **C1-OFSRQ** To Do type is shipped with the product. You can use the **C1-OFSRQ** To Do type or a custom To Do type, if required.	Yes (Conditional) **Note:** This field is required when the **Approval Required** option is selected.
Approval To Do Role	Used to indicate that users with the specified To Do role can only approve an offset request which is submitted for approval. **Note:** This field appears when the **Approval Required** option is selected. The list includes only those To Do roles which are associated with the approval To Do type.	Yes (Conditional) **Note:** This field is required when the **Approval Required** option is selected.
Submitter To Do Type	Used to indicate that the To Do entry of the specified To Do type must be created when the approver requests the submitter to resubmit an offset request for approval. **Note:** The **Search** (🔍) icon appears corresponding to the **Submitter To Do Type** field. On clicking the **Search** icon, the **To Do Type Search** window appears. On specifying the To Do type, the description of the To Do type appears corresponding to the **Submitter To Do Type** field. The **C1-OFSSB** To Do type is shipped with the product. You can use the **C1-OFSSB** To Do type or a custom To Do type, if required.	Yes (Conditional) **Note:** This field is required when the **Approval Required** option is selected.
Submitter To Do Role	Used to indicate that users with the specified To Do role can only receive the To Do that is created when the approver requests the submitter to resubmit an offset request for approval. **Note:** The list includes only those To Do roles which are associated with the submitter To Do type.	Yes (Conditional) **Note:** This field is required when the **Approval Required** option is selected.

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Field Name	Field Description	Mandatory (Yes or No)
Bill Search Period	Used to specify the maximum search period (in days) that you want to allow while searching bills in an offset request. **Note:** If you do not specify any value, by default, it is set to **30**. If you specify a date range that exceeds the maximum search period, the system will not you to search and add bills in the offset request.	No
Transfer Adjustment	Used to indicate whether transfer adjustments should be created while offsetting bills through an offset request. **Note:** By default, the **Transfer Adjustment** option is selected. This impacts the system performance when the match type entity is set to **BSEG** and volume of bill segments in the selected bills is high. Alternatively, the system enables you to create offset adjustments while offsetting bills through an offset request whenever the volume of bill segments in the selected bills is high. To create the offset adjustments while offsetting bills through an offset request, you need to ensure that the **Transfer Adjustment** option is not selected in the respective offset request type.	No
Bill Line Items Level Offset	Used to indicate the following: • Whether a debit bill with a credit line item as a credit bill should be considered while offsetting through an offset request • Whether a bill with zero balance having debit and credit line items should be created in an offset request **Note:** If you select the **Bill Line Items Level Offset** option, you need to ensure that **Match Type Entity (Valid Values: BILL, BSEG, SA)** parameter in the **C1-OFST-DIST** algorithm (which is attached to the **Creating Adjustment** status in the lifecycle of the **C1-OffsetRequest** business object) is set to **BSEG**.	No

Tip: Alternatively, you can copy an offset request type by clicking the **Duplicate** button in the **Offset Request Type** zone.

5. Enter the required details in the **Main** section.
6. Define, edit, or remove characteristics from the offset request type, if required.
7. Click **Save**.
   The new offset request type is defined.

Related Topics

For more information on...	See...
Offset Request Type screen	Offset Request Type on page 1599

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For more information on...	See...
Offset Request Type List zone	Offset Request Type List on page 1600
Offset Request Type zone	Offset Request Type on page 1600
How to define a characteristic for an offset request type	Defining a Characteristic for an Offset Request Type on page 1608
C1-OFST-AMT algorithm	C1-OFST-AMT on page 1599

Viewing the Offset Request Type Details

Procedure

To view the details of an offset request type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **O** and then click **Offset Request Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Offset Request Type** sub-menu.
   The **Offset Request Type** screen appears.
4. In the **Offset Request Type List** zone, click the **Broadcast** (📡) icon corresponding to the offset request type *w*hose details you want to view.
   The **Offset Request Type** zone appears.
5. View the details of the offset request type in the **Offset Request Type** zone.

Related Topics

For more information on...	See...
Offset Request Type screen	Offset Request Type on page 1599
Offset Request Type List zone	Offset Request Type List on page 1600
Offset Request Type zone	Offset Request Type on page 1600

Offset Request (Used for Searching)

The **Offset Request** screen allows you to search for an offset request using various search criteria. It also allows you to define an offset request. It contains the following zone:

- Search Offset Request on page 1620

Through this screen, you can navigate to the following screen:

- Offset Request (Used for Viewing) on page 1627

Search Offset Request

The **Search Offset Request** zone allows you to search for an offset request using various search criteria. It contains the following two sections:

- **Search Criteria** - The **Search Criteria** section contains the following fields:

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Field Name	Field Description	Mandatory (Yes or No)
Search By	Used to indicate whether you want to search for an offset request using the offset request details or the bill details. The valid values are: • Request Details • Bill Details **Note:** By default, the **Request Details** option is selected.	Yes
Offset Request ID	Used to search a particular offset request. **Note:** This field appears when the **Request Details** option is selected from the **Search By** list.	No
Creation From Date	Used to search offset requests which are created from a particular date onwards. **Note:** This field appears when the **Request Details** option is selected from the **Search By** list.	No
User ID	Used to search offset requests which are created by a particular user. **Note:** This field appears when the **Request Details** option is selected from the **Search By** list.	No
Created To	Used to search offset requests which are created till a particular date. **Note:** This field appears when the **Request Details** option is selected from the **Search By** list.	No
Status	Used to search offset requests which are in a particular status. The valid values are: • Approval In Progress • Defer Unapplied • Deferred Processing • Draft • Processed • Rejected • Unapplied Offset **Note:** This field appears when the **Request Details** option is selected from the **Search By** list.	No
Person ID	Used to search offset requests which include bills of a particular person.	No

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Field Name	Field Description	Mandatory (Yes or No)
	Note: This field appears when the **Request Details** option is selected from the **Search By** list. The **Search** (🔍) icon appears corresponding to the **Person ID** field. On clicking the **Search** icon, the **Person Search** window appears where you can search for a particular person.	
Offset Request Type	Used to search offset requests which are created using a particular offset request type. **Note:** The list includes only those values which are present in the **C1_OFFSET_REQ-TYPE** table. This field appears when the **Request Details** option is selected from the **Search By** list.	No
Account ID	Used to search offset requests which include bills of a particular account. **Note:** This field appears when the **Request Details** option is selected from the **Search By** list. The **Search** (🔍) icon appears corresponding to the **Account ID** field. On clicking the **Search** icon, the **Account Search** window appears where you can search for a particular account.	No
Bill ID	Used to search offset requests which include a particular bill. **Note:** This field appears when the **Bill Details** option is selected from the **Search By** list. The **Search** (🔍) icon appears corresponding to the **Bill ID** field. On clicking the **Search** icon, the **Bill Search** window appears where you can search for a particular bill.	No
Bill Date From	Used to search offset requests which include bills created from a particular date onwards. **Note:** This field appears when the **Bill Details** option is selected from the **Search By** list.	No
Alternate Bill ID	Used to search offset requests which include a particular bill. **Note:** This field appears when the **Bill Details** option is selected from the **Search By** list.	No

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Field Name	Field Description	Mandatory (Yes or No)
Bill Date To	Used to search offset requests which include bills created till a particular date. **Note:** This field appears when the **Bill Details** option is selected from the **Search By** list.	No

Note: You must specify at least one search criterion while searching for an offset request.

- **Search Results** - On clicking the **Search** button, the search results appear based on the specified search criteria. The **Search Results** section contains the following columns:

Column Name	Column Description
Creation Date Time	Displays the date and time when the offset request is created.
Offset Request Information	Displays information about the offset request. **Note:** It has a link. On clicking the link, the **Offset Request** screen appears where you can view the details of the respective offset request.
Offset Amount	Displays the total amount which is offset through the offset request.
Status	Indicates the status of the offset request. The valid values are: • Approval In Progress • Defer Unapplied • Deferred Processing • Draft • Processed • Rejected • Unapplied Offset
Created By	Indicates the user who has created the offset request.
Creation Mode	Indicates whether the offset request is created manually or automatically. The valid values are: • Automatic • Manual
Primary Bill	Indicates the bill for which the offset request is created. In addition, a context menu (⌄) icon appears corresponding to this column which helps in navigating to other screens in the application. **Note:** It has a link. On clicking the link, the **Bill** screen appears where you can view the details of the respective bill.

Note: Pagination is used to display limited number of records in the **Search Results** section. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

Related Topics

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For more information on...	See...
How to search for an offset request	Searching for an Offset Request on page 1624
How to view the details of an offset request	Viewing the Offset Request Details on page 1626
How to create an offset request	Creating an Offset Request on page 1624

Searching for an Offset Request

Prerequisites

To search for an offset request, you should have:

- Offset request types defined in the application

Procedure

To search for an offset request:

1. Click the **Menu** link in the **Application** toolbar.
   A list appears.
2. From the **Main** menu, select **Accounting and Receivable** and then click **Offset Request**.
   A sub-menu appears.
3. Click the **Search** option from the **Offset Request** sub-menu.
   The **Offset Request** screen appears.
4. Enter the search criteria in the **Search Offset Request** zone.

   Note: ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.
5. Click **Search**.
   A list of offset requests that meet the search criteria appears in the **Search Results** section.

Related Topics

For more information on...	See...
Offset Request screen	Offset Request (Used for Searching) on page 1620
Search Offset Request zone	Search Offset Request on page 1620

Creating an Offset Request

Prerequisites

To create an offset request, you should have:

- Offset request types defined in the application
- Bills created in the application

Procedure

To create an offset request:

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1. Do either of the following:

If you want to...	Then...
Create a single offset request from the Account Receivable Central screen	**a.** Click the **Menu** link in the **Application** toolbar. A list appears. **b.** From the **Main** menu, select **Accounting and Receivable** and then click **Account Receivable Central**. The **Account Receivable Central** screen appears. **c.** Search for the required bill in the **Search Bill** zone. **d.** In the **Search Results** section, select the check box corresponding to the bill which you want to offset through a single offset request. **e.** Click **Single Offset**.
Create a mass offset request from the Account Receivable Central screen	**a.** Click the **Menu** link in the **Application** toolbar. A list appears. **b.** From the **Main** menu, select **Accounting and Receivable** and then click **Account Receivable Central**. The **Account Receivable Central** screen appears. **c.** Search for the required bill in the **Search Bill** zone. **d.** In the **Search Results** section, select the check box corresponding to the bill which you want to offset through a mass offset request. **e.** Click **Mass Offset**.
Create a cross currency offset request from the Account Receivable Central screen	**a.** Click the **Menu** link in the **Application** toolbar. A list appears. **b.** From the **Main** menu, select **Accounting and Receivable** and then click **Account Receivable Central**. The **Account Receivable Central** screen appears. **c.** Search for the required bill in the **Search Bill** zone. **d.** In the **Search Results** section, select the check box corresponding to the bill which you want to offset through a cross currency offset request. **e.** Click **Cross Currency Offset**.
Create a single, mass, or cross currency offset request from the Offset Request screen	**a.** Click the **Menu** link in the **Application** toolbar. A list appears. **b.** From the **Main** menu, select **Accounting and Receivable** and then click **Offset Request**. A sub-menu appears. **c.** Click the **Add** option from the **Offset Request** sub-menu.

The **Add Offset Request** screen appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Offset Request Type	Used to indicate the offset request type using which you want to create the offset request.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
Bill	Used to indicate the bill which you want to offset through the offset request. **Note:** The **Search** (🔍) icon appears corresponding to the **Bill** field. On clicking the **Search** icon, the **Bill Search** window appears. On specifying the bill, the information about the bill appears corresponding to the **Bill** field. This field is automatically populated by the bill ID for an offset request created from the **Account Receivable Central** screen.	Yes

Tip: Alternatively, you can access this screen by clicking the **Add** button in the **Page Title** area of the **Offset Request** screen.

2. Enter the required details in the **Add Offset Request** screen.
3. Click **OK**.
   The offset request is created in the **Draft** status. The **Offset Request** screen appears where you can view the details of the offset request. By default, the adjustment type specified in the respective offset request type is used while creating the offset request. You can then change the adjustment type, if required.
4. Add debit and/or credit bills in the offset request.
5. Define characteristics for the offset request, if required.

Related Topics

For more information on...	See...
Single Offset Request	Single Offset on page 1573
Mass Offset Request	Mass Offset on page 1574
Cross Currency Offset Request	Cross Currency Offset on page 1576
Offset Request screen	Offset Request (Used for Searching) on page 1620
How to add a debit or credit bill to an offset request	Adding a Debit or Credit Bill to an Offset Request on page 1640
How to define a characteristic for an offset request	Defining a Characteristic for an Offset Request on page 1643

Viewing the Offset Request Details

Procedure

To view the details of an offset request:

1. Search for the offset request in the **Offset Request** screen.
2. In the **Search Results** section, click the link in the **Offset Request Information** column corresponding to the *o*ffset request whose details you want to view.
   The **Offset Request** screen appears.
3. Ensure that the **Main** tab is selected.
4. View the details of the offset request in the **Offset Request** zone.

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Related Topics

For more information on...	See...
How to search for an offset request	Searching for an Offset Request on page 1624
Offset Request screen	Offset Request (Used for Searching) on page 1620
Offset Request screen	Offset Request (Used for Viewing) on page 1627
Offset Request zone	Offset Request on page 1628

Offset Request (Used for Viewing)

The **Offset Request** screen allows you to:

- View the details of the offset request
- Search for a debit or credit bill based on bill, account, or person details
- View the debit and credit bills which are added to the offset request
- View the offset or transfer adjustments which are created through the offset request
- View the financial transactions of an auto maintenance offset request type
- Add a debit or credit bill to the offset request
- Edit the details of the offset request
- Define, edit, or remove the characteristics from the offset request
- Edit the offset amount for each debit and credit bill
- Remove a debit or credit bill from the offset request
- Delete the offset request
- Submit the offset request for approval
- Approve or reject the offset request
- Unapply (i.e. cancel) the offset request
- View the log of the offset request
- Add a log entry for the offset request

It consists of the following tabs:

- Offset Request - Main on page 1627
- Offset Request - Log on page 1638

Offset Request - Main

The **Main** tab displays information about the offset request. It contains the following zones:

- Offset Request on page 1628
- Selected Bills on page 1630

  Note: This zone appears when you are viewing the debit and credit bills added to the offset request.
- Search Bill on page 1631
- Offset Request Adjustments on page 1635

  Note: This zone appears when you are viewing the offset or transfer adjustments created for the bill through the offset request.
- Auto Maintenance Financial Transactions on page 1636

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Note: This zone appears when you are viewing the details of an auto maintenance offset request.

Offset Request

The **Offset Request** zone displays the details of the offset request. It contains the following sections:

- **Main** - Displays basic information about the offset request. It contains the following fields:

Field Name	Field Description
Offset Request Information	Displays information about the offset request.
Offset Request Type	Indicates the offset request type using which the offset request is created. **Note:** It has a link. On clicking the link, the **Offset Request Type** screen appears where you can view the details of the respective offset request type.
Status	Indicates the status of the offset request. The valid values are: • Approval In Progress • Defer Unapplied • Deferred Processing • Draft • Processed • Rejected • Unapplied Offset
Status Reason	Indicates the reason why the offset request is rejected or unapplied (i.e. canceled). **Note:** It has a link. On clicking the link, the **Status Reason** screen appears where you can view the details of the respective status reason. This field appears when the offset request is in the **Rejected**, **Defer Unapplied**, or **Unapplied Offset** status.
Adjustment Type	Indicates the adjustment type using which the offset or transfer adjustments should be created through the offset request. **Note:** It has a link. On clicking the link, the **Adjustment Type** screen appears where you can view the details of the respective adjustment type.
Offset Amount	Displays the total amount which is offset through the offset request.
Account Information	Indicates the account for which the debit or credit bill is created. In addition, this column has a context menu which helps in navigating to other screens in the application. **Note:** It has a link. On clicking the link, the **Account** screen appears where you can view the details of the respective account. This field appears when you are viewing the details of an auto maintenance offset request.

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Field Name	Field Description
Comments	Displays additional details specified while rejecting or unapplying (i.e. canceling) the offset request. **Note:** This field appears when the offset request is in the **Rejected**, **Defer Unapplied**, or **Unapplied Offset** status.

- **Characteristics** - Lists the characteristics defined for the offset request. It contains the following columns:

Column Name	Column Description
Effective Date	Displays the date from when the characteristic is effective for the offset request.
Characteristic Type	Indicates the characteristic type.
Characteristic Value	Displays the value of the characteristic type.

- **Record Actions** - The **Record Actions** section contains the following buttons:

Button Name	Button Description
Edit	Used to edit the details of the offset request. **Note:** The **Edit** button appears when the offset request is in the **Draft** status.
Delete	Used to delete the offset request. **Note:** The **Delete** button appears when the offset request is in the **Draft** status.
Submit	Used to submit the offset request. **Note:** The **Submit** button appears when the offset request is in the **Draft** status.
Approve	Used to approve the offset request. **Note:** The **Approve** button appears when: • The offset request is in the **Approval In Progress** status. • A user with the approval To Do role is reviewing the offset request.
Reject	Used to reject the offset request. **Note:** The **Reject** button appears when: • The offset request is in the **Approval In Progress** status. • A user with the approval To Do role is reviewing the offset request.
Unapply	Used to unapply (i.e. cancel) the offset request. **Note:** The **Unapply** button appears when the offset request is in the **Processed** status.

- **Record Information** - The **Record Information** section contains the following fields:

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Field Name	Field Description
Business Object	Indicates the business object using which the offset request is created. n addition, a context menu (⊙) icon appears corresponding to this field which helps in navigating to other screens in the application. **Note:** It has a link. On clicking the link, the **Business Object** screen appears where you can view the details of the respective business object.
Status Date/Time	Displays the date and time when the offset request status is updated
Create Date/Time	Displays the date and time when the offset request is created.

Related Topics

For more information on...	See...
How to edit an offset request	Editing an Offset Request on page 1641
How to delete an offset request	Deleting an Offset Request on page 1646
How to submit an offset request	Submitting an Offset Request on page 1646
How to approve an offset request	Approving an Offset Request on page 1648
How to reject an offset request	Rejecting an Offset Request on page 1650
How to unapply (i.e. cancel) an offset request	Unapplying an Offset Request on page 1651

Selected Bills

The **Selected Bills** zone lists the debit and credit bills which are added to the offset request. It contains the following columns:

Column Name	Column Description
Bill Information	Indicates the debit or credit bill which is added to the offset request. In addition, a context menu (⊙) icon appears corresponding to this field which helps in navigating to other screens in the application. **Note:** It has a link. On clicking the link, the **Bill** screen appears where you can view the details of the respective bill.
Bill Date	Displays the date when the debit or credit bill is created.
Outstanding Amount	Displays the outstanding amount (i.e. unpaid amount) of the debit or credit bill.
Debit Balance	Displays the sum of unpaid debit line items of a bill.
Credit Balance	Displays the sum of open credit line items of a bill.
Credit Bill	Indicates whether you want to consider a debit bill with a credit line item as a credit bill in the offset request.
Hold Amount	Displays the amount of the debit or credit bill which is kept on hold through a hold request.
Offset Amount	Displays the amount which you want to offset from the debit or credit bill.

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Column Name	Column Description
Remaining Bill Balance	Displays the remaining outstanding amount of the debit or credit bill (i.e. Outstanding Amount - Hold Amount - Offset Amount). **Note:** This column does not appear when the offset request is in the **Processed** or **Unapplied Offset** status.
Updated Hold Amount	Displays the new hold amount (i.e. Current Hold Amount + Remaining Bill Balance) for the debit or credit bill which is derived when the remaining bill balance is less than the current hold amount. **Note:** This column does not appear when the offset request is in the **Processed** or **Unapplied Offset** status.
Account Information	Indicates the account for which the debit or credit bill is created. In addition, a context menu ( ) icon appears corresponding to this field which helps in navigating to other screens in the application. **Note:** It has a link. On clicking the link, the **Account** screen appears where you can view the details of the respective account.
Bill ID	Displays the bill ID.

Note: Pagination is used to display limited number of records in this zone. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

On clicking the **Broadcast** ( ) icon corresponding to a bill, the **Offset Request Adjustments** zone appears where you can view the offset or transfer adjustments created for the bill through the offset request.

Note: The **Broadcast** ( ) icon appears corresponding to a bill when the offset request is in the **Processed** or **Unapplied Offset** status.

You can filter the list using various search criteria (such as, **Bill Balance**, **Bill ID**, and **Account ID**) available in the **Filter** area. By default, the **Filter** area is hidden. You can view the **Filter** area by clicking the **Filters** ( ) icon in the upper right corner of this zone.

You can change the layout of this zone. For more information on how to change the layout, see Changing the Layout on page 4410.

Related Topics

For more information on...	See...
How to view the debit or credit bills added to an offset request	Viewing the Debit and Credit Bills Added to an Offset Request on page 1638

Search Bill

The bills listed in the **Search Bill** zone varies depending on the following scenarios:

If...	Then...
The single offset request is created through the **Account Receivable Central** screen and the **Allow Offsetting Across Persons** option	The **Search Bill** zone lists completed bills of all accounts of the main customer (whose bill is added as the primary bill in the offset request) and completed bills of all accounts of its effective child persons. If the primary bill is a debit bill, it lists credit bills of the main customer and its child persons. However, if the primary

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If...	Then...
type of the **C1-OFFSETREQ** feature configuration is set to **Y**	bill is a credit bill, it lists debit bills of the main customer and its child persons. Note that it lists only those bills which are in the same currency as that of the primary bill. For example, if the primary bill is in USD, then this zone lists all completed bills of the main customer and its child persons which are in USD.
The single offset request is created through the **Account Receivable Central** screen and the **Allow Offsetting Across Persons** option type of the **C1-OFFSETREQ** feature configuration is set to **N**	The **Search Bill** zone lists completed bills of all accounts of the main customer (whose bill is added as the primary bill in the offset request). If the primary bill is a debit bill, it lists credit bills of the main customer. However, if the primary bill is a credit bill, it lists debit bills of the main customer. Note that it lists only those bills which are in the same currency as that of the primary bill. For example, if the primary bill is in USD, then this zone lists all completed bills of the main customer which are in USD.
The mass offset request is created through the **Account Receivable Central** screen and the **Allow Offsetting Across Persons** option type of the **C1-OFFSETREQ** feature configuration is set to **Y**	The **Search Bill** zone lists completed debit and credit bills of all accounts of the main customer (whose bill is added as the primary bill in the offset request) and completed debit and credit bills of all accounts of its effective child persons. Note that it lists only those debit and credit bills which are in the same currency as that of the primary bill. For example, if the primary bill is in USD, then this zone lists all completed debit and credit bills of the main customer and its child persons which are in USD.
The mass offset request is created through the **Account Receivable Central** screen and the **Allow Offsetting Across Persons** option type of the **C1-OFFSETREQ** feature configuration is set to **N**	The **Search Bill** zone lists completed debit and credit bills of all accounts of the main customer (whose bill is added as the primary bill in the offset request). Note that it lists only those debit and credit bills which are in the same currency as that of the primary bill. For example, if the primary bill is in USD, then this zone lists all completed debit and credit bills of the main customer which are in USD.
The cross currency offset request is created through the **Account Receivable Central** screen and the **Allow Offsetting Across Persons** option type of the **C1-OFFSETREQ** feature configuration is set to **Y**	The **Search Bill** zone lists completed debit and credit bills of all accounts of the main customer (whose bill is added as the primary bill in the offset request) and completed debit and credit bills of all accounts of its effective child persons. Note that it lists only those debit and credit bills which are in the currency different from the primary bill. For example, if the primary bill is in USD, then this zone lists all completed debit and credit bills of the main customer and its child persons which are in the currency other than USD.
The cross currency offset request is created through the **Account Receivable Central** screen and the **Allow Offsetting Across Persons** option type of the **C1-OFFSETREQ** feature configuration is set to **N**	The **Search Bill** zone lists completed debit and credit bills of all accounts of the main customer (whose bill is added as the primary bill in the offset request). Note that it lists only those debit and credit bills which are in the currency different from the primary bill. For example, if the primary bill is in USD, then this zone lists all completed debit and credit bills of the main customer which are in the currency other than USD.
The offset request is created through the **Offset Request** screen and the **Allow Offsetting Across Persons** option type of the **C1-OFFSETREQ** feature configuration is set to **Y**	The **Search Bill** zone lists completed debit and credit bills of all accounts of the main customer (whose bill is added as the primary bill in the offset request) and completed debit and credit bills of all accounts of its effective child persons. Note that it lists only those debit and credit bills which are in the same currency as that of the primary bill. For example, if the primary bill is in USD, then this zone lists all completed debit and credit bills of the main customer and its child persons which are in USD. **Note:** This zone lists the debit and credit bills in the currency different from the primary bill when the **Show Cross Currency Bills** option is selected.
The offset request is created through the **Offset Request**	The **Search Bill** zone lists completed debit and credit bills of all accounts of the main customer (whose bill is added as the primary bill in the offset request). Note

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If...	Then...
screen and the **Allow Offsetting Across Persons** option type of the **C1-OFFSETREQ** feature configuration is set to **N**	that it lists only those debit and credit bills which are in the same currency as that of the primary bill. For example, if the primary bill is in USD, then this zone lists all completed debit and credit bills of the main customer which are in USD. **Note:** This zone lists the debit and credit bills in the currency different from the primary bill only when the **Show Cross Currency Bills** option is selected.

It also allows you to filter the bills using various search criteria. It contains the following two sections:

- **Search Criteria** - The **Search Criteria** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Search By	Used to indicate whether you want to search for a completed bill using the person, account, or bill details. The valid values are: • Person Details • Account Details • Bill Details **Note:** By default, the **Person Details** option is selected.	Yes
Person ID	Used to search completed bills of a particular person. **Note:** This field appears when the **Person Details** option is selected from the **Search By** list. The **Search** (🔍) icon appears corresponding to the **Person ID** field. On clicking the **Search** icon, the **Person Search** window appears.	No
Bill Date From	Used to search completed bills which are created from a particular date onwards. **Note:** By default, it is set to a date which is calculated as follows: `Bill Date To -- Bill Search Period ' (Specified in Offset Request Type)`	Yes
Bills on Hold	Used to indicate whether you want to search completed bills which are partially kept on hold. The valid values are: • No • Yes	No
Bill Date To	Used to search completed bills which are created till a particular date. **Note:** By default, it is set to the current date.	Yes

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<table>
<tr><th>Field Name</th><th>Field Description</th><th>Mandatory (Yes or No)</th></tr>
<tr><td>Bill Balance</td><td>Used to indicate whether you want to search completed bills with a particular balance amount. The valid values are:
Equal to Zero
Greater Than Zero
Less Than Zero
Not Equal to Zero
Note:
If a single or cross currency offset request is created through the Account Receivable Central screen, this field is disabled, and by default, it is set to the following:<table><tr><th>If the primary bill is a...</th><th>Then, it is set to...</th></tr><tr><td>Credit Bill</td><td>Greater Than Zero</td></tr><tr><td>Debit Bill</td><td>Less Than Zero</td></tr></table></td><td>No</td></tr>
<tr><td>Show Cross Currency Bills</td><td>Used to indicate whether you want to search completed bills in the currencies different from the primary bill.
Note:
This option is disabled when a single or cross currency offset request is created through the Account Receivable Central screen.
By default, this option is selected when a cross currency offset request is created through the Account Receivable Central screen.</td><td>No</td></tr>
<tr><td>Account ID</td><td>Used to search completed bills which created for a particular account.
Note:
This field appears when the Account Details option is selected from the Search By list.
The Search (🔍) icon appears corresponding to the Account ID field. On clicking the Search icon, the Account Search window appears.</td><td>Yes</td></tr>
<tr><td>Bill ID</td><td>Used to search a particular completed bill.
Note:
This field appears when the Bill Details option is selected from the Search By list.
The Search (🔍) icon appears corresponding to the Bill ID field. On clicking the Search icon, the Bill Search window appears.</td><td>No</td></tr>
</table>

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- **Search Results** - On clicking the **Search** button, the search results appear based on the specified search criteria. The **Search Results** section contains the following columns:

Column Name	Column Description
Bill Information	Display information about the completed debit or credit bill. In addition, this column has a context menu which helps in navigating to other screens in the application. **Note:** It has a link. On clicking the link, the **Bill** screen appears where you can view the details of the respective bill.
Bill Date	Displays the date when the debit or credit bill is created.
Due Date	Displays the date when the debit or credit bill is due for payment.
Outstanding Amount	Displays the outstanding amount (i.e. unpaid amount) of the debit or credit bill.
Hold Amount	Displays the amount of the debit or credit bill which is kept on hold through an hold request.
Outstanding Amount (Offset Currency)	Displays the outstanding amount (i.e. unpaid amount) of the debit or credit bill in the currency in which the bill amount would be offset. **Note:** This column appears when the offset request is a cross-currency offset request.
Account Information	Indicates the account for which the debit or credit bill is created. In addition, this column has a context menu which helps in navigating to other screens in the application. **Note:** It has a link. On clicking the link, the **Account** screen appears where you can view the details of the respective account.

Note: Pagination is used to display limited number of records in the **Search Results** section. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

In addition, this section contains the following button:

Button Name	Button Description
Add	Used to add a bill to the offset request.

A check box appears corresponding to each bill. On selecting the check box, you can add the bill to the offset request. You can also select multiple bills at the same time. In addition, you can select the check box corresponding to the column header. This allows you to add all bills listed in the respective page to the offset request.

Related Topics

For more information on...	See...
How to add a debit or credit bill to an offset request	Adding a Debit or Credit Bill to an Offset Request on page 1640
How to setup the **C1-OFFSETREQ** feature configuration	Setting the C1-OFFSETREQ Feature Configuration on page 4456

Offset Request Adjustments

The **Offset Request Adjustments** zone lists the offset or transfer adjustments which are created for the bill through the offset request. It appears when the offset request is in the **Processed** status. It contains the following columns:

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Column Name	Column Description
Adjustment Information	Displays information about the offset or transfer adjustment. **Note:** It has a link. On clicking the link, the **Adjustment** screen appears where you can view the details of the respective adjustment.
From Bill ID	Indicates the bill from where the amount is offset. **Note:** It has a link. On clicking the link, the **Bill** screen appears where you can view the details of the respective adjustment.
From Adjustment ID	Indicates the adjustment from where the amount is offset. **Note:** It has a link. On clicking the link, the **Adjustment** screen appears where you can view the details of the respective adjustment.
To Bill ID	Indicates the bill against which the amount is offset. **Note:** It has a link. On clicking the link, the **Bill** screen appears where you can view the details of the respective adjustment.
To Adjustment ID	Indicates the adjustment against which the amount is offset. **Note:** It has a link. On clicking the link, the **Adjustment** screen appears where you can view the details of the respective adjustment.
Current Amount	Displays the adjustment amount.

Related Topics

For more information on...	See...
How to view the offset or transfer adjustments created through an offset request	Viewing the Adjustments Created Through an Offset Request on page 1639

Auto Maintenance Financial Transactions

The **Auto Maintenance Financial Transactions** zone lists the financial transactions which are added to the offset request for auto maintenance. It contains the following columns:

Column Name	Column Description
Coverage Start Date	Displays the date of the financial transaction from where the coverage starts.
Coverage End Date	Displays the date of the financial transaction till where the coverage ends.
Financial Transaction ID	Displays the financial transaction ID added to the offset request for auto maintenance. **Note:** It has a link. On clicking the link, the **Financial Transaction** screen appears where you can view the details of the respective financial transaction.
Amount	Displays the bill amount added in the offset request for auto maintenance.
Entity Information	Displays additional information about the bill segment. In addition, a context menu (⊙) icon appears corresponding to this field which helps in navigating to other screens in the application.

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Column Name	Column Description
	Note: It has a link. On clicking the link, the **Bill Segment** screen appears where you can view the details of the respective bill segment on clicking the link.
Adjustment Information	Displays additional information about the adjustment.
	Note: It has a link. On clicking the link, the **Adjustment** screen appears where you can view the details of the respective adjustment.
Auto Maintenance Amount	Displays the amount automatically offset against the corresponding bill amount.

Note:

Pagination is used to display limited number of records in this zone. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

The **Auto Maintenance Financial Transactions** zone appears only when you are viewing the details of an auto maintenance offset request.

Adjustment

The **Adjustment** zone lists the advance deposit details of an offset request. It contains the following columns:

Column Name	Column Description
Adjustment Information	Displays additional information about the adjustment.
	Note: It has a link. On clicking the link, the **Adjustment** screen appears where you can view the details of the respective adjustment.
Adjustment Type	Indicates the adjustment type using which the offset or transfer adjustments should be created through the offset request.
	Note: It has a link. On clicking the link, the **Adjustment Type** screen appears where you can view the details of the respective adjustment type.
Creation Date	Displays the date when the adjustment is created.
Offset Amount	Displays the total amount which is offset through the offset request.
Account Information	Indicates the account for which the adjustment is created. In addition, this column has a context menu which helps in navigating to other screens in the application.
	Note: It has a link. On clicking the link, the **Account** screen appears where you can view the details of the respective account.

Note: Pagination is used to display limited number of records in this zone. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

On clicking the **Broadcast** (📡) icon corresponding to an adjustment, the **Offset Request Adjustments** zone appears where you can view the offset or transfer adjustments created for the bill through the offset request.

Note: The **Broadcast** (📡) icon appears corresponding to a bill when the offset request is in the **Processed** or **Unapplied Offset** status.

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You can change the layout of this zone. For more information on how to change the layout, see Changing the Layout on page 4410.

Related Topics

For more information on...	See...
How to view the advance deposit adjustment created through a delinquency process	Viewing the Advance Deposit Adjustment created through a Delinquency Process on page 1640

Offset Request - Log

The **Log** tab contains the following zone:

- Offset Request Log on page 1638

Offset Request Log

The **Offset Request Log** zone lists the complete trail of actions performed on the offset request. It contains the following columns:

Column Name	Column Description
Creation Date Time	Displays the date and time when the action was performed on the offset request.
Details	Displays the details about the action performed on the offset request.
User	Indicates the user who has performed the action on the offset request.
Log Type	Indicates the type of log.
Related Object	Indicates the object or entity which is created when the action is performed on the offset request. **Note:** At present, no data appears in this column. The implementation team can build the custom logic to meet the business requirements.
Status Reason	Indicates the reason why the offset request is rejected or unapplied (i.e. canceled).

Note: You can manually add a log entry for the offset request by clicking the **Add Log Entry** link in the upper right corner of the **Offset Request Log** zone.

Related Topics

For more information on...	See...
How to view the log of an offset request	Viewing the Log of an Offset Request on page 1653
How to add a log entry for an offset request	Adding a Log Entry for an Offset Request on page 1653

Viewing the Debit and Credit Bills Added to an Offset Request

Procedure

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To view the debit and credit bills which are added to an offset request:

1. Search for the offset request in the **Offset Request** screen.
2. In the **Search Results** section, click the link in the **Offset Request Information** column corresponding to the *o*ffset request whose details you want to view.
   The **Offset Request** screen appears.
3. Ensure that the **Main** tab is selected.
4. View the debit and credit bills added to the offset request in the **Selected Bills** zone.

Related Topics

For more information on...	**See...**
How to search for an offset request	Searching for an Offset Request on page 1624
Offset Request screen	Offset Request (Used for Searching) on page 1620
Offset Request screen	Offset Request (Used for Viewing) on page 1627
Selected Bills zone	Selected Bills on page 1630

Viewing the Adjustments Created Through an Offset Request

Procedure

To view the adjustments created through an offset request:

1. Search for the offset request in the **Offset Request** screen.
2. In the **Search Results** section, click the link in the **Offset Request Information** column corresponding to the *o*ffset request whose details you want to view.
   The **Offset Request** screen appears.
3. Ensure that the **Main** tab is selected.
4. In the **Selected Bills** zone, click the **Broadcast** (ᯤ) icon corresponding to the bill whose offset or transfer adjustments you want to view.
   The **Offset Request Adjustments** zone appears.

   Note: The **Broadcast** (ᯤ) icon appears corresponding to a bill when the offset request is in the **Processed** or **Unapplied Offset** status.
5. View the offset or transfer adjustments created for the bill through the offset request in the **Offset Request Adjustments** zone.

Related Topics

For more information on...	**See...**
How to search for an offset request	Searching for an Offset Request on page 1624
Offset Request screen	Offset Request (Used for Viewing) on page 1627
Selected Bills zone	Selected Bills on page 1630
Offset Request Adjustments zone	Offset Request Adjustments on page 1635

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Viewing the Advance Deposit Adjustment created through a Delinquency Process

Procedure

To view the advance deposit adjustments created through a delinquency process:

1. Search for the offset request in the **Offset Request** screen.
2. In the **Search Results** section, click the link in the **Offset Request Information** column corresponding to the *o*ffset request whose details you want to view.
   The **Offset Request** screen appears.
3. Ensure that the **Main** tab is selected.
4. View the advance deposit adjustment created through a delinquency process in the **Adjustment** zone.

Related Topics

For more information on...	**See...**
How to search for an offset request	Searching for an Offset Request on page 1624
Offset Request screen	Offset Request (Used for Viewing) on page 1627
Adjustment zone	Adjustment on page 1637

Adding a Debit or Credit Bill to an Offset Request

Prerequisites

To add a debit or credit bill to an offset request, you should have:

- Completed bills for accounts of the main customer (whose bill is added as the primary bill in the offset request)
- Completed bills for effective child persons of the main customer (whose bill is added as the primary bill in the offset request)
- The **Allow Offsetting Across Persons** option type of the **C1-OFFSETREQ** feature configuration set to **Y** or **N** based on the business requirements

Procedure

To add a debit or credit bill to an offset request:

1. Search for the offset request in the **Offset Request** screen.
2. In the **Search Results** section, click the link in the **Offset Request Information** column corresponding to the *o*ffset request whose details you want to edit.
   The **Offset Request** screen appears.
3. Ensure that the **Main** tab is selected.
4. Enter the search criteria in the **Search Bill** zone.

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> **Note:**
>
> The **Search Bill** zone appears when the offset request is in the **Draft** status.
>
> The date range specified in the **Bill Date From** and **Bill Date To** fields should not exceed the number of days specified in the **Bill Search Period** field of the respective offset request type.
>
> ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.

5. Click **Search**.
   A list of completed bills that meet the search criteria appears in the **Search Results** section.
6. Select the check box corresponding to a completed bill that you want to add to the offset request.
7. Click the **Add** button in the **Search Bill** zone.
   A message appears indicating that the bill is added to the offset request.

> **Note:** You can only add a completed bill to an offset request when its outstanding amount is not equal to zero.

8. Click **OK**.
   The completed bill is added to the offset request. You can view the completed bills which are added to the offset request in the **Selected Bills** zone.

> **Note:** The default offset amount is calculated for each bill using the algorithm which is attached in the respective offset request type. For more information on how the default offset amount is calculated, see C1-OFST-AMT on page 1599.

Related Topics

For more information on...	See...
How to search for an offset request	Searching for an Offset Request on page 1624
Offset Request screen	Offset Request (Used for Viewing) on page 1627
Search Bill zone	Search Bill on page 1631
Selected Bills zone	Selected Bills on page 1630
How to create an offset request	Creating an Offset Request on page 1624
How to setup the **C1-OFFSETREQ** feature configuration	Setting the C1-OFFSETREQ Feature Configuration on page 4456

Editing an Offset Request

Prerequisites

To edit an offset request, you should have:

- Adjustment types defined in the application (where the **A/P Request Type Code** field is not set to **REFUND**)

Procedure

To edit an offset request:

1. Search for the offset request in the **Offset Request** screen.

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2. In the **Search Results** section, click the link in the **Offset Request Information** column corresponding to the *o*ffset request whose details you want to edit.
   The **Offset Request** screen appears.
3. Ensure that the **Main** tab is selected.
4. Click the **Edit** button in the **Offset Request** zone.

   The **Offset Request** screen appears. It contains the following sections:

   - **Main** - Used to specify the basic details about the offset request.
   - **Characteristics** - Used to define the characteristics for the offset request.
   - **Offset Details** - Used to edit the offset amount of the bills which are added to the offset request. It also allows you to remove a bill from the offset request.

   > **Note:** You can only remove secondary debit or credit bills from the offset request. And, you cannot remove a primary debit or credit bill from the offset request throughout its lifecycle.

   The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Offset Request Information	Displays information about the offset request.	Not applicable
Offset Request Type	Indicates the offset request type using which the offset request is created.	Not applicable
Adjustment Type	Used to indicate the adjustment type using which transfer or offset adjustments must be created through the offset request. **Note:** The **Search**(🔍) icon appears corresponding to the **Adjustment Type** field. On clicking the **Search** icon, the **Adjustment Type Search** window appears. On specifying the adjustment type, the description of the adjustment type appears corresponding to the **Adjustment Type** field.	Yes
Comments	Used to specify additional information about the offset request.	No

> **Note:** The **Edit** button appears when the offset request is in the **Draft** status.

5. Modify the required details in the **Main** section.
6. Define, edit, or remove characteristics of the offset request, if required.
7. Edit the offset amount of a debit or credit bill, if required.
8. Remove a debit or credit bill from the offset request, if required.
9. Click **Save**.
   The changes made to the offset request are saved.

Related Topics

For more information on...	See...
How to search for an offset request	Searching for an Offset Request on page 1624
Offset Request screen	Offset Request (Used for Viewing) on page 1627

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For more information on...	See...
Offset Request zone	Offset Request on page 1628
How to define a characteristic for an offset request	Defining a Characteristic for an Offset Request on page 1643
How to edit the offset amount of a debit or credit bill	Editing the Offset Amount of a Debit or Credit Bill on page 1644
How to remove a debit or credit bill from an offset request	Removing a Debit or Credit Bill from an Offset Request on page 1645

Defining a Characteristic for an Offset Request

Prerequisites

To define a characteristic for an offset request, you should have:

- Characteristic types defined in the application (where the characteristic entity is set to **Offset Request**)

Procedure

To define a characteristic for an offset request:

1. Ensure that the **Characteristics** section is expanded when you are editing an offset request.

   The **Characteristics** section contains the following fields in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Effective Date	Used to specify the date from when the characteristic is effective for the offset request.	Yes (Conditional) **Note:** This field is required when you are defining a characteristic for the offset request.
Characteristic Type	Used to indicate the characteristic type. **Note:** The list includes only those characteristic types where the characteristic entity is set to **Offset Request**.	Yes (Conditional) **Note:** This field is required when you are defining a characteristic for the offset request.
Characteristic Value	Used to specify the value for the characteristic type. **Note:** If you select a predefined characteristic type, the **Search** (🔍) icon appears corresponding to the **Characteristic Value** field. On clicking the **Search** icon, the **Predefined Characteristic Search** window appears. On specifying the value for a predefined characteristic type, the description of the characteristic value appears corresponding to the **Characteristic Value** field.	Yes (Conditional) **Note:** This field is required when you are defining a characteristic for the offset request.

2. Enter the required details in the **Characteristics** section.

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3. If you want to define more than one characteristic for the offset request, click the **Add** (+) icon and then *r*epeat step 2.

> **Note:** However, if you want to remove a characteristic from the offset request, click the **Delete** (🗑) icon corresponding to the characteristic.

4. Click **Save**.
   The characteristics are defined for the offset request.

Related Topics

For more information on...	See...
How to edit an offset request	Editing an Offset Request on page 1641

Editing the Offset Amount of a Debit or Credit Bill

Prerequisites

To edit the offset amount of a debit or credit bill, you should have:

- Required debit or credit bill added in the offset request

Procedure

To edit the offset amount of a debit or credit bill:

1. Ensure that the **Offset Details** section is expanded when you are editing an offset request.

   The **Offset Details** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Total Debit Offset Amount	Displays the total offset amount of all debit bills which are included in the offset request.	Not applicable
Total Credit Offset Amount	Displays the total offset amount of all credit bills which are included in the offset request.	Not applicable
Total Offset Amount	Displays the sum of the total debit and credit offset amount.	Not applicable

   In addition, this section contains the following fields in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Bill ID	Indicates the debit or credit bill which is added to the offset request.	Not applicable
Outstanding Amount	Displays the outstanding amount (i.e. unpaid amount) of the debit or credit bill.	Not applicable
Due Date	Displays the date when the debit or credit bill is due for payment.	Not applicable
Debit Balance	Displays the sum of the unpaid debit line items of a bill.	Not applicable
Credit Balance	Displays the sum of the open credit line items of a bill	Not applicable
Credit Bill	Used to indicate whether you want to consider a debit bill with a credit line item as a credit bill in the offset request. By default, this option is selected for a bill with the credit or zero balance and it is not editable.	No

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Field Name	Field Description	Mandatory (Yes or No)
	Note: You cannot select this option for a debit bill for which no credit line item exists, and therefore, in such case, this option is disabled.	
Hold Amount	Displays the amount of the debit or credit bill which is kept on hold through an hold request.	Not applicable
Outstanding Amount (Offset Currency)	Displays the outstanding amount (i.e. unpaid amount) of the debit or credit bill in the currency in which the bill amount would be offset. **Note:** This field appears when the offset request is a cross-currency offset request.	Not applicable
Offset Amount	Used to specify the amount which you want to offset from the debit or credit bill.	Yes
Remaining Bill Balance	Displays the remaining outstanding amount of the debit or credit bill (i.e. Outstanding Amount - Hold Amount - Offset Amount).	Not applicable
Updated Hold Amount	Displays the new hold amount (i.e. Current Hold Amount + Remaining Bill Balance) for the debit or credit bill which is derived when the remaining bill balance is less than the current hold amount.	Not applicable

The **Delete** (🗑) icon appears corresponding to the secondary debit or credit bills in the **Offset Details** section. It allows you to remove the respective bill from the offset request.

2. Modify the offset amount of the required debit or credit bill in the **Offset Details** section.
3. Click **Save**.
   The changes made to the offset request are saved.

Related Topics

For more information on...	See...
How to edit an offset request	Editing an Offset Request on page 1641
How to remove a debit or credit bill from an offset request	Removing a Debit or Credit Bill from an Offset Request on page 1645

Removing a Debit or Credit Bill from an Offset Request

Procedure

To remove a debit or credit bill from an offset request:

1. Ensure that the **Offset Details** section is expanded when you are editing an offset request.
2. Click the **Delete** (🗑) icon corresponding to the debit or credit bill that you want to remove from the offset request.
   A message appears confirming whether you want to delete the bill.

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> **Note:** The **Delete** (🗑) icon appears corresponding to the secondary debit or credit bills. It does not appear corresponding to the primary debit or credit bill. This is because you cannot remove a primary debit or credit bill from the offset request throughout its lifecycle.

3. Click **OK**.
   The debit or credit bill is removed from the offset request.

Related Topics

For more information on...	See...
How to edit an offset request	Editing an Offset Request on page 1641

Deleting an Offset Request

Procedure

To delete an offset request:

1. Search for the offset request in the **Offset Request** screen.
2. In the **Search Results** section, click the link in the **Offset Request Information** column corresponding to the *o*ffset request that you want to delete.
   The **Offset Request** screen appears.
3. Ensure that the **Main** tab is selected.
4. Click the **Delete** button in the **Offset Request** zone.
   A message appears confirming whether you want to delete the offset request.

> **Note:** The **Delete** button appears when the offset request is in the **Draft** status.

5. Click **OK**.
   The offset request is deleted.

Related Topics

For more information on...	See...
How to search for an offset request	Searching for an Offset Request on page 1624
Offset Request screen	Offset Request (Used for Viewing) on page 1627
Offset Request zone	Offset Request on page 1628

Submitting an Offset Request

Prerequisites

To submit an offset request, you should have:

- At least one debit and credit bills added to the offset request
- Offset amount of each bill not equal to zero
- Total debit offset amount equal to total credit offset amount in the offset request
- Negative offset amount for each debit bill and positive offset amount for each credit bill
- Offset amount less than or equal to the current outstanding amount of the bill

Procedure

To submit an offset request:

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1. Search for the offset request in the **Offset Request** screen.
2. In the **Search Results** section, click the link in the **Offset Request Information** column corresponding to the *o*ffset request which you want to submit.
   The **Offset Request** screen appears.
3. Ensure that the **Main** tab is selected.
4. Click the **Submit** button in the **Offset Request** zone.

   The system behaves in the following manner:

If...	**Then**
The **Approval Required** option is selected in the respective offset request type	A To Do of the **C1-OFSRQ** To Do type is created and sent to the approver. The status of the offset request is then changed to **Approval In Progress**.
The **Approval Required** option is not selected in the respective offset request type and the number of financial transactions created for the bills (which are selected in the offset request) exceeds the defer processing count (defined in the respective offset request type)	The status of the offset request is changed to **Deferred Processing**. On executing the **Offset Request Periodic Monitor (C1-OFSRQ)** batch, the system considers the offset requests which are in the **Deferred Processing** status. If the **Transfer Adjustment** option is selected in the respective offset request type, the system creates the transfer adjustments using the adjustment type which is specified in the offset request. The status of the transfer adjustments is set to **Frozen**. However, if the **Transfer Adjustment** option is not selected in the respective offset request type, the system creates the offset adjustments using the adjustment type which is specified in the offset request. The status of the offset adjustments is set to **Frozen**. Finally, the status of the offset request is changed to **Processed**.
	Note: If a match event exists for the match type entity (i.e. bill, bill segment, or contract), the existing match event is stamped on the offset or transfer adjustment and on the corresponding bill segment or bill segment cancelation financial transaction. However, if a match event does not exist, a new match event is created and stamped on the offset or transfer adjustment and on the corresponding bill segment or bill segment cancelation financial transaction. In case of partial offset, the status of the corresponding match event is set to **Open**. However, if the entire match type entity amount is offset, the status of the corresponding match event is set to **Balanced**. For more information on how the offset amount is distributed, see C1-OFST-DIST on page 1589.
The **Approval Required** option is not selected in the respective offset request type and the number of financial transactions created for the bills (which are selected in the offset request) does not exceed the defer processing count (defined in the respective offset request type)	If the **Transfer Adjustment** option is selected in the respective offset request type, the system creates the transfer adjustments using the adjustment type which is specified in the offset request. The status of the transfer adjustments is set to **Frozen**. However, if the **Transfer Adjustment** option is not selected in the respective offset request type, the system creates the offset adjustments using the adjustment type which is specified in the offset request. The status of the offset adjustments is set to **Frozen**. Finally, the status of the offset request is changed to **Processed**.

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If...	Then
	Note: If a match event exists for the match type entity (i.e. bill, bill segment, or contract), the existing match event is stamped on the offset or transfer adjustment and on the corresponding bill segment or bill segment cancelation financial transaction. However, if a match event does not exist, a new match event is created and stamped on the offset or transfer adjustment and on the corresponding bill segment or bill segment cancelation financial transaction. In case of partial offset, the status of the corresponding match event is set to **Open**. However, if the entire match type entity amount is offset, the status of the corresponding match event is set to **Balanced**. For more information on how the offset amount is distributed, see C1-OFST-DIST on page 1589.

Note: The **Submit** button appears when the offset request is in the **Draft** status.

Related Topics

For more information on...	See...
How to search for an offset request	Searching for an Offset Request on page 1624
Offset Request screen	Offset Request (Used for Viewing) on page 1627
Offset Request zone	Offset Request on page 1628

Approving an Offset Request

You can view the number of offset requests which are pending for approval in the **Offset Request** screen. The approver can review, and accordingly approve or reject the offset request based on the observations.

Note: The system will not allow you to approve or reject an offset request submitted by you.

Prerequisites

To approve an offset request, you should have:

- Approval To Do role assigned in the system

Procedure

To approve an offset request:

1. Do either of the following:

If you want to...	Then...
Approve an offset request through the Offset Request screen	**a.** Search for the offset request in the **Offset Request** screen. **b.** In the **Search Results** section, click the link in the **Offset Request Information** column corresponding to the offset request which you want to review.
Approve an offset request through the To Do List screen	**a.** Click the **Menu** link in the **Application** toolbar. A list appears. **b.** From the **Main** menu, select **To Do** and then click **To Do List**.

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If you want to...	Then...
	The **To Do Type for User Search** window appears. **c.** Enter **C1-OFSRQ** in the **To Do Type** field. **d.** Click the **Search** button corresponding to the **To Do Type** field. The **To Do List** screen appears. **e.** Select the **Open** option from the **Filter by** list to view all unassigned To Dos. **f.** Click the link in the **Message** column corresponding to the To Do of the offset request that you want to review.

The **Offset Request** screen appears.

2. Review the details in the **Offset Request** screen.
3. If the information in the offset request is accurate, click the **Approve** button in the **Offset Request** zone.

The system behaves in the following manner:

If...	Then
The number of financial transactions created for the bills (which are selected in the offset request) exceeds the defer processing count (defined in the respective offset request type)	The status of the offset request is changed to **Deferred Processing**. On executing the **Offset Request Periodic Monitor (C1-OFSRQ)** batch, the system considers the offset requests which are in the **Deferred Processing** status. If the **Transfer Adjustment** option is selected in the respective offset request type, the system creates the transfer adjustments using the adjustment type which is specified in the offset request. The status of the transfer adjustments is set to **Frozen**. However, if the **Transfer Adjustment** option is not selected in the respective offset request type, the system creates the offset adjustments using the adjustment type which is specified in the offset request. The status of the offset adjustments is set to **Frozen**. Finally, the status of the offset request is changed to **Processed**.
	Note: If a match event exists for the match type entity (i.e. bill, bill segment, or contract), the existing match event is stamped on the offset or transfer adjustment and on the corresponding bill segment or bill segment cancelation financial transaction. However, if a match event does not exist, a new match event is created and stamped on the offset or transfer adjustment and on the corresponding bill segment or bill segment cancelation financial transaction. In case of partial offset, the status of the corresponding match event is set to **Open**. However, if the entire match type entity amount is offset, the status of the corresponding match event is set to **Balanced**. For more information on how the offset amount is distributed, see C1-OFST-DIST on page 1589.
The number of financial transactions created for the bills (which are selected in the offset request) does not exceed the defer processing count (defined in the respective offset request type)	If the **Transfer Adjustment** option is selected in the respective offset request type, the system creates the transfer adjustments using the adjustment type which is specified in the offset request. The status of the transfer adjustments is set to **Frozen**. However, if the **Transfer Adjustment** option is not selected in the respective offset request type, the system creates the offset adjustments using the adjustment type which is specified in the offset request. The status of the offset adjustments is set to

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If...	Then
	Frozen. Finally, the status of the offset request is changed to **Processed**.
	Note: If a match event exists for the match type entity (i.e. bill, bill segment, or contract), the existing match event is stamped on the offset or transfer adjustment and on the corresponding bill segment or bill segment cancelation financial transaction. However, if a match event does not exist, a new match event is created and stamped on the offset or transfer adjustment and on the corresponding bill segment or bill segment cancelation financial transaction. In case of partial offset, the status of the corresponding match event is set to **Open**. However, if the entire match type entity amount is offset, the status of the corresponding match event is set to **Balanced**. For more information on how the offset amount is distributed, see C1-OFST-DIST on page 1589.

Note: The **Approve** button appears when:

- The offset request is in the **Approval In Progress** status.
- A user with the approval To Do role is reviewing the offset request.

Related Topics

For more information on...	See...
How to search for an offset request	Searching for an Offset Request on page 1624
Offset Request screen	Offset Request (Used for Viewing) on page 1627
Offset Request zone	Offset Request on page 1628

Rejecting an Offset Request

Prerequisites

To reject an offset request, you should have:

- Reasons defined for the **Rejected** status of the **C1-OffsetRequest** business object in the **Status Reason** screen

Note: The system will not allow you to approve or reject an offset request submitted by you.

Procedure

To reject an offset request:

1. Do either of the following:

If you want to...	Then...
Reject an offset request through the Offset Request screen	a. Search for the offset request in the **Offset Request** screen. b. In the **Search Results** section, click the link in the **Offset Request Information** column corresponding to the offset request which you want to review.

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If you want to...	Then...
Reject an offset request through the To Do List screen	**a.** Click the **Menu** link in the **Application** toolbar. A list appears. **b.** From the **Main** menu, select **To Do** and then click **To Do List**. The **To Do Type for User Search** window appears. **c.** Enter **C1-OFSRQ** in the **To Do Type** field. **d.** Click the **Search** button corresponding to the **To Do Type** field. The **To Do List** screen appears. **e.** Select the **Open** option from the **Filter by** list to view all unassigned To Dos. **f.** Click the link in the **Message** column corresponding to the To Do of the offset request that you want to review.

The **Offset Request** screen appears.

2. Review the details in the **Offset Request** screen.
3. If the information in the offset request is incorrect, click the **Reject** button in the **Offset Request** zone.

   The **Reject Offset Request** window appears. It contains following fields:

Field Name	Field Description	Mandatory (Yes or No)
Status Reason	Used to indicate the reason why you want to reject the offset request.	Yes
Comments	Used to specify additional information while rejecting the offset request.	No

Note: The **Reject** button appears when:

- The offset request is in the **Approval In Progress** status.
- A user with the approval To Do role is reviewing the offset request.

4. Select the reason for rejecting the offset request from the **Status Reason** list.
5. Click **Save**.
   The status of the offset request is changed to **Rejected**.

Related Topics

For more information on...	See...
How to search for an offset request	Searching for an Offset Request on page 1624
Offset Request screen	Offset Request (Used for Viewing) on page 1627
Offset Request zone	Offset Request on page 1628

Unapplying an Offset Request

There might be situations when an incorrect offset request is processed in the system. In such case, the system provides you with an ability to unapply (i.e. cancel) the offset request. However, note that you can cancel an offset request when the offset request is in the **Processed** status.

Prerequisites

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To cancel an offset request, you should have:

- Reasons defined for the **Unapplied Offset** status of the **C1-OffsetRequest** business object in the **Status Reason** screen

Procedure

To cancel an offset request:

1. Search for the offset request in the **Offset Request** screen.
2. In the **Search Results** section, click the link in the **Offset Request Information** column corresponding to the *o*ffset request that you want to cancel.
   The **Offset Request** screen appears.
3. Click the **Unapply** button in the **Offset Request** zone.

   The **Unapply Reason** window appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Unapply Reason	Used to indicate the reason why you want to cancel the offset request.	Yes
Comments	Used to specify additional information while canceling the offset request.	No

Note: The **Unapply** button appears when the offset request is in the **Processed** status.

4. Select the reason for canceling the offset request from the **Unapply Reason** list.
5. Click **Save**.

   The system behaves in the following manner:

If...	Then...
The number of transfer or offset adjustments does not exceed the online record process limit (which is defined in the **C1-DFRUNAPLY** algorithm)	The system cancels the frozen transfer or offset adjustments immediately and then changes the status of the offset request to **Unapplied Offset**.
The number of transfer or offset adjustments exceeds the online record process limit (which is defined in the **C1-DFRUNAPLY** algorithm)	The system changes the status of the offset request to **Defer Unapplied**. On executing the **Offset Request Periodic Monitor (C1-OFSRQ)** batch, the system considers the offset requests which are in the **Defer Unapplied** status. The system then cancels the frozen transfer or offset adjustments of the offset request and changes the status of the offset request to **Unapplied Offset**.

Related Topics

For more information on...	See...
How to search for an offset request	Searching for an Offset Request on page 1624
Offset Request screen	Offset Request (Used for Viewing) on page 1627
Offset Request zone	Offset Request on page 1628

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Viewing the Log of an Offset Request

Procedure

To view the log of an offset request:

1. Search for the offset request in the **Offset Request** screen.
2. In the **Search Results** section, click the link in the **Offset Request Information** column corresponding to the *o*ffset request whose details you want to view.
   The **Offset Request** screen appears.
3. Click the **Log** tab.
   The **Log** tab appears.
4. View the complete trail of actions performed on the offset request in the **Offset Request Log** zone.

Related Topics

For more information on...	See...
How to search for an offset request	Searching for an Offset Request on page 1624
Offset Request screen	Offset Request (Used for Viewing) on page 1627
Offset Request Log zone	Offset Request Log on page 1638
How to add a log entry for an offset request	Adding a Log Entry for an Offset Request on page 1653

Adding a Log Entry for an Offset Request

Procedure

To add a log entry for an offset request:

1. Search for the offset request in the **Offset Request** screen.
2. In the **Search Results** section, click the link in the **Offset Request Information** column corresponding to the *o*ffset request for which you want to add a log entry.
   The **Offset Request** screen appears.
3. Click the **Log** tab.
   The **Log** tab appears.
4. Click the **Add Log Entry** link in the upper right corner of the **Offset Request Log** zone.

   The **Add Request Log** window appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Request Information	Displays information about the offset request.	Not applicable
Log Details	Used to specify additional comments for the offset request.	Yes

5. Enter the comments in the **Log Details** field.
6. Click **Save**.
   The log entry is added in the **Offset Request Log** zone.

Related Topics

For more information on...	See...
How to search for an offset request	Searching for an Offset Request on page 1624

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For more information on...	See...
Offset Request screen	Offset Request (Used for Viewing) on page 1627
Offset Request Log zone	Offset Request Log on page 1638

Chapter 25

Funding Request

Topics:

- Prerequisites
- Funding Request (Without Approval) Status Transition
- Funding Request (With Approval) Status Transition
- Algorithms Used in C1-FundingReq
- Funding Request Type
- Funding Request (Used for Searching)
- Funding Request (Used for Viewing)

Oracle Revenue Management and Billing provides the automatic payment facility for an account. The system automatically calculates the automatic payment amount during the bill completion and stamps these details against the bill in the **CI_BILL_ACH** table. However, there might be situations when you would like to do the following before stamping the automatic payment amount against the bill in the **CI_BILL_ACH** table:

- Hold certain amount on the bill through a hold request
- Offset the bill against another bill through an offset request
- Transfer the amount on the credit bill to one or more garnishment contracts of the account

The system enables you to change the automatic payment amount through the funding process. The funding process supports all three automatic payment creation options (i.e. Create At Bill Completion, Create On Extract Date, and Freeze Payment on Notification).

While creating a funding request, you need to specify a funding request type using which you want to create the funding request. It is the funding request type which helps the system to determine:

- The business object using which the funding request should be created in the system.
- The currency in which the total debit and credit amount should be calculated.
- The account funding currency characteristic type which must be defined on the account. This characteristic indicates that the funding amount of the account's bills should be calculated in the specified currency.
- The default funding adjustment type using which the A/P adjustment should be created against a credit bill.

  Note: In the **Default Funding Adjustment Type** field, you can only specify an adjustment type where the **A/P Request Type Code** field is set to **REFUND**.
- The default garnishment adjustment type using which the garnishment adjustment should be created when the amount from the credit bill is transferred to the garnishment contract of the account.

  Note: In the **Default Garnishment Adjustment Type** field, you can only specify an adjustment type where the **A/P Request Type Code** field is not set to **REFUND**.
- Whether the approval is required for the funding request.
- An algorithm which helps to calculate the threshold range for a bill based on the number of payments made for the bill in the specified period.
- Whether a funding request must be processed in the deferred mode when the number of bills in the funding request exceeds the defer processing count.

- The currency conversion algorithms which must be used while determining the approval hierarchy for the funding request.

Note: The **Funding Request (C1-FundingReq)** business object is shipped with the product.

Once you specify a funding request type, the funding request is created in the **Draft** status. You can then add one or more debit or credit bills in the funding request. Note that you can only add bills of those accounts for which the **Defer Auto Pay** option is selected on the customer class. Once the bills are added, you can submit a funding request. Before you submit a funding request, you can do the following:

- Hold certain amount on the bill through a hold request
- Offset the bill against another bill through an offset request
- Transfer the amount on the credit bill to one or more garnishment contracts of the account

Note: The garnishment contract is a contract which is created using a contract type where the **Special Role Flag** field is set to **Garnishment**.

The system calculates the funding amount in the following manner:

Bill Type	Funding Amount for the Bill
Debit Bill	Outstanding Bill Amount - Hold Amount (set on the bill in a hold request) - Offset Amount (set on the bill in an offset request)
Credit Bill	Outstanding Bill Amount - Hold Amount (set on the bill in a hold request) - Offset Amount (set on the bill in an offset request) - Garnishment Amount (set on the bill in the funding request)

You can delete, cancel, or submit a funding request which is in the **Draft** status. On canceling a funding request, the status of all records in the funding request is changed to **Excluded** and the status of the funding request is changed to **Canceled**. On submitting a funding request, the status of the funding request is changed to either **Deferred Processing** or **Create Funding** depending on whether the number of bills in the funding request exceeds the defer processing count. Once the **Funding Request Periodic Monitor (C1-FNDRQ)** batch is executed, it checks whether there are any funding requests in the **Deferred Processing** status. If so, it changes the status of the funding request to **Create Funding**.

Once the status of a funding request is changed to **Create Funding**, the system creates the A/P adjustment against a bill when the funding amount of the bill is in credit. It also creates non A/P adjustments using the garnishment adjustment type when the funding amount of a credit bill is transferred to the garnishment contracts of the account. However, if the funding amount of a bill is in debit, the funding amount is stamped as the automatic payment amount against the bill in the **CI_BILL_ACH** table. Then, on executing the **Create Automatic Payments and Refunds (APAYCRET)** batch, the system creates automatic payment and payment event for such bill.

You can optionally configure the approval process for the funding request. If the **Approval Required** option is selected in the funding request type, the status of the funding request is changed to **Approval In Progress** on submitting the funding request. The system calculates the sum of total debit and credit amount

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in the funding request. Depending on whether the sum total is debit or credit, the system uses the debit or credit hierarchy in the approval profile (which is specified in the funding request type), respectively. If the sum total is less than the minimum threshold amount, the system automatically approves the funding request and changes the status of the funding request to either **Deferred Processing** or **Create Funding** depending on whether the number of bills in the funding request exceeds the defer processing count. However, if the sum total is equal to or greater than the threshold amount specified at the first level in the approval hierarchy, the system creates a To Do using the To Do type specified in the approval profile and assigns it to the users with the To Do role defined at the first level in the approval hierarchy.

Once the approver at the first level in the approval hierarchy approves the funding request, the system checks whether the sum total of the debit and credit amount is equal to or greater than the threshold amount specified at the next level in the approval hierarchy. If the sum total of the debit and credit amount is equal to or greater than the threshold amount specified at the next level in the approval hierarchy, the system changes the status of the funding request to **Approval In Progress**. However, if the sum total of the debit and credit amount is less than the threshold amount specified at the next level in the approval hierarchy, the system changes the status of the funding request to either **Deferred Processing** or **Create Funding** depending on whether the number of bills in the funding request exceeds the defer processing count.

If an approver rejects a funding request, the status of the funding request is changed to **Rejected**. And, if an approver requests to resubmit a funding request for approval, the status of the funding request is changed to **Draft**. You can then edit the funding request and resubmit it for approval. The system allows the submitter to withdraw the funding request when it is in the **Approval In Progress** status. On withdrawing a funding request, the status of the funding request is changed to **Draft**.

If a funding request is created automatically through a custom batch, the system allows you to manually exclude some bills from the funding request when it is in the **Draft** status. You can exclude a bill from a funding request by changing its status to **Excluded**.

For more information on how to setup the funding request process, see Prerequisites on page 1658.

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Prerequisites

To setup the funding request process, you need to do the following:

- Define the required funding request types in the system
- Define the required funding adjustment types where the **A/P Request Type Code** field is set to **REFUND**
- Define the required garnishment adjustment types where the **A/P Request Type Code** field is not set to **REFUND**
- Define the required characteristic types where the characteristic entity is set to **Funding Request Type**
- Define the required characteristic types where the characteristic entity is set to **Funding Request**
- Define the required approval profiles with the debit and credit approval hierarchy in the system
- Specify the **C1-FNDAP** To Do type in the approval profile which you want to use in the funding request's approval process
- Specify the **C1-FNDSB** as the submitter To Do type in the funding request types
- Define the status reasons for the **Rejected** status of the **C1-FundingRequest** business object in the **Status Reason** screen
- Assign the **C1-FNDAP** To Do type to a To Do role whose users must receive a To Do while submitting a funding request for approval
- Assign the **C1-FNDSB** To Do type to a To Do role whose users must receive a To Do when an approver requests to resubmit the funding request for approval
- Select the **Defer Auto Pay** option on the customer class of the accounts for which you want to use the funding process
- Define the values for the **CAN_RSN_CD_FLG** lookup field
- Define the **Funding Currency** characteristic type where the characteristic entity is set to **Account**
- Define a currency conversion algorithm for payments using the **C1_CURALGPY** algorithm type
- Define a currency conversion algorithm for adjustments using the **C1_CURALGAD** algorithm type
- Attach the currency conversion algorithms to the **Currency Conversion For Adjustments** and **Currency Conversion For Payments** algorithm spots to the required divisions
- Set the batch control type of the **Funding Request Periodic Monitor (C1-FNDRQ)** batch to **Timed** and define the following attributes:
  - Time Interval
  - Timer Active
  - User ID
  - Batch Language
  - Email Address

Funding Request (Without Approval) Status Transition

The following figure graphically indicates how a funding request moves from one status to another when the approval process is not configured in the funding request type:

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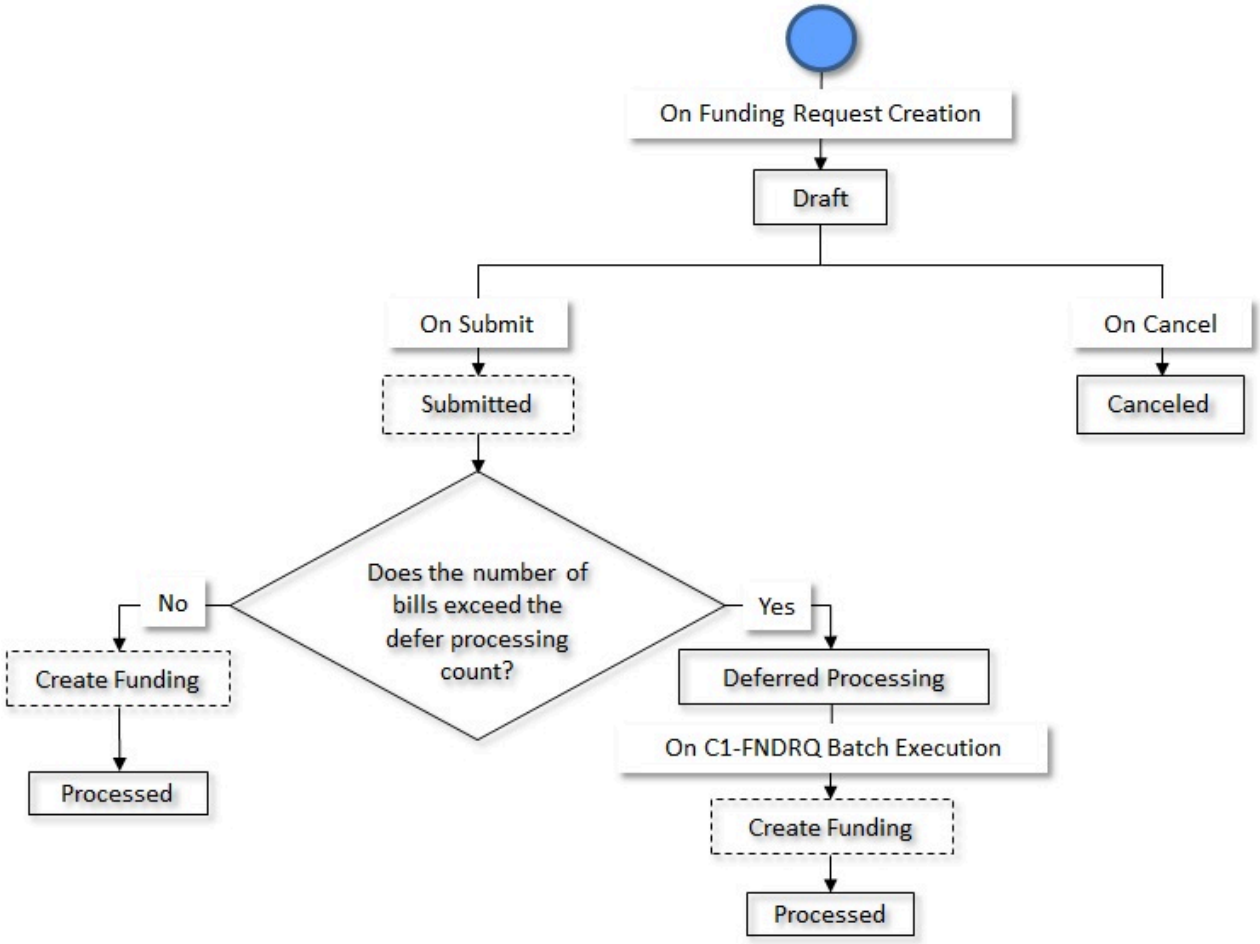

Funding Request (With Approval) Status Transition

The following figure graphically indicates how a funding request moves from one status to another when the approval process is configured in the funding request type:

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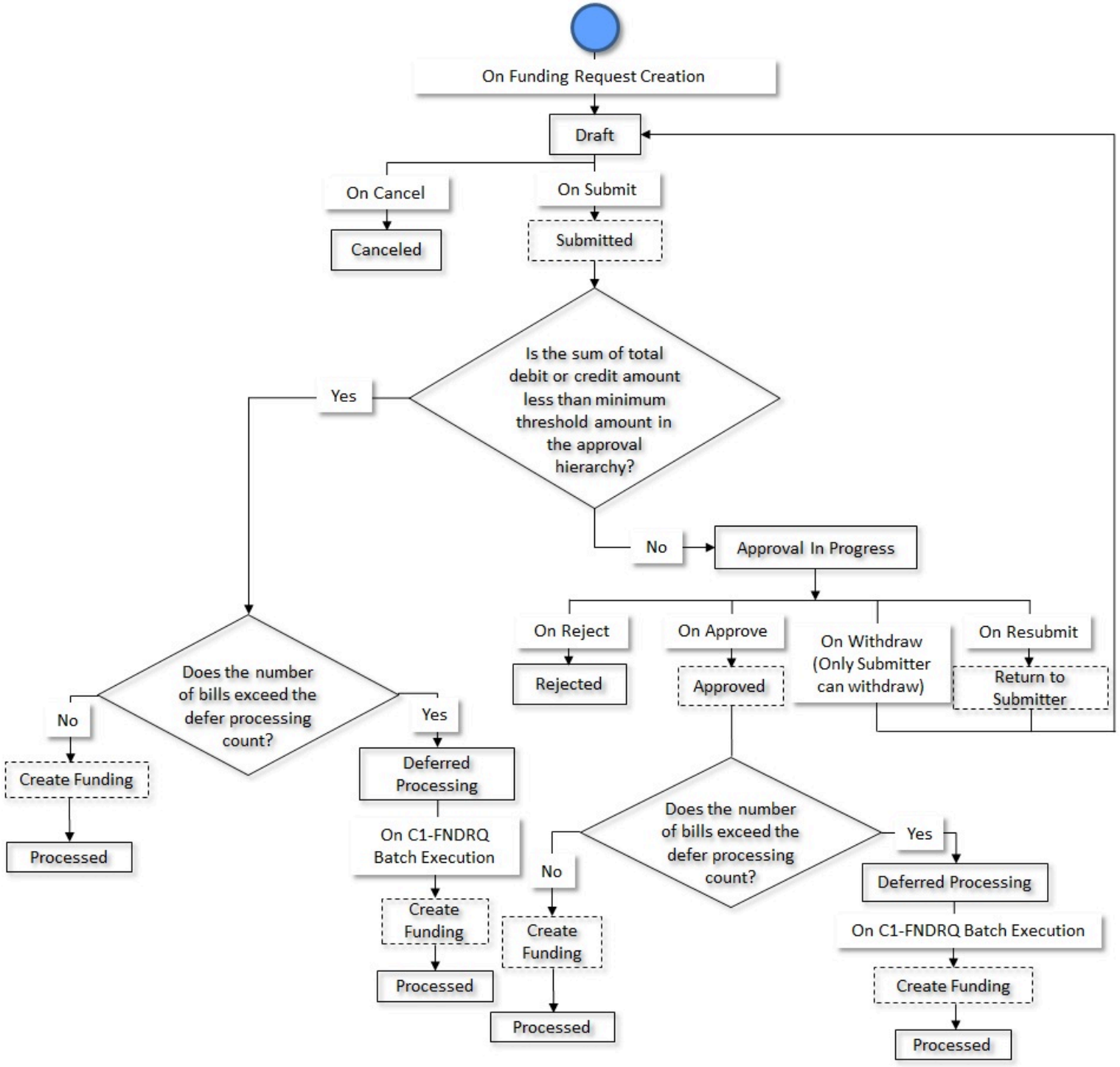

Algorithms Used in C1-FundingReq

The following table lists the algorithm which is attached to the **C1-FundingReq** business object:

System Event	Algorithm	Algorithm Type	Description
Information	C1-FUNDINFO	C1-FUNDINFO	Refer to C1-FUNDINFO on page 1661

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The following table lists the algorithms which are used in the lifecycle of the **C1-FundingReq** business object:

Status	System Event	Algorithm	Algorithm Type	Description
Draft	Exit	F1-TODOCOMPL	F1-TODOCOMPL	Refer to F1-TODOCOMPL on page 1469
Submitted	Enter	C1-FUNDSUBMT	C1-FUNDSUBMT	Refer to C1-FUNDSUBMT on page 1661
Approval In Progress	Enter	C1-FUNDAPP	C1-FUNDAPP	Refer to C1-FUNDAPP on page 1662
Approval In Progress	Exit	F1-TODOCOMPL	F1-TODOCOMPL	Refer to F1-TODOCOMPL on page 1469
Approved	Enter	C1-FUNDAPRVD	C1-FUNDAPRVD	Refer to C1-FUNDAPRVD on page 1662
Rejected	-	-	-	-
Deferred Processing	Monitor	F1-AT-RQJ	F1-AT-RQJ	Refer to F1-AT-RQJ on page 225
Return to Submitter	Enter	C1-FNDRESUBM	C1-FNDRESUBM	Refer to C1-FNDRESUBM on page 1663
Creating Funding	Monitor	F1-AT-RQJ	F1-AT-RQJ	Refer to F1-AT-RQJ on page 225
Creating Funding	Enter	C1-FUNDVAL	C1-FUNDVAL	Refer to C1-FUNDVAL on page 1663
Creating Funding	Enter	C1-FUNDAPAY	C1-FUNDAPAY	Refer to C1-FUNDAPAY on page 1663
Creating Funding	Enter	C1-FUNDADJCR	C1-FUNDADJCR	Refer to C1-FUNDADJCR on page 1663
Processed	-	-	-	-
Canceled	Enter	C1-FUNDCANCL	C1-FUNDCANCL	Refer to C1-FUNDCANCL on page 1664

C1-FUNDINFO

This algorithm generates the funding request information string which appears throughout the application. It concatenates the following fields separated by a comma in the specified order:

1. Funding Request Type Description
2. Funding Request Status Description
3. Funding Request ID

C1-FUNDSUBMT

This algorithm is invoked when you submit a funding request. If the approval process is not configured in the funding request type, it changes the status of the funding request to either **Deferred Processing** or **Create Funding** depending on whether the number of bills in the funding request exceeds the defer processing count. If the approval process is configured in the funding request type, it calculates the sum of total debit and credit amount in the funding request. Depending on whether the sum total is debit or credit, it uses the debit or credit hierarchy in the approval profile (which

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is specified in the funding request type), respectively. If the sum total is less than the minimum threshold amount in the approval hierarchy, the funding request is automatically approved by the system and the status of the funding request is changed to either **Deferred Processing** or **Create Funding** depending on whether the number of bills in the funding request exceeds the defer processing count. However, if the sum total is equal to or greater than the threshold amount specified at the first level in the approval hierarchy, the status of the funding request is changed to **Approval In Progress**.

Note: If the **Currency Conversion Required** option is selected in the approval profile, the system does currency conversion when the sum total of the debit and credit amount is in a currency which is different from the installation options currency. During the currency conversion of the sum total which is in debit, the system uses the currency conversion algorithm specified in the **Currency Conversion Payment Algorithm** field of the funding request type. However, during the currency conversion of the sum total which is in credit, the system uses the currency conversion algorithm specified in the **Currency Conversion Adjustment Algorithm** field of the funding request type.

C1-FUNDAPP

This algorithm is invoked when the status of the funding request is changed to **Approval In Progress**. It creates a To Do using the To Do type specified in the approval profile and assigns it to the users with the To Do role defined at the first level in the approval hierarchy. In addition, a log entry is created for the funding request when the To Do is created.

Note: If a funding request needs approval from the subsequent level in the approval hierarchy, this algorithm creates a To Do and assigns it to the users with the To Do role defined at the subsequent level in the approval hierarchy.

C1-FUNDAPRVD

This algorithm is invoked when you approve a funding request. It checks whether the sum total of the debit and credit amount is equal to or greater than the threshold amount specified at the next level in the approval hierarchy. If the sum total of the debit and credit amount is equal to or greater than the threshold amount specified at the next level in the approval hierarchy, the status of the funding request is changed to **Approval In Progress**. However, if the sum total of the debit and credit amount is less than the threshold amount specified at the next level in the approval hierarchy, the status of the funding request is changed to either **Deferred Processing** or **Create Funding** depending on whether the number of bills in the funding request exceeds the defer processing count.

Note: If the **Currency Conversion Required** option is selected in the approval profile, the system does currency conversion when the sum total of the debit and credit amount is in a currency which is different from the installation options currency. During the currency conversion of the sum total which is in debit, the system uses the currency conversion algorithm specified in the **Currency Conversion Payment Algorithm** field of the funding request type. However, during the currency conversion of the sum total which is in credit, the system uses the currency conversion algorithm specified in the **Currency Conversion Adjustment Algorithm** field of the funding request type.

F1-TODOCOMPL

This algorithm completes the To Do entries that are linked to an object when the object exits the given status. It finds and completes all open To Do entries where the business object's primary key is defined as a drill key. However, if the **Exclude To Do Entries From Auto Completion** (**F1-EXLTD**) characteristic is set to **Y** for a To Do type, the system does not automatically complete the respective To Do entry.

This algorithm contains the following parameter:

- **'Do Not Complete To Do Type' Char Type** – Used to specify the characteristic type that indicates whether the To Do entries should be automatically completed or not.

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Note: The **F1-EXLTD** characteristic type is shipped with the product. You can either use the **F1-EXLTD** characteristic type or a custom characteristic type, if required. Note that you must specify a predefined characteristic type where the characteristic entity is set to **To Do Type** and the predefined values are set to **Y** or **N**.

F1-AT-RQJ

This algorithm transitions the current status of the business object to the specified status. It contains the following parameters:

- **Next Status** – Used when you want to override the default next status specified in the lifecycle.
- **Next Transition Condition** – Used when you want to override the default next transition condition specified in the lifecycle.

At a time, you can specify value for either the **Next Status** or **Next Transition Condition** parameter. If you don't specify any value for these parameters, the system will transition the business object to the default next status specified in its lifecycle.

C1-FNDRESUBM

This algorithm is invoked when the status of the funding request is changed to **Return to Submitter**. It changes the status of the funding request to **Draft**. The submitter can then make the required changes and resubmit the funding request for approval. In addition, it creates a To Do using the submitter To Do type which is specified in the funding request type. Once a To Do is created, it is assigned to all users with a submitter To Do role which is specified in the funding request type.

C1-FUNDVAL

This algorithm is invoked when the status of the funding request is changed to **Create Funding**. It checks whether the funding amount of a debit bill is equal to the bill outstanding amount minus hold and offset amount set on the bill (i.e. Funding Amount = Outstanding Bill Amount - Hold Amount - Offset Amount). Similarly, it checks whether the funding amount of a credit bill is equal to the bill outstanding amount minus hold, offset, and garnishment amount set on the bill (i.e. Funding Amount = Outstanding Bill Amount - Hold Amount - Offset Amount - Garnishment Amount). If so, it executes the next algorithm. However, if the funding amount is incorrect, the status of the record in the funding request is changed to **Error**.

C1-FUNDAPAY

If the funding amount of a bill is in debit, it stamps the funding amount as the automatic payment amount against the bill in the **CI_BILL_ACH** table. Then, on executing the **Create Automatic Payments and Refunds (APAYCRET)** batch, the system creates automatic payment and payment event for such bill.

It considers the records in the funding request which are in the **Pending** status. Once the **CI_BILL_ACH** table is updated, the status of the record in the funding request is changed to **Processed**. If any error occurs while updating the **CI_BILL_ACH** table, the status of the record in the funding request is changed to **Error**.

C1-FUNDADJCR

If the funding amount of a bill is in credit, it creates the A/P adjustments using the funding adjustment type. It also creates non A/P adjustments using the garnishment adjustment type when the funding amount of a credit bill is transferred to the garnishment contracts of the account.

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It considers the records in the funding request which are in the **Pending** status. Once the adjustments are created, the status of the record in the funding request is changed to **Processed**. If any error occurs while creating the adjustments, the status of the record in the funding request is changed to **Error**.

Points to Note:

- The system uses the funding and garnishment adjustment types from the funding request.
- The main customer's address is used while creating the A/P adjustment for a credit bill.
- The garnishment adjustments are created against the garnishment contracts of the account. A garnishment contract is a contract which is created using a contract type where the **Special Role Flag** field is set to **Garnishment**.
- The system allows you to transfer funding amount to multiple garnishment contracts of the account. Accordingly, the number of non A/P adjustments will be created using the garnishment adjustment type.

It contains the following parameters:

- **Adjustment Type** - Used to indicate the adjustment type using which the adjustment should be created against the credit bill for internal offsetting.
- **Match Type Entity Flag** - Used to indicate the match type entity on which a new match event must be created when no payment exists for the credit bill. The valid values are:
  - **BILL** - Used when you want to create the same match event on all financial transactions of a bill.
  - **BSEG** - Used when you want to create a unique match event for each bill line item (such as, bill segment or adjustment).
  - **SA** - Used when you want to create the same match event on the bill line items which are created against the same contract.

C1-FUNDCANCL

This algorithm is invoked when you cancel a funding request. It excludes all debit and credit bills from the funding request and changes the status of each record in the funding request to **Excluded**. In addition, the status of the funding request is changed to **Canceled**.

Funding Request Type

Oracle Revenue Management and Billing allows you to define a funding request type using which you can create a funding request. It is the funding request type which helps the system to determine the following:

- The business object using which the funding request should be created in the system.
- The currency in which the funding amount should be calculated.
- The default funding adjustment type using which the A/P adjustment should be created against a credit bill on submitting the funding request.

  Note: In the **Default Funding Adjustment Type** field, you can only specify an adjustment type where the **A/P Request Type Code** field is set to **REFUND**.
- The default garnishment adjustment type using which the garnishment adjustment should be created when the amount from the credit bill is moved to the garnishment contract of the account.

  Note: In the **Default Garnishment Adjustment Type** field, you can only specify an adjustment type where the **A/P Request Type Code** field is not set to **REFUND**.
- Whether the approval is required for the funding request.
- An algorithm which helps to calculate the threshold range for a bill based on the number of payments made for the bill in the specified period.
- Whether a funding request must be processed in the deferred mode when the number of bills in the funding request exceeds the defer processing count.

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The **Funding Request Type** screen allows you to define, edit, delete, and copy a funding request type. It contains the following zones:

- Funding Request Type List on page 1665
- Funding Request Type on page 1665

Funding Request Type List

The **Funding Request Type List** zone lists the funding request types that are already defined in the system. It contains the following columns:

Column Name	Column Description
Funding Request Type	Displays the funding request type.
Description	Displays the description of the funding request type.
Edit	On clicking the **Edit** (✎) icon, the **Funding Request Type** screen appears where you can edit the details of the funding request type.
Duplicate	On clicking the **Duplicate** (⧉) icon, the **Funding Request Type** screen appears where you can define a new funding request type using an existing funding request type.
Delete	On clicking the **Delete** (🗑) icon, you can delete the funding request type.
	Note: You can delete a funding request type when you have not created a funding request using the funding request type.

On clicking the **Broadcast** (📡) icon corresponding to a funding request type, the **Funding Request Type** zone appears with the details of the respective funding request type.

Related Topics

For more information on...	See...
How to edit a funding request type	Editing a Funding Request Type on page 1675
How to copy a funding request type	Copying a Funding Request Type on page 1682
How to delete a funding request type	Deleting a Funding Request Type on page 1682
How to view the details of a funding request type	Viewing the Funding Request Type Details on page 1689

Funding Request Type

The **Funding Request Type** zone displays the details of the funding request type. It contains of the following sections:

- **Main** - Displays the basic information about the funding request type. It contains the following fields:

Field Name	Field Description
Funding Request Type	Displays the funding request type.
Description	Displays the description of the funding request type.
Funding Request Business Object	Indicates the business object that will be used to create the funding request. In addition, a context menu appears corresponding to this field which helps in navigating to other screens in the application.

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Field Name	Field Description
	Note: It has a link. On clicking the link, the **Business Object** screen appears where you can view the details of the respective business object.
Detailed Description	Displays additional information about the funding request type.
Status	Indicates the status of the funding request type. The valid values are: • Active • Inactive
Funding Amount Currency	Indicates the currency in which the total debit and credit amount should be calculated in the funding request. The total debit and credit amount appears in the **Statistics** section of the **Funding Request** zone.
Account Funding Currency Characteristic Type	Indicates the characteristic type which should be defined on the account. This characteristic indicates that the funding amount of the account's bills should be converted in the specified currency.
Default Funding Adjustment Type	Indicates the adjustment type using which the funding adjustments must be created. **Note:** It has a link. On clicking the link, the **Adjustment Type** screen appears where you can view the details of the respective adjustment type.
Default Garnishment Adjustment Type	Indicates the garnishment adjustment type using which the garnishment adjustments must be created. **Note:** It has a link. On clicking the link, the **Adjustment Type** screen appears with the details of the respective adjustment type.
Threshold Range Algorithm	Indicates the threshold range for a bill based on the payments done for the bill. **Note:** It has a link. On clicking the link, the **Algorithm** screen appears where you can view the details of the respective algorithm.
Defer Processing Count	Displays the number of bills to determine if the funding request will be processed in deferred mode. **Note:** If the number of bills is less than the **Defer Processing Count**, the funding request will be processed in real time (i.e. immediately).
Approval Required	Indicates whether approval is required while creating the funding adjustments using the funding request type.
Approval Profile	Indicates the approval profile which must be used to define approval hierarchy for the funding request type. **Note:** The **Approval Profile** field appears when the **Approval Required** check box is selected. It has a link. On clicking the link, the **Approval Profile** screen appears where you can view the details of the respective approval profile.

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Field Name	Field Description
Submitter To Do Type	Indicates the To Do type for the submitter when the funding request type is resubmitted by the approver. **Note:** The **Submitter To Do Type** field appears when the **Approval Required** check box is selected. It has a link. On clicking the link, the **To Do Type** screen appears where you can view the details of the respective To Do type.
Submitter To Do Role	Indicates the To Do role for the submitter when the funding request type is resubmitted by the approver. **Note:** The **Submitter To Do Role** field appears when the **Approval Required** check box is selected. It has a link. On clicking the link, the **To Do Role** screen appears where you can view the details of the respective To Do role.
Currency Conversion Adjustment Algorithm	Indicates the currency conversion algorithm. It is used while determining the approval hierarchy for a funding request when the sum total of the debit and credit amount (i.e. which is in credit) is different from the installation options currency.
Currency Conversion Payment Algorithm	Indicates the currency conversion algorithm. It is used while determining the approval hierarchy for a funding request when the sum total of the debit and credit amount (i.e. which is in debit) is different from the installation options currency.

- **Characteristics** - The **Characteristics** section lists the characteristics of the funding request type. It contains the following columns:

Column Name	Column Description
Characteristic Type	Indicates the characteristic type.
Characteristic Value	Displays the value of the characteristic type.

- **Record Actions** - The **Record Actions** section contains the following buttons:

Button Name	Button Description
Edit	Used to edit the details of the funding request type.
Delete	Used to delete the funding request type. **Note:** You can delete a funding request type when you have not created a funding request using the funding request type.
Duplicate	Used to create a new funding request type using an existing funding request type.

- **Record Information** - The **Record Information** section contains the following fields:

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Field Name	Field Description
Business Object	Indicates the business object using which the funding request type is created. In addition, a context menu appears corresponding to this field which helps in navigating to other screens in the application.
	Note: It has a link. On clicking the link, the **Business Object** screen appears where you can view the details of the respective business object.

By default, the **Funding Request Type** zone does not appear in the **Funding Request Type** screen. It appears when you click the **Broadcast** (📡) icon corresponding to the funding request type in the **Funding Request Type List** zone.

Related Topics

For more information on...	See...
How to define a funding request type	Defining a Characteristic for a Funding Request Type on page 1674
How to edit a funding request type	Editing a Funding Request Type on page 1675
How to copy a funding request type	Copying a Funding Request Type on page 1682
How to delete a funding request type	Deleting a Funding Request Type on page 1682
How to view the details of a funding request type	Viewing the Funding Request Type Details on page 1689

Defining a Funding Request Type

Prerequisites

To define a funding request type, you should have:

- Funding request type business objects defined in the application
- Funding request business objects defined in the application
- Currencies defined in the application
- Funding adjustment types defined in the application (where the **A/P Request Type Code** field is set to **REFUND**)
- Garnishment adjustment types defined in the application (where the **A/P Request Type Code** field is not set to **REFUND**)
- A threshold range algorithm defined using the **C1-FDRTTR** algorithm type
- Required approval profiles defined in the application
- A To Do role assigned to the **C1-FNDSB** To Do type in the application
- Funding currency characteristic type defined in the application (where the characteristic entity is set to **Account**)
- A currency conversion algorithm defined for payments and adjustments using the **C1_CURALGPY** and **C1_CURALGAD** algorithm type, respectively

Procedure

To define a funding request type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **F** and then click **Funding Request Type**.
   A sub-menu appears.
3. Click the **Add** option from the **Funding Request Type** sub-menu.

   The **Select Business Object** screen appears. It contains the following field:

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Field Name	Field Description	Mandatory (Yes or No)
Funding Request Type Business Object	Used to indicate the business object using which you want to create the funding request type.	Yes

Tip: Alternatively, you can access the **Select Business Object** screen by clicking the **Add** button in the **Page Title** area of the **Funding Request Type** screen.

Note: The **Select Business Object** screen appears when there are multiple funding request type business objects defined in the application. If there is only one funding request type business object defined in the application, the **Funding Request Type** screen appears.

4. Select the required funding request type business object from the respective field.
5. Click **OK**.

The **Funding Request Type** screen appears. It contains the following sections:

- **Main** - Used to specify basic details about the funding request type.
- **Characteristics** - Used to define the characteristics for the funding request type.

The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Funding Request Type	Used to specify the funding request type.	Yes
Business Object	Indicates the business object using which you are defining the funding request type.	Not applicable
Description	Used to specify the description for the funding request type.	Yes
Funding Request Business Object	Used to indicate the business object using which you want to create the funding request.	Yes
Detailed Description	Used to specify additional information about the funding request type.	No
Status	Used to indicate the status of the funding request type. The valid values are: • Active • Inactive **Note:** You cannot change the status of a funding request type to **Inactive** when the corresponding funding request is in a status other than **Processed** or **Rejected**.	Yes
Funding Amount Currency	Used to indicate the currency in which the total debit and credit amount should be calculated in the funding request. The total debit and credit amount appears in the **Statistics** section of the **Funding Request** zone.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The list includes only those currencies which are defined in the system. If the currency specified in this field is different from the bill's currency, the system does currency conversion before calculating the total debit and credit amount in the funding request. The total debit amount is the sum of funding amount of all bills whose funding amount is in debit. However, the total credit amount is the sum of funding amount and garnishment amount of all bills whose funding amount is in credit. While calculating the total debit amount, the system uses the currency conversion algorithm attached to the **Currency Conversion For Payments** algorithm spot of the account's division. However, while calculating the total credit amount, the system uses the currency conversion algorithm attached to the **Currency Conversion For Adjustments** algorithm spot of the account's division.	
Account Funding Currency Characteristic Type	Used to indicate the characteristic type. This characteristic should be defined on the account. This characteristic indicates that the funding amount of the account's bills should be converted in the specified currency.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The **Search** (🔍) icon appears corresponding to the **Account Funding Currency Characteristic Type** field. On clicking the **Search** icon, the **Characteristic Type Search** window appears. You must specify a characteristic type where the characteristic entity is set to **Account**. The converted amount appears in the **Funding Currency Amount** column of the **Selected Bills** zone in the **Funding Request** screen. If the funding amount is in debit, the system uses the currency conversion algorithm attached to the **Currency Conversion For Payments** algorithm spot of the account's division. However, if the funding amount is in credit, the system uses the currency conversion algorithm attached to the **Currency Conversion For Adjustments** algorithm spot of the account's division.	
Default Funding Adjustment Type	Used to indicate the adjustment type using which the A/P adjustment should be created against a credit bill on submitting the funding request. **Note:** The **Search** (🔍) icon appears corresponding to the **Default Funding Adjustment Type** field. On clicking the **Search** icon, the **Adjustment Type Search** window appears. In the **Default Funding Adjustment Type** field, you can only specify an adjustment type where the **A/P Request Type Code** field is set to **REFUND**.	Yes
Default Garnishment Adjustment Type	Used to indicate the adjustment type using which the garnishment adjustment should be created when the amount from the credit bill is transferred to the garnishment contract of the account.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The **Search** (🔍) icon appears corresponding to the **Default Garnishment Adjustment Type** field. On clicking the **Search** icon, the **Adjustment Type Search** window appears. In the **Default Garnishment Adjustment Type** field, you can only specify an adjustment type where the **A/P Request Type Code** field is not set to **REFUND**.	
Threshold Range Algorithm	Used to attach an algorithm which helps to calculate the threshold range for a bill based on the number of payments made for the bill in the specified period. **Note:** You must specify an algorithm which is created using the **C1-FDRTTR** algorithm type in the **Threshold Range Algorithm** field. The **Search** (🔍) icon appears corresponding to the **Threshold Range Algorithm** field. On clicking the **Search** icon, the **Algorithm Search** window appears.	No
Defer Processing Count	Used to indicate whether a funding request must be processed in the deferred mode (i.e. in the background) when the number of bills in the funding request exceeds the defer processing count. **Note:** You cannot specify a negative value in the **Defer Processing Count** field. Deferred mode means in the background when the **Funding Request Periodic Monitor (C1-FNDRQ)** batch is invoked. You can configure the **Funding Request Periodic Monitor (C1-FNDRQ)** batch such that it is executed at regular intervals. For more information about the **Funding Request Periodic Monitor (C1-FNDRQ)** batch, refer to *Oracle Revenue Management and Billing Batch Guide*. If the number of bills in a funding request does not exceed the defer processing count, the system will process the funding request in real time (i.e. immediately).	No

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Field Name	Field Description	Mandatory (Yes or No)
Approval Required	Used to indicate whether the approval is required before creating payments for debit bills and A/P adjustments for credit bills through the funding request.	No
Approval Profile	Used to indicate the approval profile using which the system should determine the debit or credit hierarchy level from where the approval is required. The system considers the debit or credit hierarchy level where the funding amount of the debit or credit bill falls within the threshold limit. **Note:** This field appears when the **Approval Required** option is selected.	Yes (Conditional) **Note:** This field is required when the **Approval Required** option is selected.
Submitter To Do Type	Used to indicate that To Do entry of the specified To Do type must be created when the approver rejects the funding request or raises the request for resubmitting the funding request. **Note:** You must specify the **C1-FNDSB** To Do type in the **Submitter To Do Type** field. The **Search** icon appears corresponding to the **Submitter To Do Type** field. On clicking the **Search** icon, the **To Do Type Search** window appears. This field appears when the **Approval Required** option is selected.	Yes (Conditional) **Note:** This field is required when the **Approval Required** option is selected.
Submitter To Do Role	Used to indicate that the users with the specified To Do role must receive a To Do when the approver rejects the funding request or raises the request for resubmitting the funding request. **Note:** This field appears when the **Approval Required** option is selected. The list includes only those To Do roles which are associated to the specified submitter To Do type.	Yes (Conditional) **Note:** This field is required when the **Approval Required** option is selected.
Currency Conversion Adjustment Algorithm	Used to indicate the currency conversion algorithm. It is used while determining the approval hierarchy for a funding request	Yes (Conditional)

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Field Name	Field Description	Mandatory (Yes or No)
	when the sum total of the debit and credit amount (i.e. which is in credit) is different from the installation options currency. **Note:** This field appears when the **Approval Required** option is selected. The **Search** (🔍) icon appears corresponding to the **Currency Conversion Adjustment Algorithm** field. On clicking the **Search** icon, the **Algorithm Search** window appears.	**Note:** This field is required when the **Currency Conversion Required** option is selected in the approval profile.
Currency Conversion Payment Algorithm	Used to indicate the currency conversion algorithm. It is used while determining the approval hierarchy for a funding request when the sum total of the debit and credit amount (i.e. which is in debit) is different from the installation options currency. **Note:** This field appears when the **Approval Required** option is selected. The **Search** (🔍) icon appears corresponding to the **Currency Conversion Payment Algorithm** field. On clicking the **Search** icon, the **Algorithm Search** window appears.	Yes (Conditional) **Note:** This field is required when the **Currency Conversion Required** option is selected in the approval profile.

6. Enter the required details in the **Main** section.
7. Define characteristics for the funding request type, if required.
8. Click **Save**.
   The funding request type is defined.

Related Topics

For more information on...	See...
Funding Request Type screen	Funding Request Type on page 1664
How to define a characteristic for a funding request type	Defining a Characteristic for a Funding Request Type on page 1674

Defining a Characteristic for a Funding Request Type

Prerequisites

To define a characteristic for a funding request type, you should have:

- Characteristic types defined in the application (where the characteristic entity is set to **Funding Request Type**)

Procedure

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To define a characteristic for a funding request type:

1. Ensure that the **Characteristics** section is expanded when you are defining, editing, or copying a funding *r*equest type.

   The **Characteristics** section contains the following fields in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Characteristic Type	Used to indicate the characteristic type. **Note:** The list includes only those characteristic types where the characteristic entity is set to **Funding Request Type**.	Yes (Conditional) **Note:** This field is required when you are defining a characteristic for the funding request type.
Characteristic Value	Used to specify the value for the characteristic type. **Note:** If you select a predefined characteristic type, the **Search** (🔍) icon appears corresponding to the **Characteristic Value** field. On clicking the **Search** icon, you can search for a predefined characteristic value. On specifying the value for a predefined characteristic type, the description of the characteristic value appears corresponding to the **Characteristic Value** field.	Yes (Conditional) **Note:** This field is required when you are defining a characteristic for the funding request type.

2. Enter the required details in the **Characteristics** section.
3. If you want to define more than one characteristic for the funding request type, click the **Add** (+) icon and *t*hen repeat step *2*.

> **Note:** However, if you want to remove a characteristic from the funding request type, click the **Delete** (🗑) icon corresponding to the characteristic.

Related Topics

For more information on...	See...
How to define a funding request type	Defining a Funding Request Type on page 1668
How to edit a funding request type	Editing a Funding Request Type on page 1675
How to copy a funding request type	Copying a Funding Request Type on page 1682

Editing a Funding Request Type

Prerequisites

To edit a funding request type, you should have:

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- Funding request business objects defined in the application
- Currencies defined in the application
- Funding adjustment types defined in the application (where the **A/P Request Type Code** field is set to **REFUND**)
- Garnishment adjustment types defined in the application (where the **A/P Request Type Code** field is not set to **REFUND**)
- A threshold range algorithm defined using the **C1-FDRTTR** algorithm type
- Required approval profiles defined in the application
- A To Do role assigned to the **C1-FNDSB** To Do type in the application
- Funding currency characteristic type defined in the application (where the characteristic entity is set to **Account**)
- A currency conversion algorithm defined for payments and adjustments using the **C1_CURALGPY** and **C1_CURALGAD** algorithm type, respectively

Procedure

To edit a funding request type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **F** and then click **Funding Request Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Funding Request Type** sub-menu.
   The **Funding Request Type** screen appears.
4. In the **Funding Request Type List** zone, click the **Edit** (✎) icon in the **Edit** column corresponding to the *f*unding request type whose details you want to edit.

   The **Funding Request Type** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details about the funding request type.
   - **Characteristics** - Used to define the characteristics for the funding request type.

   The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Funding Request Type	Displays the funding request type.	Not applicable
Business Object	Indicates the business object using which you are defining the funding request type.	Not applicable
Description	Used to specify the description for the funding request type.	Yes
Funding Request Business Object	Used to indicate the business object using which you want to create the funding request.	Yes
Detailed Description	Used to specify additional information about the funding request type.	No
Status	Used to indicate the status of the funding request type. The valid values are: • Active • Inactive **Note:** You cannot change the status of a funding request type to **Inactive** when the corresponding funding request is in a status other than **Processed** or **Rejected**.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
Funding Amount Currency	Used to indicate the currency in which the total debit and credit amount should be calculated in the funding request. The total debit and credit amount appears in the **Statistics** section of the **Funding Request** zone. **Note:** The list includes only those currencies which are defined in the system. If the currency specified in this field is different from the bill's currency, the system does currency conversion before calculating the total debit and credit amount in the funding request. The total debit amount is the sum of funding amount of all bills whose funding amount is in debit. However, the total credit amount is the sum of funding amount and garnishment amount of all bills whose funding amount is in credit. While calculating the total debit amount, the system uses the currency conversion algorithm attached to the **Currency Conversion For Payments** algorithm spot of the account's division. However, while calculating the total credit amount, the system uses the currency conversion algorithm attached to the **Currency Conversion For Adjustments** algorithm spot of the account's division.	Yes
Account Funding Currency Characteristic Type	Used to indicate the characteristic type. This characteristic should be defined on the account. This characteristic indicates that the funding amount of the account's bills should be converted in the specified currency.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The **Search** (🔍) icon appears corresponding to the **Account Funding Currency Characteristic Type** field. On clicking the **Search** icon, the **Characteristic Type Search** window appears. You must specify a characteristic type where the characteristic entity is set to **Account**. The converted amount appears in the **Funding Currency Amount** column of the **Selected Bills** zone in the **Funding Request** screen. If the funding amount is in debit, the system uses the currency conversion algorithm attached to the **Currency Conversion For Payments** algorithm spot of the account's division. However, if the funding amount is in credit, the system uses the currency conversion algorithm attached to the **Currency Conversion For Adjustments** algorithm spot of the account's division.	
Default Funding Adjustment Type	Used to indicate the adjustment type using which the A/P adjustment should be created against a credit bill on submitting the funding request. **Note:** The **Search** (🔍) icon appears corresponding to the **Default Funding Adjustment Type** field. On clicking the **Search** icon, the **Adjustment Type Search** window appears. In the **Default Funding Adjustment Type** field, you can only specify an adjustment type where the **A/P Request Type Code** field is set to **REFUND**.	Yes
Default Garnishment Adjustment Type	Used to indicate the adjustment type using which the garnishment adjustment should be created when the amount from the credit bill is transferred to the garnishment contract of the account.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The **Search** (🔍) icon appears corresponding to the **Default Garnishment Adjustment Type** field. On clicking the **Search** icon, the **Adjustment Type Search** window appears. In the **Default Garnishment Adjustment Type** field, you can only specify an adjustment type where the **A/P Request Type Code** field is not set to **REFUND**.	
Threshold Range Algorithm	Used to attach an algorithm which helps to calculate the threshold range for a bill based on the number of payments made for the bill in the specified period. **Note:** You must specify an algorithm which is created using the **C1-FDRTTR** algorithm type in the **Threshold Range Algorithm** field. The **Search** (🔍) icon appears corresponding to the **Threshold Range Algorithm** field. On clicking the **Search** icon, the **Algorithm Search** window appears.	No
Defer Processing Count	Used to indicate whether a funding request must be processed in the deferred mode (i.e. in the background) when the number of bills in the funding request exceeds the defer processing count. **Note:** You cannot specify a negative value in the **Defer Processing Count** field. Deferred mode means in the background when the **Funding Request Periodic Monitor (C1-FNDRQ)** batch is invoked. You can configure the **Funding Request Periodic Monitor (C1-FNDRQ)** batch such that it is executed at regular intervals. For more information about the **Funding Request Periodic Monitor (C1-FNDRQ)** batch, refer to *Oracle Revenue Management and Billing Batch Guide*. If the number of bills in a funding request does not exceed the defer processing count, the system will process the funding request in real time (i.e. immediately).	No

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Field Name	Field Description	Mandatory (Yes or No)
Approval Required	Used to indicate whether the approval is required before creating payments for debit bills and A/P adjustments for credit bills through the funding request.	No
Approval Profile	Used to indicate the approval profile using which the system should determine the debit or credit hierarchy level from where the approval is required. The system considers the debit or credit hierarchy level where the funding amount of the debit or credit bill falls within the threshold limit. **Note:** This field appears when the **Approval Required** option is selected.	Yes (Conditional) **Note:** This field is required when the **Approval Required** option is selected.
Submitter To Do Type	Used to indicate that To Do entry of the specified To Do type must be created when the approver rejects the funding request or raises the request for resubmitting the funding request. **Note:** You must specify the **C1-FNDSB** To Do type in the **Submitter To Do Type** field. The **Search** icon appears corresponding to the **Submitter To Do Type** field. On clicking the **Search** icon, the **To Do Type Search** window appears. This field appears when the **Approval Required** option is selected.	Yes (Conditional) **Note:** This field is required when the **Approval Required** option is selected.
Submitter To Do Role	Used to indicate that the users with the specified To Do role must receive a To Do when the approver rejects the funding request or raises the request for resubmitting the funding request. **Note:** This field appears when the **Approval Required** option is selected. The list includes only those To Do roles which are associated to the specified submitter To Do type.	Yes (Conditional) **Note:** This field is required when the **Approval Required** option is selected.
Currency Conversion Adjustment Algorithm	Used to indicate the currency conversion algorithm. It is used while determining the approval hierarchy for a funding request	Yes (Conditional)

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Field Name	Field Description	Mandatory (Yes or No)
	when the sum total of the debit and credit amount (i.e. which is in credit) is different from the installation options currency. **Note:** This field appears when the **Approval Required** option is selected. The **Search** (🔍) icon appears corresponding to the **Currency Conversion Adjustment Algorithm** field. On clicking the **Search** icon, the **Algorithm Search** window appears.	**Note:** This field is required when the **Currency Conversion Required** option is selected in the approval profile.
Currency Conversion Payment Algorithm	Used to indicate the currency conversion algorithm. It is used while determining the approval hierarchy for a funding request when the sum total of the debit and credit amount (i.e. which is in debit) is different from the installation options currency. **Note:** This field appears when the **Approval Required** option is selected. The **Search** (🔍) icon appears corresponding to the **Currency Conversion Payment Algorithm** field. On clicking the **Search** icon, the **Algorithm Search** window appears.	Yes (Conditional) **Note:** This field is required when the **Currency Conversion Required** option is selected in the approval profile.

Tip: Alternatively, you can edit the details of a funding request type by clicking the **Edit** button in the **Funding Request Type** zone.

5. Modify the details in the **Main** section, if required.
6. Define, edit, or remove characteristics of the funding request type, if required.
7. Click **Save**.
   The changes made to the funding request type are saved.

Related Topics

For more information on...	See...
Funding Request Type screen	Funding Request Type on page 1664
Funding Request Type List zone	Funding Request Type List on page 1665
Funding Request Type zone	Funding Request Type on page 1665
How to define a characteristic for a funding request type	Defining a Characteristic for a Funding Request Type on page 1674

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Deleting a Funding Request Type

Procedure

To delete a funding request type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **F** and then click **Funding Request Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Funding Request Type** sub-menu.
   The **Funding Request Type** screen appears.
4. In the **Funding Request Type List** zone, click the **Delete** (🗑) icon in the **Delete** column corresponding to the *f*unding request type that you want to delete.

   A message appears confirming whether you want to delete the funding request type.

   Note: You can delete a funding request type when you have not created a funding request using the funding request type.

   Tip: Alternatively, you can delete a funding request type by clicking the **Delete** button in the **Funding Request Type** zone.
5. Click **OK**.
   The funding request type is deleted.

Related Topics

For more information on...	See...
Funding Request Type screen	Funding Request Type on page 1664
Funding Request Type List zone	Funding Request Type List on page 1665
Funding Request Type zone	Funding Request Type on page 1665

Copying a Funding Request Type

Instead of creating a funding request type from scratch, you can create a new funding request type using an existing funding request type. This is possible through copying a funding request type. On copying a funding request type, the details including the characteristics are copied to the new funding request type. You can then edit the details, if required.

Prerequisites

To copy a funding request type, you should have:

- Funding request type (whose copy you want to create) defined in the application
- Funding request business objects defined in the application
- Currencies defined in the application
- Funding adjustment types defined in the application (where the **A/P Request Type Code** field is set to **REFUND**)
- Garnishment adjustment types defined in the application (where the **A/P Request Type Code** field is not set to **REFUND**)
- A threshold range algorithm defined using the **C1-FDRTTR** algorithm type
- Required approval profiles defined in the application
- A To Do role assigned to the **C1-FNDSB** To Do type in the application
- Funding currency characteristic type defined in the application (where the characteristic entity is set to **Account**)

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- A currency conversion algorithm defined for payments and adjustments using the **C1_CURALGPY** and **C1_CURALGAD** algorithm type, respectively

Procedure

To copy a funding request type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **F** and then click **Funding Request Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Funding Request Type** sub-menu.
   The **Funding Request Type** screen appears.
4. In the **Funding Request Type List** zone, click the **Duplicate** (⧉) icon in the **Duplicate** column *c*orresponding to the funding request type whose copy you want to create.

   The **Funding Request Type** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details about the funding request type.
   - **Characteristics** - Used to define the characteristics for the funding request type.

   The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Funding Request Type	Used to specify the funding request type.	Yes
Business Object	Indicates the business object using which you are defining the funding request type.	Not applicable
Description	Used to specify the description for the funding request type.	Yes
Funding Request Business Object	Used to indicate the business object using which you want to create the funding request.	Yes
Detailed Description	Used to specify additional information about the funding request type.	No
Status	Used to indicate the status of the funding request type. The valid values are: • Active • Inactive **Note:** You cannot change the status of a funding request type to **Inactive** when the corresponding funding request is in a status other than **Processed** or **Rejected**.	Yes
Funding Amount Currency	Used to indicate the currency in which the total debit and credit amount should be calculated in the funding request. The total debit and credit amount appears in the **Statistics** section of the **Funding Request** zone.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The list includes only those currencies which are defined in the system. If the currency specified in this field is different from the bill's currency, the system does currency conversion before calculating the total debit and credit amount in the funding request. The total debit amount is the sum of funding amount of all bills whose funding amount is in debit. However, the total credit amount is the sum of funding amount and garnishment amount of all bills whose funding amount is in credit. While calculating the total debit amount, the system uses the currency conversion algorithm attached to the **Currency Conversion For Payments** algorithm spot of the account's division. However, while calculating the total credit amount, the system uses the currency conversion algorithm attached to the **Currency Conversion For Adjustments** algorithm spot of the account's division.	
Account Funding Currency Characteristic Type	Used to indicate the characteristic type. This characteristic should be defined on the account. This characteristic indicates that the funding amount of the account's bills should be converted in the specified currency.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The **Search** (🔍) icon appears corresponding to the **Account Funding Currency Characteristic Type** field. On clicking the **Search** icon, the **Characteristic Type Search** window appears. You must specify a characteristic type where the characteristic entity is set to **Account**. The converted amount appears in the **Funding Currency Amount** column of the **Selected Bills** zone in the **Funding Request** screen. If the funding amount is in debit, the system uses the currency conversion algorithm attached to the **Currency Conversion For Payments** algorithm spot of the account's division. However, if the funding amount is in credit, the system uses the currency conversion algorithm attached to the **Currency Conversion For Adjustments** algorithm spot of the account's division.	
Default Funding Adjustment Type	Used to indicate the adjustment type using which the A/P adjustment should be created against a credit bill on submitting the funding request. **Note:** The **Search** (🔍) icon appears corresponding to the **Default Funding Adjustment Type** field. On clicking the **Search** icon, the **Adjustment Type Search** window appears. In the **Default Funding Adjustment Type** field, you can only specify an adjustment type where the **A/P Request Type Code** field is set to **REFUND**.	Yes
Default Garnishment Adjustment Type	Used to indicate the adjustment type using which the garnishment adjustment should be created when the amount from the credit bill is transferred to the garnishment contract of the account.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The **Search** (🔍) icon appears corresponding to the **Default Garnishment Adjustment Type** field. On clicking the **Search** icon, the **Adjustment Type Search** window appears. In the **Default Garnishment Adjustment Type** field, you can only specify an adjustment type where the **A/P Request Type Code** field is not set to **REFUND**.	
Threshold Range Algorithm	Used to attach an algorithm which helps to calculate the threshold range for a bill based on the number of payments made for the bill in the specified period. **Note:** You must specify an algorithm which is created using the **C1-FDRTTR** algorithm type in the **Threshold Range Algorithm** field. The **Search** (🔍) icon appears corresponding to the **Threshold Range Algorithm** field. On clicking the **Search** icon, the **Algorithm Search** window appears.	No
Defer Processing Count	Used to indicate whether a funding request must be processed in the deferred mode (i.e. in the background) when the number of bills in the funding request exceeds the defer processing count. **Note:** You cannot specify a negative value in the **Defer Processing Count** field. Deferred mode means in the background when the **Funding Request Periodic Monitor (C1-FNDRQ)** batch is invoked. You can configure the **Funding Request Periodic Monitor (C1-FNDRQ)** batch such that it is executed at regular intervals. For more information about the **Funding Request Periodic Monitor (C1-FNDRQ)** batch, refer to *Oracle Revenue Management and Billing Batch Guide*. If the number of bills in a funding request does not exceed the defer processing count, the system will process the funding request in real time (i.e. immediately).	No

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Field Name	Field Description	Mandatory (Yes or No)
Approval Required	Used to indicate whether the approval is required before creating payments for debit bills and A/P adjustments for credit bills through the funding request.	No
Approval Profile	Used to indicate the approval profile using which the system should determine the debit or credit hierarchy level from where the approval is required. The system considers the debit or credit hierarchy level where the funding amount of the debit or credit bill falls within the threshold limit. **Note:** This field appears when the **Approval Required** option is selected.	Yes (Conditional) **Note:** This field is required when the **Approval Required** option is selected.
Submitter To Do Type	Used to indicate that To Do entry of the specified To Do type must be created when the approver rejects the funding request or raises the request for resubmitting the funding request. **Note:** You must specify the **C1-FNDSB** To Do type in the **Submitter To Do Type** field. The **Search** (🔍) icon appears corresponding to the **Submitter To Do Type** field. On clicking the **Search** icon, the **To Do Type Search** window appears. This field appears when the **Approval Required** option is selected.	Yes (Conditional) **Note:** This field is required when the **Approval Required** option is selected.
Submitter To Do Role	Used to indicate that the users with the specified To Do role must receive a To Do when the approver rejects the funding request or raises the request for resubmitting the funding request. **Note:** This field appears when the **Approval Required** option is selected. The list includes only those To Do roles which are associated to the specified submitter To Do type.	Yes (Conditional) **Note:** This field is required when the **Approval Required** option is selected.
Currency Conversion Adjustment Algorithm	Used to indicate the currency conversion algorithm. It is used while determining the approval hierarchy for a funding request	Yes (Conditional)

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Field Name	Field Description	Mandatory (Yes or No)
	when the sum total of the debit and credit amount (i.e. which is in credit) is different from the installation options currency. **Note:** This field appears when the **Approval Required** option is selected. The **Search** (🔍) icon appears corresponding to the **Currency Conversion Adjustment Algorithm** field. On clicking the **Search** icon, the **Algorithm Search** window appears.	**Note:** This field is required when the **Currency Conversion Required** option is selected in the approval profile.
Currency Conversion Payment Algorithm	Used to indicate the currency conversion algorithm. It is used while determining the approval hierarchy for a funding request when the sum total of the debit and credit amount (i.e. which is in debit) is different from the installation options currency. **Note:** This field appears when the **Approval Required** option is selected. The **Search** (🔍) icon appears corresponding to the **Currency Conversion Payment Algorithm** field. On clicking the **Search** icon, the **Algorithm Search** window appears.	Yes (Conditional) **Note:** This field is required when the **Currency Conversion Required** option is selected in the approval profile.

Tip: Alternatively, you can copy a funding request type by clicking the **Duplicate** button in the **Funding Request Type** zone.

5. Enter the required details in the **Main** section.
6. Define, edit, or remove characteristics of the funding request type, if required.
7. Click **Save**.
   The new funding request type is defined.

Related Topics

For more information on...	See...
Funding Request Type screen	Funding Request Type on page 1664
Funding Request Type List zone	Funding Request Type List on page 1665
Funding Request Type zone	Funding Request Type on page 1665
How to define a characteristic for a funding request type	Defining a Characteristic for a Funding Request Type on page 1674

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Viewing the Funding Request Type Details

Procedure

To view the details of a funding request type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **F** and then click **Funding Request Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Funding Request Type** sub-menu.
   The **Funding Request Type** screen appears.
4. In the **Funding Request Type List** zone, click the **Broadcast** (📡) icon corresponding to the funding request *t*ype whose details you want to view.
   The **Funding Request Type** zone appears.
5. View the details of the funding request type in the **Funding Request Type** zone.

Related Topics

For more information on...	See...
Funding Request Type screen	Funding Request Type on page 1664
Funding Request Type List zone	Funding Request Type List on page 1665
Funding Request Type zone	Funding Request Type on page 1665

Funding Request (Used for Searching)

The **Funding Request** screen allows you to search for a funding request using various search criteria. It also allows you to create a funding request. It contains the following zone:

- Search Funding Request on page 1689

Through this screen, you can navigate to the following screen:

- Funding Request (Used for Viewing) on page 1694

Search Funding Request

The **Search Funding Request** zone allows you to search for a funding request using various search criteria. It contains the following two sections:

- **Search Criteria** - The **Search Criteria** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Search By	Used to indicate whether you want to search for a funding request using the funding request or bill details. The valid values are: • Request Details • Bill Details	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	Note: By default, the **Request Details** option is selected.	
Created From	Used to search funding requests which are created from a particular date onwards. **Note:** This field appears when the **Request Details** option is selected from the **Search By** list.	No
Status	Used to search funding requests with a particular status. The valid values are: • Approval In Progress • Deferred Processing • Draft • Processed • Rejected **Note:** This field appears when the **Request Details** option is selected from the **Search By** list.	No
Created To	Used to search funding requests which are created till a particular date. **Note:** This field appears when the **Request Details** option is selected from the **Search By** list.	No
User ID	Used to search funding requests which are created by a particular user. **Note:** This field appears when the **Request Details** option is selected from the **Search By** list.	No
Funding Request Type	Used to search funding requests which are created using a particular funding request type. **Note:** This field appears when the **Request Details** option is selected from the **Search By** list.	No
Person Name	Used to search funding requests which includes bills of a particular person. **Note:** This field appears when the **Request Details** option is selected from the **Search By** list.	No
Funding Request ID	Used to search a particular funding request. **Note:** This field appears when the **Request Details** option is selected from the **Search By** list.	No
Creation Mode	Used to search funding requests which are created in a particular mode. The valid values are: • Automatic	No

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Field Name	Field Description	Mandatory (Yes or No)
	• Manual **Note:** This field appears when the **Request Details** option is selected from the **Search By** list.	
Bill ID	Used to search funding requests which include a particular bill. **Note:** This field appears when the **Bill Details** option is selected from the **Search By** list. The **Search** (🔍) icon appears corresponding to the **Bill ID** field. On clicking the **Search** icon, the **Bill Search** window appears.	No
Bill Date From	Used to search funding requests which include bills that are created from a particular date onwards. **Note:** This field appears when the **Bill Details** option is selected from the **Search By** list.	No
Alternate Bill ID	Used to search funding requests which include a particular bill. **Note:** This field appears when the **Bill Details** option is selected from the **Search By** list.	No
Bill Date To	Used to search funding requests which include bills that are created till a particular date. **Note:** This field appears when the **Bill Details** option is selected from the **Search By** list.	No
Division	Used to search funding requests which includes bills of accounts which belong to a particular division. **Note:** This field appears when the **Bill Details** option is selected from the **Search By** list. You can only view those divisions to which you have access in the **Division** list.	No

Note: You must specify at least one search criterion while searching for a funding request.

- **Search Results** - On clicking the **Search** button, the search results appear based on the specified search criteria. The **Search Results** section contains the following columns:

Column Name	Column Description
Create Date Time	Displays the date and time when the funding request is created.

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Column Name	Column Description
Funding Request Information	Displays information about the funding request. **Note:** It has a link. On clicking the link, the **Funding Request** screen appears where you can view the details of the respective funding request.
Status	Indicates the status of the funding request. The valid values are: • Approval In Progress • Deferred Processing • Draft • Processed • Rejected
Total Debit Amount	Displays the total amount of the debit bills which are added in the funding request.
Total Credit Amount	Displays the total amount of the credit bills which are added in the funding request.
Created By	Indicates the user who has created the funding request.
Creation Mode	Indicates how the funding request is created. The valid values are: • Automatic • Manual

Note: Pagination is used to display limited number of records in the **Search Results** section. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

Related Topics

For more information on...	See...
How to search for a funding request	Searching for a Funding Request on page 1692

Searching for a Funding Request

Prerequisites

To search for a funding request, you should have:

- Funding request types defined in the application

Procedure

To search for a funding request:

1. Click the **Menu** link in the **Application** toolbar.
   A list appears.
2. From the **Main** menu, select **Accounting and Receivable** and then click **Funding Request**.
   A sub-menu appears.
3. Click the **Search** option from the **Funding Request** sub-menu.
   The **Funding Request** screen appears.
4. Enter the search criteria in the **Search Funding Request** zone.

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> **Note:** ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.

5. Click **Search**.
   A list of funding requests that meet the search criteria appears in the **Search Results** section.

Related Topics

For more information on...	See...
Funding Request screen	Funding Request (Used for Searching) on page 1689
Search Funding Request zone	Search Funding Request on page 1689

Creating a Funding Request

Prerequisites

To create a funding request, you should have:

- Funding request types defined in the application

Procedure

To create a funding request:

1. Click the **Menu** link in the **Application** toolbar.
   A list appears.
2. From the **Main** menu, select **Accounting and Receivable** and then click **Funding Request**.
   A sub-menu appears.
3. Click the **Add** option from the **Funding Request** sub-menu.

   The **Add Funding Request** screen appears. It contains the following field:

Field Name	Field Description	Mandatory (Yes or No)
Funding Request Type	Used to indicate the funding request type using which you want to create the funding request.	Yes

> **Tip:** Alternatively, you can access this screen by clicking the **Add** button in the **Page Title** area of the **Funding Request** screen.

4. Select the required funding request type from the respective field.
5. Click **OK**.
   The funding request is created in the **Draft** status.

Related Topics

For more information on...	See...
Funding Request screen	Funding Request (Used for Searching) on page 1689
How to add a debit or credit bill to the funding request	Adding a Debit or Credit Bill to a Funding Request on page 1707

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For more information on...	See...
How to define a characteristic for a funding request	Defining a Characteristic for a Funding Request on page 1711

Viewing the Funding Request Details

Procedure

To view the details of a funding request:

1. Search for the funding request in the **Funding Request** screen.
2. In the **Search Results** section, click the link in the **Funding Request Information** column corresponding to *t*he funding request whose details you want to view.
   The **Funding Request** screen appears.
3. Ensure that the **Main** tab is selected.
4. View the details of the funding request in the **Funding Request** zone.
5. View the credit and/or debit bills added in the funding request in the **Selected Bills** zone.

Related Topics

For more information on...	See...
How to search for a funding request	Searching for a Funding Request on page 1692
Funding Request screen	Funding Request (Used for Viewing) on page 1694
Funding Request zone	Funding Request on page 1695
Selected Bills zone	Selected Bills on page 1702

Funding Request (Used for Viewing)

The **Funding Request** screen allows you to:

- Edit the details of a funding request
- Delete or cancel a funding request
- View the details of a funding request
- Submit a funding request for processing
- Approve or reject a funding request
- Request the submitter to resubmit a funding request for approval
- Withdraw a funding request
- View the log of a funding request
- Add a log entry for a funding request

It consists of the following tabs:

- Funding Request - Main on page 1695
- Funding Request - Bills on page 1701
- Funding Request - Log on page 1706

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Funding Request - Main

The **Main** tab displays information about the funding request. It contains the following zones:

- Funding Request on page 1695
- Search Bill on page 1698

Funding Request

The **Funding Request** zone displays the details of the funding request. It contains the following sections:

- **Main** - Displays basic information about the funding request. It contains the following fields:

Field Name	Field Description
Funding Request Information	Displays information about the funding request.
Funding Request Type	Indicates the funding request type using which the funding request is created. **Note:** It has a link. On clicking the link, the **Funding Request Type** screen appears where you can view the details of the respective funding request type.
Status	Indicates the status of the funding request. The valid values are: • Approval In Progress • Deferred Processing • Draft • Processed • Rejected
Status Reason	Indicates the reason why the funding request is rejected. **Note:** This field appears when the funding request is in the **Rejected** status. It has a link. On clicking the link, the **Status Reason** screen appears where you can view the details of the respective status reason.
Funding Adjustment Type	Indicates the adjustment type using which the A/P adjustment is created against a credit bill. **Note:** It has a link. On clicking the link, the **Adjustment Type** screen appears where you can view the details of the respective adjustment type.
Garnishment Adjustment Type	Indicates the adjustment type using which the garnishment adjustment is created when the amount from the credit bill is transferred to the garnishment contract of the account. **Note:** It has a link. On clicking the link, the **Adjustment Type** screen appears where you can view the details of the respective adjustment type.
Comments	Displays additional information entered while rejecting the funding request. **Note:** This field appears when the funding request is in the **Rejected** status.

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Field Name	Field Description
Creation Mode	Indicates whether the funding request is created automatically or manually. The valid values are: • Automatic • Manual

- **Statistics** - Displays analytical information about the funding request. It contains the following fields:

Field Name	Field Description
Total Records	Displays the total number of debit or credit bills which are added in the funding request.
Total Records Processed	Displays the total number of debit or credit bills for which payments or adjustments are successfully created in the system.
Total Records Excluded	Displays the total number of debit or credit bills which are excluded from the automatic funding request.
Total Records In Error	Displays the total number of debit or credit bills for which payments or adjustments was not successfully created in the system.
Total Payment Incoming Events Created	Displays the total number of payment events created against the debit bills in the funding request.
Total Adjustments Created	Displays the total number of adjustments created against the credit bills in the funding request.
Total Credit Funding Amount	Displays the sum of funding amount and garnishment amount of all bills whose funding amount is in credit. The sum total is calculated in the funding amount currency which is specified in the funding request type. **Note:** If the credit bill's currency is different from the funding amount currency, the system does the currency conversion before calculating the sum total. The system uses the currency conversion algorithm attached to the **Currency Conversion For Adjustments** algorithm spot of the account's division.
Total Debit Funding Amount	Displays the sum of funding amount of all bills whose funding amount is in debit. The sum total is calculated in the funding amount currency which is specified in the funding request type. **Note:** If the debit bill's currency is different from the funding amount currency, the system does the currency conversion before calculating the sum total. The system uses the currency conversion algorithm attached to the **Currency Conversion For Payments** algorithm spot of the account's division.

- **Record Actions** - This section contains the following buttons:

Button Name	Button Description
Edit	Used to edit the details of the funding request. **Note:** The **Edit** button appears when the funding request is in the **Draft** status.
Delete	Used to delete the funding request. **Note:** The **Delete** button appears when the funding request is in the **Draft** status.

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Button Name	Button Description
Submit	Used to submit the funding request. **Note:** The **Submit** button appears when the funding request is in the **Draft** status.
Cancel	Used to cancel the funding request. **Note:** The **Cancel** button appears when the funding request is in the **Draft** status.
Approve	Used to approve the funding request. **Note:** The **Approve** button appears when: • The funding request is in the **Approval In Progress** status. • A user with the approval To Do role is reviewing the funding request.
Reject	Used to reject the funding request. **Note:** The **Reject** button appears when: • The funding request is in the **Approval In Progress** status. • A user with the approval To Do role is reviewing the funding request.
Re Submit	Used to request for resubmitting the funding request. **Note:** The **Re Submit** button appears when: • The funding request is in the **Approval In Progress** status. • A user with the approval To Do role is reviewing the funding request.
Withdraw	Used to withdraw the funding request. **Note:** The **Withdraw** button appears when: • The funding request is in the **Approval In Progress** status. • A user with the submitter To Do role is viewing the funding request.

- **Record Information** - This section contains the following fields:

Field Name	Field Description
Business Object	Indicates the business object using which the funding request is created. In addition, a context menu appears corresponding to this field which helps in navigating to other screens in the application. **Note:** It has a link. On clicking the link, the **Business Object** screen appears where you can view the details of the respective business object.
Status Date/Time	Displays the date and time when the funding request status is updated
Create Date/Time	Displays the date and time when the funding request is created.

- **Characteristics** - Lists the characteristics defined for the funding request. It contains the following columns:

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Column Name	Column Description
Effective Date	Displays the date from when the characteristic is effective for the funding request.
Characteristic Type	Indicates the characteristic type.
Characteristic Value	Displays the value of the characteristic type.

Related Topics

For more information on...	See...
How to edit a funding request	Editing a Funding Request on page 1710
How to delete a funding request	Deleting a Funding Request on page 1712
How to submit a funding request	Submitting a Funding Request on page 1714
How to cancel a funding request	Cancelling a Funding Request on page 1713
How to approve a funding request	Approving a Funding Request on page 1716
How to reject a funding request	Rejecting a Funding Request on page 1717
How to request for resubmitting a funding request	Requesting to Resubmit a Funding Request on page 1719
How to withdraw a funding request	Withdrawing a Funding Request on page 1720

Search Bill

The **Search Bill** zone allows you to search for a bill using various search criteria. It appears when the funding request is in the **Draft** status and the creation mode is set to **Manual**. It contains the following two sections:

- **Search Criteria** - The **Search Criteria** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Search By	Used to indicate whether you want to search for a bill using the person, account, or bill details. The valid values are: • Bill Details • Account Details • Person Details **Note:** By default, the **Bill Details** option is selected.	Yes
Bill ID	Used to search a particular bill. **Note:** This field appears when the **Bill Details** option is selected from the **Search By** list. The **Search** (🔍) icon appears corresponding to the **Bill ID** field. On clicking the **Search** icon, the **Bill Search** window appears.	No
Bill Date From	Used to search bills which are created from a particular date onwards.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	Note: This field appears when the **Bill Details** option is selected from the **Search By** list. By default, the current date appears in this field.	
Alternate Bill ID	Used to search a particular bill. **Note:** This field appears when the **Bill Details** option is selected from the **Search By** list.	No
Bill Date To	Used to search bills which are created till a particular date. **Note:** This field appears when the **Bill Details** option is selected from the **Search By** list. By default, the current date appears in this field.	Yes
Bill Balance	Used to indicate whether you want to search bills with debit or credit balance. The valid values are: • Credit • Debit **Note:** This field appears when the **Bill Details** option is selected from the **Search By** list.	No
Bill Due Date From	Used to search bills which are due from a particular date onwards. **Note:** This field appears when the **Bill Details** option is selected from the **Search By** list.	No
Division	Used to search bills of accounts which belong to a particular division. **Note:** You can only view those divisions to which you have access in the **Division** list. This field appears when the **Bill Details** option is selected from the **Search By** list.	No
Bill Due Date To	Used to search bills which are due till a particular date. **Note:** This field appears when the **Bill Details** option is selected from the **Search By** list.	No
Account ID	Used to search bills of a particular account.	Yes (Conditional)

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Field Name	Field Description	Mandatory (Yes or No)
	Note: This field appears when the **Account Details** option is selected from the **Search By** list.	**Note:** This field is required when the **Account Details** option is selected from the **Search By** list.
Person ID	Used to search bills which belong to a particular person.	Yes (Conditional)
	Note: This field appears when the **Person Details** option is selected from the **Search By** list.	**Note:** This field is required when: • The **Person Details** option is selected from the **Search By** list. • The person name is not specified in the search criteria.
Person Name	Used to search bills which are created for accounts of a particular person.	Yes (Conditional)
	Note: This field appears when the **Person Details** option is selected from the **Search By** list.	**Note:** This field is required when: • The **Person Details** option is selected from the **Search By** list. • The person ID is not specified in the search criteria.
Country	Used to search bills of persons who reside in a particular country.	No
	Note: This field appears when the **Person Details** option is selected from the **Search By** list.	

Note: You must specify at least one search criterion while searching for a bill.

- **Search Results** - On clicking the **Search** button, the search results appear based on the specified search criteria. The **Search Results** section contains the following columns:

Column Name	Column Description
Bill Information	Displays additional information about the bill. In addition, this column has a context menu which helps in navigating to other screens in the application.
	Note: It has a link. On clicking the link, the **Bill** screen appears where you can view the details of the respective bill.
Due Date	Displays the date when the bill is due for payment.
Outstanding Amount	Displays the unpaid amount of the bill.
Hold Amount	Displays the amount of the bill which is kept on hold through a hold request.

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<table>
<tr><th>Column Name</th><th>Column Description</th></tr>
<tr><td>Funding Amount</td><td>Displays the bill amount which can be used for the funding process. It is calculated in the following manner:<table><tr><th>Bill Type</th><th>Funding Amount for the Bill</th></tr><tr><td>Debit Bill</td><td>Outstanding Bill Amount - Hold Amount (set on the bill in a hold request) - Offset Amount (set on the bill in an offset request)</td></tr><tr><td>Credit Bill</td><td>Outstanding Bill Amount - Hold Amount (set on the bill in a hold request) - Offset Amount (set on the bill in an offset request) - Garnishment Amount (set on the bill in a funding request)</td></tr></table></td></tr>
<tr><td>Person Name</td><td>Indicates the person to whom the bill belongs. In addition, this column has a context menu which helps in navigating to other screens in the application.

Note: It has a link. On clicking the link, the **Person** screen appears where you can view the details of the respective person.</td></tr>
<tr><td>Bill ID</td><td>Displays the bill ID.</td></tr>
<tr><td>Defer Auto Pay</td><td>Indicates whether the **Defer Auto Pay** option is selected on the customer class of the account for which the bill is created. The valid values are:
• N
• Y</td></tr>
</table>

Note: Pagination is used to display limited number of records in the **Search Results** section. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

In addition, this section contains the following button:

Button Name	Button Description
Add	Used to add a bill to the funding request.

A check box appears corresponding to each bill. On selecting the check box, you can add the bill to the funding request. You can also select multiple bills at the same time. In addition, you can select the check box corresponding to the column header. This allows you to add all bills listed in the respective page to the funding request.

Related Topics

For more information on...	See...
How to add a debit or credit bill to a funding request	Adding a Debit or Credit Bill to a Funding Request on page 1707

Funding Request - Bills

The **Bills** tab lists the bills which are added in the funding request. It contains the following zones:

- Currency Statistics on page 1702
- Selected Bills on page 1702
- Funding Payment Details on page 1705

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> **Note:** This zone appears when the funding request is in the **Processed** status and the funding amount of the bill is in debit.

- Funding Adjustments on page 1705

> **Note:** This zone appears when the funding request is in the **Processed** status and the funding amount of the bill is in credit.

Currency Statistics

A funding request might include bills in different currencies. The **Currency Statistics** zone lists the sum total of various amount of bills which are created in the same currency. It contains the following columns:

Column Name	Column Description
Currency Code	Indicates the currency in which the sum total is calculated. **Note:** Here, the system lists those currencies in which the bills added to the funding request are created.
Total Outstanding Amount	Displays the sum of outstanding amount of all bills which are created in the respective currency.
Total Hold Amount	Displays the sum of hold amount of all bills which are created in the respective currency.
Total Garnishment Amount	Displays the sum of garnishment amount of all bills which are created in the respective currency.
Total Debit Funding Amount	Displays the sum of funding amount (which is in debit) of all bills which are created in the respective currency.
Total Credit Funding Amount	Displays the sum of funding amount (which is in credit) of all bills which are created in the respective currency.

Selected Bills

The **Selected Bills** zone lists the debit and credit bills which are added to the funding request. It contains the following columns:

Column Name	Column Description
Bill Date	Displays the date when the bill is created.
Person Identifier	Displays the primary identifier of the person for whom the bill is created.
Person Country	Indicates the country where the person is located.
Invoice Account Identifier	Displays the primary identifier of the account for which the bill is created.
Funding Amount	Displays the bill amount which can be used for the funding process. It is calculated in the following manner: **Bill Type** / **Funding Amount for the Bill** Debit Bill: Outstanding Bill Amount - Hold Amount (set on the bill in a hold request) - Offset Amount (set on the bill in an offset request) Credit Bill: Outstanding Bill Amount - Hold Amount (set on the bill in a hold request) - Offset Amount (set on the bill in an offset

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<table>
<tr><th>Column Name</th><th>Column Description</th></tr>
<tr><td></td><td>
<table>
<tr><th>Bill Type</th><th>Funding Amount for the Bill</th></tr>
<tr><td></td><td>request) - Garnishment Amount (set on the bill in a funding request)</td></tr>
</table>

Note: The funding amount is calculated in the bill's currency.
</td></tr>
<tr><td>Currency Code</td><td>Indicates the currency in which the funding amount is calculated.</td></tr>
<tr><td>Hold Amount</td><td>Displays the amount of the bill which is kept on hold through a hold request.</td></tr>
<tr><td>Offset Amount</td><td>Displays the amount of the bill which is offset against another bill through an offset request.</td></tr>
<tr><td>Garnishment Amount</td><td>Displays the amount of the credit bill which is transferred to the garnishment contracts of the account through the funding request.</td></tr>
<tr><td>Original Outstanding Amount</td><td>Displays the original outstanding amount when the bill was added in the funding request.</td></tr>
<tr><td>Bill ID</td><td>Displays the bill ID.
Note: It has a link. On clicking the link, the Bill screen appears where you can view the details of the respective bill.</td></tr>
<tr><td>Open Bills</td><td>Indicates whether there are any unpaid bills of the person. The valid values are:
• Y
• N</td></tr>
<tr><td>Garnishment Contract</td><td>Indicates whether the garnishment contract exists for the account. The valid values are:
• Y
• N
Note:
This column appears when the funding request is in the Draft status.
The data appears in this column when a credit bill is added to the funding request.
It has a link. On clicking the link, the Edit Garnishment Details screen appears where you can transfer the funding amount from the credit bill to one or more garnishment contracts of the account.</td></tr>
<tr><td>Garnishment</td><td>On clicking the View (🔗) icon, the View Garnishment Details screen appears where you can view the funding amount transferred to the different garnishment contracts of the account.
Note:
This column does not appear when the funding request is in the Draft status.
The View (🔗) icon appears in this column when the funding request is in the Processed status.</td></tr>
<tr><td>Record Status</td><td>Indicates the status of the bill record in the funding request. The valid values are:</td></tr>
</table>

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Column Name	Column Description
	• Excluded • Invalid • Masked • Pending • Processed • Valid • Error
Threshold Range	Indicates the threshold range for a bill which is calculated based on the number of payments made for the bill in the specified period.
Person Name	Indicates the person whose bill is added in the funding request.
Bill Information	Displays the information about the bill.
Split Banking	Indicates whether the split automatic payment feature is used for the account. The valid values are: • Y • N
Funding Currency Amount	Displays the funding amount which is converted in the funding currency defined on the account.

Note: Pagination is used to display limited number of records in the **Search Results** section. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

In addition, this section contains the following button:

Button Name	Button Description
Delete	Used to delete a bill from the funding request.
	Note: The **Delete** button appears when the funding request is created manually and it is in the **Draft** status.
Edit	Used to exclude a debit or credit bill from the funding request.
	Note: The **Edit** button appears when the funding request is created automatically and it is in the **Draft** status.
Hold	Used to create a hold request for one or more bills. However, you cannot select more than 20 bills. On activating or releasing a hold request, the funding amount is automatically updated in the funding request.
	Note: The **Hold** button appears only when the funding request is in the **Draft** status.
Offset	Used to create an offset request for a bill. On processing or unapplying an offset request, the funding amount is automatically updated in the funding request.
	Note: The **Offset** button appears when the funding request is in the **Draft** status.

A check box appears corresponding to each bill when the funding request is in the **Draft** status. On selecting the check box, you can delete the bill from the funding request. You can also select multiple bills at the same time. In addition, you

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can select the check box corresponding to the column header. This allows you to delete all bills listed in the respective page from the funding request.

On clicking the **Broadcast** (📡) icon corresponding to a debit or credit bill, the **Funding Payment Details** or **Funding Adjustments** zone appears, respectively.

Note: The **Broadcast** icon does not appear when the funding request is in the **Draft** status.

You can filter the list using various search criteria (such as, **Bill ID**, **Alternate Bill ID**, **Record Status**, **Bill Balance**, **Funding Amount From**, **Person ID**, **Funding Amount To**, **Currency**, **Funding Amount Threshold Range**, and **Country**) available in the **Filter** area. By default, the **Filter** area is hidden. You can view the **Filter** area by clicking the **Filters** (▽) icon in the upper right corner of this zone.

Related Topics

For more information on...	See...
How to delete a debit or credit bill from a funding request	Deleting a Debit or Credit Bill from a Funding Request on page 1707
Funding Payment Details zone	Funding Payment Details on page 1705
Funding Adjustments zone	Funding Adjustments on page 1705
How to transfer the funding amount of a credit bill to a garnishment contract	Transferring the Funding Amount of a Credit Bill to a Garnishment Contract on page 1721
How to view the garnishment details of a credit bill	Viewing the Garnishment Details of a Credit Bill on page 1722
How to exclude a debit or credit bill from a funding request	Excluding a Bill from a Funding Request on page 1708

Funding Payment Details

The **Funding Payment Details** zone lists the payment events which are created for a debit bill through the funding request. It appears when the funding request is in the **Processed** status. It contains the following columns:

Column Name	Column Description
Payment Event Information	Displays information about the payment event. **Note:** It has a link. On clicking the link, the **Payment Event** screen appears where you can view the details of the respective payment event.
Payment Amount	Displays the amount for which automatic payment is created.

Note: Pagination is used to display limited number of records in the **Search Results** section. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

Funding Adjustments

The **Funding Adjustments** zone lists the funding and garnishment adjustments which are created for a credit bill through the funding request. It appears when the funding request is in the **Processed** status. It contains the following columns:

Column Name	Column Description
Adjustment Information	Displays information about the funding or garnishment adjustment.

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Column Name	Column Description
	Note: It has a link. On clicking the link, the **Adjustment** screen appears where you can view the details of the respective adjustment.
Adjustment Amount	Displays the adjustment amount.

Note: Pagination is used to display limited number of records in the **Search Results** section. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

Funding Request - Log

The **Log** tab contains the following zone:

- Funding Request Log on page 1706

Funding Request Log

The **Funding Request Log** zone lists the complete trail of actions performed on the funding request. It contains the following columns:

Column Name	Column Description
Date/Time	Displays the date and time when the action was performed on the funding request.
Details	Displays the details of the action performed on the funding request.
User	Indicates the user who has performed the action on the funding request.
Log Type	Indicates the type of log.
Related Object	Indicates the object or entity which is created when the action is performed on the funding request.
	Note: At present, no data appears in this column. The implementation team can build the custom logic to meet the business requirements.
Status Reason	Indicates the reason why the funding request was rejected by the approver.
	Note: The data appears in this column when the funding request is in the **Rejected** status.

Note: You can manually add a log entry for the funding request by clicking the **Add Log Entry** link in the upper right corner of the **Funding Request Log** zone.

Related Topics

For more information on...	See...
How to view the log of a funding request	Viewing the Log of a Funding Request on page 1724
How to add a log entry for a funding request	Adding a Log Entry for a Funding Request on page 1724

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Adding a Debit or Credit Bill to a Funding Request

In a funding request, you can only add the debit or credit bills of the accounts for which the **Defer Auto Pay** option is selected on the respective customer class.

Procedure

To add a debit or credit bill to a funding request:

1. Search for the funding request in the **Funding Request** screen.
2. In the **Search Results** section, click the link in the **Funding Request Information** column corresponding to *t*he funding request whose details you want to edit.
   The **Funding Request** screen appears.
3. Ensure that the **Main** tab is selected.
4. Enter the search criteria in the **Search Bill** zone.

> **Note:**
>
> The **Search Bill** zone appears when the funding request is in the **Draft** status.
>
> ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.

5. Click **Search**.
   A list of bills that meet the search criteria appears in the **Search Results** section.
6. Select the check box corresponding to a bill that you want to add to the funding request.
7. Click the **Add** button in the **Search Bill** zone.
   A message appears indicating that the bill is added to the funding request.

> **Note:** You can only add a debit or credit bill of an account for which the **Defer Auto Pay** option is selected on the respective customer class.

8. Click **OK**.
   The bill is added to the funding request. The status of the bill record in the funding request is set to **Pending**.

Related Topics

For more information on...	**See...**
How to search for a funding request	Searching for a Funding Request on page 1692
Funding Request screen	Funding Request (Used for Viewing) on page 1694
Search Bill zone	Search Bill on page 1698
How to create a funding request	Creating a Funding Request on page 1693

Deleting a Debit or Credit Bill from a Funding Request

Procedure

To delete a debit or credit bill from a funding request:

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1. Search for the funding request in the **Funding Request** screen.
2. In the **Search Results** section, click the link in the **Funding Request Information** column corresponding to *t*he funding request whose details you want to edit.
   The **Funding Request** screen appears.
3. Click the **Bills** tab.
   The **Bills** tab appears.
4. In the **Selected Bills** zone, select the check box corresponding to a bill that you want *t*o delete from the funding request.
5. Click the **Delete** button in the **Selected Bills** zone.
   A message appears confirming whether you want to delete the bill from the funding request.

   Note: The **Delete** button appears when the funding request is in the **Draft** status.
6. Click **OK**.
   The debit or credit bill is deleted from the funding request.

Related Topics

For more information on...	See...
How to search for a funding request	Searching for a Funding Request on page 1692
Funding Request screen	Funding Request (Used for Viewing) on page 1694
Selected Bills zone	Selected Bills on page 1702

Excluding a Bill from a Funding Request

If the funding request is manually created through the user interface, you add or delete bills from the funding request when it is in the **Draft** status. However, if the funding request is automatically created through a custom logic, the system allows you to exclude the required bills from the funding request when it is in the **Draft** status. In such case, the status of the record in the funding request is changed to **Excluded**. The excluded bills can then be included in some other funding request.

Prerequisites

To exclude a bill from a funding request, you should have:

- Values defined for the **CAN_RSN_CD_FLG** lookup field

Procedure

To exclude a bill from a funding request:

1. Search for the funding request in the **Funding Request** screen.
2. In the **Search Results** section, click the link in the **Funding Request Information** column corresponding to *t*he funding request whose details you want to edit.
   The **Funding Request** screen appears.
3. Click the **Bills** tab.
   The **Bills** tab appears.
4. In the **Selected Bills** zone, select the check box corresponding to a bill that you want *t*o exclude from the funding request.
5. Click the **Edit** button in the **Selected Bills** zone.

   The **Edit Funding Request Details** screen appears. It contains the following field:

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Field Name	Field Description
Funding Request Information	Displays the information about the funding request.

In addition, this screen contains the following fields in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Bill Information	Displays the information about the bill.	Not applicable
Garnishment Amount	Displays the funding amount which is transferred to the garnishment contracts of the account.	Not applicable
Funding Amount	Displays the bill amount which can be used for the funding process. It is calculated in the following manner: **Bill Type** / **Funding Amount for the Bill** Debit Bill: Outstanding Bill Amount - Hold Amount (set on the bill in a hold request) - Offset Amount (set on the bill in an offset request) Credit Bill: Outstanding Bill Amount - Hold Amount (set on the bill in a hold request) - Offset Amount (set on the bill in an offset request) - Garnishment Amount (set on the bill in a funding request)	Not applicable
Status	Used to indicate the status of the record in the funding request. The valid values are: • Excluded • Invalid • Masked • Pending • Processed • Valid	Yes
Cancel Reason	Used to indicate the reason why you want to exclude the bill from the funding request. **Note:** The list includes only those values which are defined in the **CAN_RSN_CD_FLG** lookup field.	Yes (Conditional) **Note:** This field is required when you want to exclude the bill from the funding request.

Note: The **Edit** button appears when the creation mode of the funding request is set to **Automatic** and the funding request is in the **Draft** status.

6. Select the **Excluded** option from the **Status** field.
7. Select the required cancel reason from the respective field.
8. Click **Save**.
   The bill is excluded from the funding request. The status of the bill record in the funding request is set to **Excluded**.

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Related Topics

For more information on...	See...
How to search for a funding request	Searching for a Funding Request on page 1692
Funding Request screen	Funding Request (Used for Viewing) on page 1694
Selected Bills zone	Selected Bills on page 1702

Editing a Funding Request

Prerequisites

To edit a funding request, you should have:

- Funding adjustment types defined in the application (where the **A/P Request Type Code** field is set to **REFUND**)
- Garnishment adjustment types defined in the application (where the **A/P Request Type Code** field is not set to **REFUND**)

Procedure

To edit a funding request:

1. Search for the funding request in the **Funding Request** screen.
2. In the **Search Results** section, click the link in the **Funding Request Information** column corresponding to *t*he funding request whose details you want to edit.
   The **Funding Request** screen appears.
3. Click the **Edit** button in the **Funding Request** zone.

   The **Edit Funding Request** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details about the funding request.
   - **Characteristics** - Used to define the characteristics for the funding request.

   The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Funding Request Information	Displays information about the funding request.	Not applicable
Funding Adjustment Type	Used to indicate the adjustment type using which the A/P adjustment should be created against a credit bill. **Note:** The **Search** (🔍) icon appears corresponding to the **Funding Adjustment Type** field. On clicking the **Search** icon, the **Adjustment Type Search** window appears. In the **Funding Adjustment Type** field, you can only specify an adjustment type where the **A/P Request Type Code** field is set to **REFUND**.	Yes (Conditional) **Note:** This field is required while creating an A/P adjustment against a credit bill.
Garnishment Adjustment Type	Used to indicate the adjustment type using which the garnishment adjustment should be	Yes (Conditional)

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Field Name	Field Description	Mandatory (Yes or No)
	created when the amount from the credit bill is transferred to the garnishment contract of the account.	**Note:** This field is required while creating garnishment adjustments for a credit bill.
	Note: The **Search** (🔍) icon appears corresponding to the **Garnishment Adjustment Type** field. On clicking the **Search** icon, the **Adjustment Type Search** window appears. In the **Garnishment Adjustment Type** field, you can only specify an adjustment type where the **A/P Request Type Code** field is not set to **REFUND**.	
Comments	Used to specify additional information about the funding request.	No

Note: The **Edit** button appears when the funding request is in the **Draft** status.

4. Modify the details of the funding request, if required.
5. Define, edit, or remove characteristics of the funding request, if required.
6. Click **Save**.
   The changes made to the funding request are saved.

Related Topics

For more information on...	See...
How to search for a funding request	Searching for a Funding Request on page 1692
Funding Request screen	Funding Request (Used for Viewing) on page 1694
Funding Request zone	Funding Request on page 1695
How to define a characteristic for a funding request	Defining a Characteristic for a Funding Request on page 1711

Defining a Characteristic for a Funding Request

Prerequisites

To define a characteristic for a funding request, you should have:

- Characteristic types defined in the application (where the characteristic entity is set to **Funding Request**)

Procedure

To define a characteristic for a funding request:

1. Ensure that the **Characteristics** section is expanded when you are editing a funding request.

   The **Characteristics** section contains the following fields in a grid:

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Field Name	Field Description	Mandatory (Yes or No)
Effective Date	Used to specify the date from when the characteristic is effective for the funding request.	Yes (Conditional) **Note:** This field is required when you are defining a characteristic for the funding request.
Characteristic Type	Used to indicate the characteristic type. **Note:** The list includes only those characteristic types where the characteristic entity is set to **Funding Request**.	Yes (Conditional) **Note:** This field is required when you are defining a characteristic for the funding request.
Characteristic Value	Used to specify the value for the characteristic type. **Note:** If you select a predefined characteristic type, the **Search** (🔍) icon appears corresponding to the **Characteristic Value** field. On clicking the **Search** icon, you can search for a predefined characteristic value. On specifying the value for a predefined characteristic type, the description of the characteristic value appears corresponding to the **Characteristic Value** field.	Yes (Conditional) **Note:** This field is required when you are defining a characteristic for the funding request.

2. Enter the required details in the **Characteristics** section.
3. If you want to define more than one characteristic for the funding request, click the **Add** (+) icon and then *r*epeat step *2*.

Note: However, if you want to remove a characteristic from the funding request, click the **Delete** (🗑) icon corresponding to the characteristic.

Related Topics

For more information on...	See...
How to edit a funding request	Editing a Funding Request on page 1710

Deleting a Funding Request

Procedure

To delete a funding request:

1. Search for the funding request in the **Funding Request** screen.
2. In the **Search Results** section, click the link in the **Funding Request Information** column corresponding to *t*he funding request that you want to delete.

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The **Funding Request** screen appears.

3. Click the **Delete** button in the **Funding Request** zone.
   A message appears confirming whether you want to delete the funding request.

> **Note:** The **Delete** button appears when the funding request is in the **Draft** status.

4. Click **OK**.
   The funding request is deleted.

Related Topics

For more information on...	See...
How to search for a funding request	Searching for a Funding Request on page 1692
Funding Request screen	Funding Request (Used for Viewing) on page 1694
Funding Request zone	Funding Request on page 1695

Cancelling a Funding Request

Prerequisites

To cancel a funding request, you should have:

- Reasons defined for the **Canceled** status of the **C1-FundingRequest** business object in the **Status Reason** screen

Procedure

To cancel a funding request:

1. Search for the funding request in the **Funding Request** screen.
2. In the **Search Results** section, click the link in the **Funding Request Information** column corresponding to *t*he funding request that you want to cancel.
   The **Funding Request** screen appears.
3. Click the **Cancel** button in the **Funding Request** zone.

   The **Funding Request** window appears. It contains the following field:

Field Name	Field Description	Mandatory (Yes or No)
Status Reason	Used to indicate the reason why you want to cancel the funding request. **Note:** The list includes only those reasons which are defined for the **Canceled** status of the **C1-FundingRequest** business object in the **Status Reason** screen.	Yes

> **Note:** The **Cancel** button appears when the funding request is in the **Draft** status.

4. Select the cancelation reason from the **Status Reason** list.
5. Click **Save**.
   The status of all records in the funding request is changed to **Excluded** and the status of the funding request is changed to **Canceled**. The excluded bills can then be included in some other funding request.

Related Topics

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For more information on...	See...
How to search for a funding request	Searching for a Funding Request on page 1692
Funding Request screen	Funding Request (Used for Viewing) on page 1694
Funding Request zone	Funding Request on page 1695

Submitting a Funding Request

Prerequisites

To submit a funding request, you should have:

- At least one debit or credit bill in the funding request
- Funding and garnishment adjustment types defined in the funding request
- Funding adjustment type defined in the application (where the **A/P Request Type Code** field is set to **REFUND**)
- Garnishment adjustment type defined in the application (where the **A/P Request Type Code** field is not set to **REFUND**)

Procedure

To submit a funding request:

1. Search for the funding request in the **Funding Request** screen.
2. In the **Search Results** section, click the link in the **Funding Request Information** column corresponding to *t*he funding request that you want to submit.
   The **Funding Request** screen appears.
3. Click the **Submit** button in the **Funding Request** zone.

   The system behaves in the following manner:

<table>
<tr><th>If...</th><th>Then...</th></tr>
<tr><td>The Approval Required option is selected in the funding request type using which the funding request is created</td><td>It calculates the sum of total debit and credit amount in the funding request. Depending on whether the sum total is debit or credit, it uses the debit or credit hierarchy in the approval profile (which is specified in the funding request type), respectively. Depending on the sum total amount, the system behaves in the following manner:
<table>
<tr><th>If...</th><th>Then...</th></tr>
<tr><td>The sum total is less than the minimum threshold amount in the approval hierarchy</td><td>The system automatically approves the funding request and changes the status of the funding request to either Deferred Processing or Create Funding depending on whether the number of bills in the funding request exceeds the defer processing count.</td></tr>
<tr><td>The sum total is equal to or greater than the threshold amount specified at the</td><td>The system changes the status of the funding request to Approval In Progress. It creates a To</td></tr>
</table></td></tr>
</table>

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<table>
<tr><th>If...</th><th>Then...</th></tr>
<tr><td></td><td>
<table>
<tr><th>If...</th><th>Then...</th></tr>
<tr><td>first level in the approval hierarchy</td><td>Do using the To Do type specified in the approval profile and assigns it to the users with the To Do role defined at the first level in the approval hierarchy. In addition, it creates a log entry for the funding request when the To Do is created.</td></tr>
</table>
</td></tr>
<tr><td>The Approval Required option is not selected in the funding request type using which the funding request is created</td><td>The system changes the status of the funding request to either Deferred Processing or Create Funding depending on whether the number of bills in the funding request exceeds the defer processing count.

Once the Funding Request Periodic Monitor (C1-FNDRQ) batch is executed, it checks whether there are any funding requests in the Deferred Processing status. If so, it changes the status of the funding request to Create Funding.

Once the status of a funding request is changed to Create Funding, the system creates the A/P adjustment against a bill when the funding amount of the bill is in credit. It also creates non A/P adjustments using the garnishment adjustment type when the funding amount of a credit bill is transferred to the garnishment contracts of the account. However, if the funding amount of a bill is in debit, the funding amount is stamped as the automatic payment amount against the bill in the CI_BILL_ACH table. Then, on executing the Create Automatic Payments and Refunds (APAYCRET) batch, the system creates automatic payment and payment event for such bill.

Note: The funding and garnishment adjustments are created in the Frozen status.</td></tr>
</table>

Note: The **Submit** button appears when the funding request is in the **Draft** status.

Related Topics

For more information on...	See...
How to search for a funding request	Searching for a Funding Request on page 1692
Funding Request screen	Funding Request (Used for Viewing) on page 1694
Funding Request zone	Funding Request on page 1695

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Approving a Funding Request

You can view the number of funding requests which are pending for approval in the **Funding Request** screen. The approver can review, and accordingly approve, reject, or ask the submitter to resubmit the funding request based on the observations.

Note: The system will not allow you to approve, reject or resubmit a funding request submitted by you.

Procedure

To approve a funding request:

1. Do either of the following:

If you want to...	Then...
Approve a funding request through the Funding Request screen	**a.** Search for the funding request in the **Funding Request** screen. **b.** In the **Search Results** section, click the link in the **Funding Request Information** column corresponding to the funding request which you want to review.
Approve a funding request from the To Do List screen	**a.** Click the **Menu** link in the **Application** toolbar. A list appears. **b.** From the **Main** menu, select **To Do** and then click **To Do List**. The **To Do Type for User Search** window appears. **c.** Enter **C1-FNDAP** in the **To Do Type** field. **d.** Click the **Search** button corresponding to the **To Do Type** field. The **To Do List** screen appears. **e.** Select the **Open** option from the **Filter by** list to view all unassigned To Dos. **f.** Click the link in the **Message** column corresponding to the To Do of the funding request that you want to review.

   The **Funding Request** screen appears.
2. Review the details in the **Funding Request** screen.
3. If the information in the funding request is accurate, then click the **Approve** button in the **Funding Request** zone.

   The system behaves in the following manner:

If...	Then...
The sum total of the debit and credit amount is equal to or greater than the threshold amount specified at the next level in the approval hierarchy	The system changes the status of the funding request to **Approval In Progress**. It creates a To Do using the To Do type specified in the approval profile and assigns it to the users with the To Do role defined at the next level in the approval hierarchy. In addition, it creates a log entry for the funding request when the To Do is created.

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If...	Then...
The sum total of the debit and credit amount is less than the threshold amount specified at the next level in the approval hierarchy	The system changes the status of the funding request to either **Deferred Processing** or **Create Funding** depending on whether the number of bills in the funding request exceeds the defer processing count. Once the **Funding Request Periodic Monitor (C1-FNDRQ)** batch is executed, it checks whether there are any funding requests in the **Deferred Processing** status. If so, it changes the status of the funding request to **Create Funding**. Once the status of a funding request is changed to **Create Funding**, the system creates the A/P adjustment against a bill when the funding amount of the bill is in credit. It also creates non A/P adjustments using the garnishment adjustment type when the funding amount of a credit bill is transferred to the garnishment contracts of the account. However, if the funding amount of a bill is in debit, the funding amount is stamped as the automatic payment amount against the bill in the **CI_BILL_ACH** table. Then, on executing the **Create Automatic Payments and Refunds (APAYCRET)** batch, the system creates automatic payment and payment event for such bill. **Note:** The funding and garnishment adjustments are created in the **Frozen** status.

Note: The **Approve** button appears when:

- The funding request is in the **Approval In Progress** status.
- A user with the approval To Do role is reviewing the funding request.

Related Topics

For more information on...	See...
How to search for a funding request	Searching for a Funding Request on page 1692
Funding Request screen	Funding Request (Used for Viewing) on page 1694
Funding Request zone	Funding Request on page 1695

Rejecting a Funding Request

Prerequisites

To reject a funding request, you should have:

- Reasons defined for the **Rejected** status of the **C1-FundingRequest** business object in the **Status Reason** screen

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Note:

While rejecting a funding request, you need to specify the reason why you want to reject the funding request. You can select the appropriate rejection reason when you have defined the reasons for the **Rejected** status of the **C1-FundingRequest** business object in the **Status Reason** screen.

The system will not allow you to approve, reject or resubmit a funding request submitted by you.

Procedure

To reject a funding request:

1. Do either of the following:

If you want to...	Then...
Reject a funding request through the Funding Request screen	**a.** Search for the funding request in the **Funding Request** screen. **b.** In the **Search Results** section, click the link in the **Funding Request Information** column corresponding to the funding request which you want to review.
Reject a funding request from the To Do List screen	**a.** Click the **Menu** link in the **Application** toolbar. A list appears. **b.** From the **Main** menu, select **To Do** and then click **To Do List**. The **To Do Type for User Search** window appears. **c.** Enter **C1-FNDAP** in the **To Do Type** field. **d.** Click the **Search** button corresponding to the **To Do Type** field. The **To Do List** screen appears. **e.** Select the **Open** option from the **Filter by** list to view all unassigned To Dos. **f.** Click the link in the **Message** column corresponding to the To Do of the funding request that you want to review.

   The **Funding Request** screen appears.
2. Review the details in the **Funding Request** screen.
3. If the information in the funding request is incorrect, then click the **Reject** button in the **Funding Request** zone.

   The **Reject Funding Request** window appears. It contains following fields:

Field Name	Field Description	Mandatory (Yes or No)
Status Reason	Used to indicate the reason why you want to reject the funding request. **Note:** The list includes only those reasons which are defined for the **Rejected** status of the **C1-FundingRequest** business object in the **Status Reason** screen.	Yes
Comments	Used to specify additional information while rejecting the funding request.	No

Note: The **Reject** button appears when:

- The funding request is in the **Approval In Progress** status.
- A user with the approval To Do role is reviewing the funding request.

4. Select the rejection reason from the **Status Reason** list.

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5. Click **Save**.
   The status of the funding request is changed to **Rejected**.

Related Topics

For more information on...	See...
How to search for a funding request	Searching for a Funding Request on page 1692
Funding Request screen	Funding Request (Used for Viewing) on page 1694
Funding Request zone	Funding Request on page 1695

Requesting to Resubmit a Funding Request

Procedure

To request for resubmitting a funding request:

1. Do either of the following:

If you want to...	Then...
Request for resubmitting a funding request through the Funding Request screen	**a.** Search for the funding request in the **Funding Request** screen. **b.** In the **Search Results** section, click the link in the **Funding Request Information** column corresponding to the funding request which you want to review.
Request for resubmitting a funding request from the To Do List screen	**a.** Click the **Menu** link in the **Application** toolbar. A list appears. **b.** From the **Main** menu, select **To Do** and then click **To Do List**. The **To Do Type for User Search** window appears. **c.** Enter **C1-FNDAP** in the **To Do Type** field. **d.** Click the **Search** button corresponding to the **To Do Type** field. The **To Do List** screen appears. **e.** Select the **Open** option from the **Filter by** list to view all unassigned To Dos. **f.** Click the link in the **Message** column corresponding to the To Do of the funding request that you want to review.

   The **Funding Request** screen appears.
2. Review the details in the **Funding Request** screen.
3. If the information in the funding request is incomplete and you want the submitter to make the required changes and resubmit the funding request for approval, then click the **Re Submit** button in the **Funding Request** zone.

   The **Resubmit Funding Request** window appears. It contains the following field:

Field Name	Field Description	Mandatory (Yes or No)
Comments	Used to specify the changes which the submitter should make in the funding request before resubmitting it for approval.	Yes

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> **Note:** The **Re Submit** button appears when:
>
> - The funding request is in the **Approval In Progress** status.
> - A user with the approval To Do role is reviewing the funding request.

4. Enter the comments in the respective field and then click **Save**.
   A To Do is created using the submitter To Do type and assigned to all users with a submitter To Do role specified in the funding request type. In addition, the status of the funding request is changed to **Draft**.

Related Topics

For more information on...	See...
How to search for a funding request	Searching for a Funding Request on page 1692
Funding Request screen	Funding Request (Used for Viewing) on page 1694
Funding Request zone	Funding Request on page 1695

Withdrawing a Funding Request

Prerequisites

To withdraw a funding request, you should have:

- Submitter To Do role (which is specified in the funding request type) associated with the **C1-FNDAP** To Do type

Procedure

To withdraw a funding request:

1. Search for the funding request in the **Funding Request** screen.
2. In the **Search Results** section, click the link in the **Funding Request Information** column corresponding to *t*he funding request that you want to withdraw.
   The **Funding Request** screen appears.
3. If you want to make some changes in the funding request which is already sent for approval, click the **Withdraw** button in the **Funding Request** zone.
   The status of the funding request is changed to **Draft**. The submitter can then make the required changes and resubmit the funding request for approval. The To Do for approver is automatically closed when the submitter withdraws the funding request. Note that the To Do for approver is automatically closed when the submitter To Do role is associated with the To Do type specified in the approval profile.

> **Note:** The **Withdraw** button appears when:
>
> - The funding request is in the **Approval In Progress** status.
> - A user with the submitter To Do role is viewing the funding request.

Related Topics

For more information on...	See...
How to search for a funding request	Searching for a Funding Request on page 1692
Funding Request screen	Funding Request (Used for Viewing) on page 1694
Funding Request zone	Funding Request on page 1695

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Transferring the Funding Amount of a Credit Bill to a Garnishment Contract

Prerequisites

To transfer the funding amount of a credit bill to a garnishment contract, you should have:

- At least one garnishment contract on the account

Note: The garnishment contract is a contract which is created using a contract type where the **Special Role Flag** field is set to **Garnishment**.

Procedure

To transfer the funding amount of a credit bill to a garnishment contract:

1. Search for the funding request in the **Funding Request** screen.
2. In the **Search Results** section, click the link in the **Funding Request Information** column corresponding to *t*he funding request whose details you want to edit.
   The **Funding Request** screen appears.
3. Click the **Bills** tab.
   The **Bills** tab appears.
4. In the **Selected Bills** zone, click the link on the value **Y** in the **Garnishment Contract** column corresponding *t*o a credit bill whose funding amount you want to transfer to a garnishment contract of the account.

   The **Edit Garnishment Details** screen appears. It contains the following field:

Field Name	Field Description
Bill Information	Indicates the credit bill whose funding amount you want to transfer to a garnishment contract of the account.

   In addition, this screen contains the following fields in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Garnishment Contract	Used to indicate the garnishment contract of the account.	Yes
Garnishment Amount	Used to specify the amount that you want to transfer to the garnishment contract.	Yes

5. Enter the required details in the **Edit Garnishment Details** screen.
6. If you want to transfer the funding amount of the credit bill to more than one garnishment contract of the account, click the **Add** (+) icon and *t*hen repeat step *5*.

   Note: However, if you want to remove a garnishment record from the funding request, click the **Delete** (🗑) icon corresponding to the garnishment record.
7. Click **Save**.
   The changes made to the funding request are saved.

Related Topics

For more information on...	See...
How to search for a funding request	Searching for a Funding Request on page 1692
Funding Request screen	Funding Request (Used for Viewing) on page 1694

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For more information on...	See...
Selected Bills zone	Selected Bills on page 1702

Viewing the Garnishment Details of a Credit Bill

Procedure

To view the garnishment details of a credit bill:

1. Search for the funding request in the **Funding Request** screen.
2. In the **Search Results** section, click the link in the **Funding Request Information** column corresponding to *t*he funding request whose details you want to view.
   The **Funding Request** screen appears.
3. Click the **Bills** tab.
   The **Bills** tab appears.
4. In the **Selected Bills** zone, click the **Broadcast** icon in the **Garnishment** column corresponding *t*o the credit bill whose garnishment details you want to view.

   The **View Garnishment Details** screen appears. It contains the following field:

Field Name	Field Description
Bill Info	Indicates the credit bill whose garnishment details you are viewing.

In addition, this screen contains the following columns:

Column Name	Column Description
Garnishment Contract	Indicates the garnishment contract of the account against which amount from the credit bill is transferred.
Garnishment Amount	Displays the amount which is transferred to the garnishment contract.

Note:

The **Garnishment** column does not appear when the funding request is in the **Draft** status.

The **View** (🔗) icon appears in the **Garnishment** column only when the funding request is in the **Processed** status.

Related Topics

For more information on...	See...
How to search for a funding request	Searching for a Funding Request on page 1692
Funding Request screen	Funding Request (Used for Viewing) on page 1694
Selected Bills zone	Selected Bills on page 1702

Viewing the Payments Created Through a Funding Request

Procedure

To view the payments created through a funding request:

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1. Search for the funding request in the **Funding Request** screen.
2. In the **Search Results** section, click the link in the **Funding Request Information** column corresponding to *t*he funding request whose details you want to view.
   The **Funding Request** screen appears.
3. Click the **Bills** tab.
   The **Bills** tab appears.
4. In the **Selected Bills** zone, click the **Broadcast** (📡) icon corresponding to a debit bill whose payment details you want to view.
   The **Funding Payments Details** zone appears.

> **Note:** The **Broadcast** (📡) icon appears when the funding request is in the **Processed** status.

5. View the payments created for the debit bill through the funding request in the **Funding Payments Details** zone.

> **Note:** The data appears in the **Funding Payments Details** zone when the **Create Automatic Payments and Refunds (APAYCRET)** batch is executed to create the automatic payment and payment event for the debit bill. For more information about the batch, refer to *Oracle Revenue Management and Billing Batch Guide*.

Related Topics

For more information on...	See...
How to search for a funding request	Searching for a Funding Request on page 1692
Funding Request screen	Funding Request (Used for Viewing) on page 1694
Selected Bills zone	Selected Bills on page 1702
Funding Payments Details zone	Funding Payment Details on page 1705

Viewing the Adjustments Created Through a Funding Request

Procedure

To view the adjustments created through a funding request:

1. Search for the funding request in the **Funding Request** screen.
2. In the **Search Results** section, click the link in the **Funding Request Information** column corresponding to *t*he funding request whose details you want to view.
   The **Funding Request** screen appears.
3. Click the **Bills** tab.
   The **Bills** tab appears.
4. In the **Selected Bills** zone, click the **Broadcast** (📡) icon corresponding to a credit bill *w*hose adjustment details you want to view.
   The **Funding Adjustments** zone appears.

> **Note:** The **Broadcast** (📡) icon appears when the funding request is in the **Processed** status.

5. View the A/P adjustments and garnishment adjustments (if any) created for the credit bill through the funding request in the **Funding Adjustments** zone.

Related Topics

For more information on...	See...
How to search for a funding request	Searching for a Funding Request on page 1692

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For more information on...	See...
Funding Request screen	Funding Request (Used for Viewing) on page 1694
Selected Bills zone	Selected Bills on page 1702
Funding Adjustments zone	Funding Adjustments on page 1705

Viewing the Log of a Funding Request

Procedure

To view the log of a funding request:

1. Search for the funding request in the **Funding Request** screen.
2. In the **Search Results** section, click the link in the **Funding Request Information** column corresponding to *t*he funding request whose log you want to view.
   The **Funding Request** screen appears.
3. Click the **Log** tab.
   The **Log** tab appears.
4. View the complete trail of actions performed on the funding request in the **Funding Request Log** zone.

Related Topics

For more information on...	See...
How to search for a funding request	Searching for a Funding Request on page 1692
How to add a log entry for a funding request	Adding a Log Entry for a Funding Request on page 1724
Funding Request screen	Funding Request (Used for Viewing) on page 1694
Funding Request Log zone	Funding Request Log on page 1706

Adding a Log Entry for a Funding Request

Procedure

To add a log entry for a funding request:

1. Search for the funding request in the **Funding Request** screen.
2. In the **Search Results** section, click the link in the **Funding Request Information** column corresponding to *t*he funding request whose log you want to edit.
   The **Funding Request** screen appears.
3. Click the **Log** tab.
   The **Log** tab appears.
4. Click the **Add Log Entry** link in the upper right corner of the **Funding Request Log** zone.

   The **Add Request Log** window appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Request Information	Displays information about the funding request.	Not applicable
Log Details	Used to specify additional comments for the funding request.	Yes

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5. Enter the comments in the **Log Details** field.
6. Click **Save**.
   The log entry is added in the **Funding Request Log** zone.

Related Topics

For more information on...	**See...**
How to search for a funding request	Searching for a Funding Request on page 1692
Funding Request screen	Funding Request (Used for Viewing) on page 1694
Funding Request Log zone	Funding Request Log on page 1706

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Chapter 26

Refund/Write Off Request

Topics:

- Prerequisites
- Refund Request (Without Approval) Status Transition
- Refund Request (With Approval) Status Transition
- Write Off Request (Without Approval) Status Transition
- Write Off Request (With Approval) Status Transition
- Account Level Refund/Write Off
- Refund/Write Off Adjustment at Bill Level
- Algorithms Used in C1-RefundReq
- Algorithms Used in C1-WORequest
- Refund/Write Off Request Type
- Refund/Write Off Request (Used for Searching)
- Refund Request (Used for Viewing)
- Write Off Request (Used for Viewing)

Oracle Revenue Management and Billing allows you to refund and write off amount to the account. If the amount received from the payor account is matched against the suspense or excess credit contract, the system facilitates you to refund the amount to the payor. In addition, you can refund the amount of a credit bill line item, such as credit bill segment or adjustment, if required. To refund the amount to the account holder, you need to create refund adjustments through a refund request. While creating a refund request, you need to specify the refund request type using which you want to create the refund request. It is the refund request type which helps the system to determine:

- Whether the refund request must be approved before creating refund adjustments in the system
- Approval profile using which the refund request must be approved
- Whether multi-level or single-level approval is required while creating refund adjustments in the system
- Tolerance limit for refund (i.e. minimum refund amount)
- Adjustment type using which the write up adjustment must be created when the total refund amount is less than the minimum refund amount
- Default adjustment type using which refund adjustments must be created

The system allows you to create refund adjustments only using those adjustment types where A/P request type is defined. Once the refund adjustments are created, the A/P Extract process will extract the information and accordingly refund the amount to the payor. During the refund request process, a refund request goes through various statuses in its lifecycle. For more information about the refund request statuses, see Refund Request (Without Approval) Status Transition on page 1729 and Refund Request (With Approval) Status Transition on page 1732.

Note that the lifecycle of a refund request is driven by the business object using which the refund request is created. A refund request business object named **C1-RefundReq** is shipped with the product. The refund request feature explained in this document is articulated based on the lifecycle and logic defined in the **C1-RefundReq** business object.

Similarly, the system facilitates you to write off the amount to the account through a write off request. While creating a write off request, you need to specify the write off request type using which you want to create the write off request. It is the write off request type which helps the system to determine:

- Whether the write off request must be approved before creating write off adjustments in the system
- Approval profile using which the write off request must be approved
- Whether multi-level or single-level approval is required while creating write off adjustments in the system
- Default adjustment type using which write off adjustments must be created

The system allows you to create write off adjustments only using those adjustment types where A/P request type is not defined. During the write off request process, a write off request goes through various statuses in its lifecycle. For more information about the write off request statuses, see Write Off Request (Without Approval) Status Transition on page 1734 and Write Off Request (With Approval) Status Transition on page 1736.

Note that the lifecycle of a write off request is driven by the business object using which the write off request is created. A write off request business object named **C1-WORequest** is shipped with the product. The write off request feature explained in this document is articulated based on the lifecycle and logic defined in the **C1-WORequest** business object.

For more information on how to setup the refund and write off request processes, see Prerequisites on page 1729.

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Prerequisites

To setup the refund request process, you need to do the following:

- Define the required adjustment types (for creating refund adjustments) where A/P request type is defined
- Define the required adjustment types (for creating write up adjustments) where A/P request type is not defined
- Define the required characteristic types where the characteristic entity is set to **Refund Write Off Request Type**
- Define the required characteristic types where the characteristic entity is set to **Refund Write Off Request**
- Define voided and rejected status reasons for the **C1-RefundReq** business object
- Assign the **C1-REFRQ** To Do type to a To Do role whose users must receive To Do generated while submitting a refund request for approval
- Define the required approval profiles with the credit hierarchy and **C1-REFRQ** To Do type
- Define an algorithm of the **C1-ADI-INFO** algorithm type and attach to the **Adjustment Information** system event in the **Algorithms** tab of the **Installation Options - Framework** screen
- Define the required refund request types in the system

To setup the write off request process, you need to do the following:

- Define the required adjustment types (for creating write off adjustments) where A/P request type is not defined
- Define the required characteristic types where the characteristic entity is set to **Refund Write Off Request Type**
- Define the required characteristic types where the characteristic entity is set to **Refund Write Off Request**
- Define cancelled and rejected status reasons for the **C1-WORequest** business object
- Assign the **C1-WOREQ** To Do type to a To Do role whose users must receive To Do generated while submitting a write off request for approval
- Define the required approval profiles with the debit hierarchy and **C1-WOREQ** To Do type
- Define an algorithm of the **C1-ADI-INFO** algorithm type and attach to the **Adjustment Information** system event in the **Algorithms** tab of the **Installation Options - Framework** screen
- Define the required write off request types in the system

Refund Request (Without Approval) Status Transition

The following figure graphically indicates how a refund request moves from one status to another when approval workflow is off:

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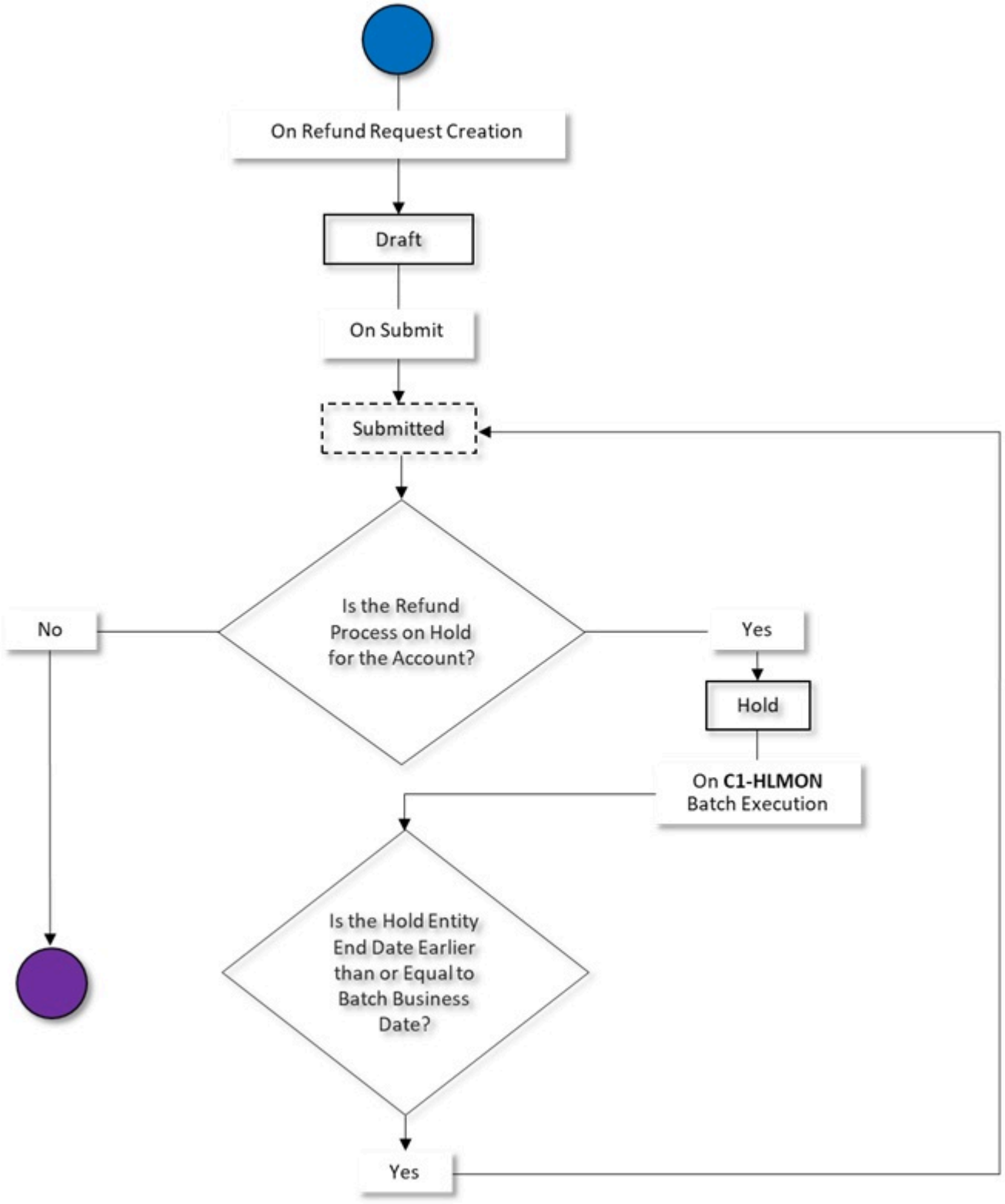

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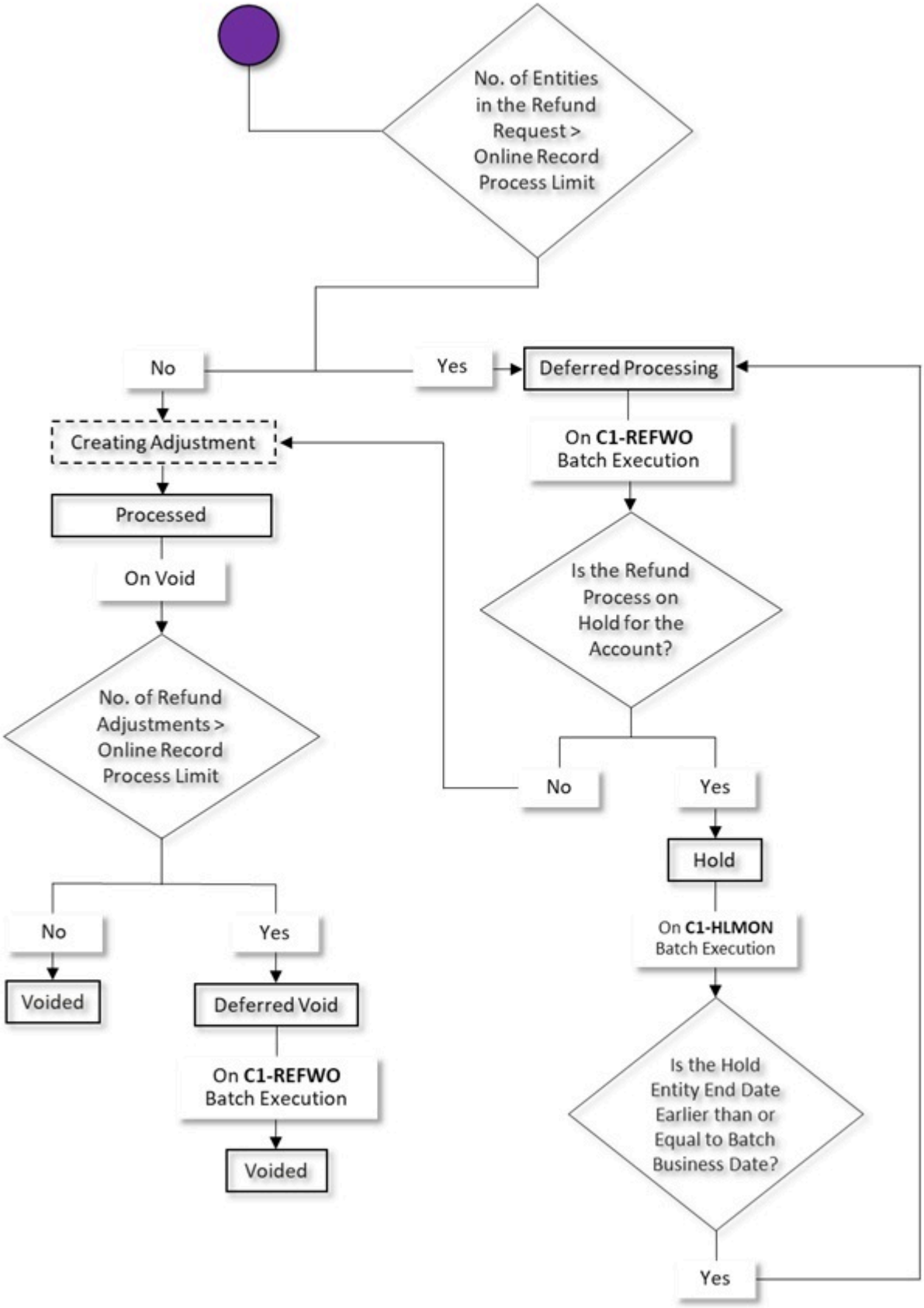

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Refund Request (With Approval) Status Transition

The following figure graphically indicates how a refund request moves from one status to another when approval workflow is on:

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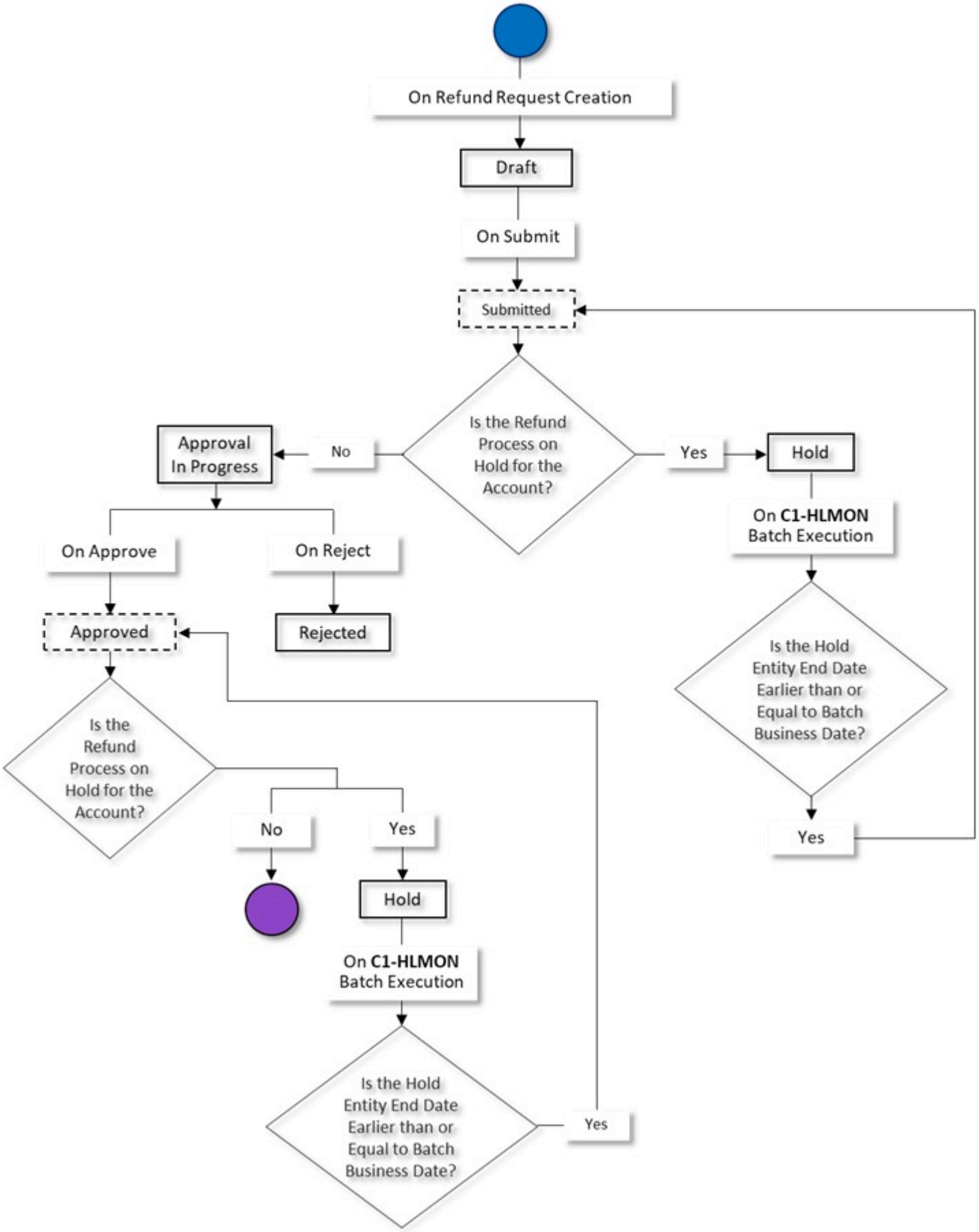

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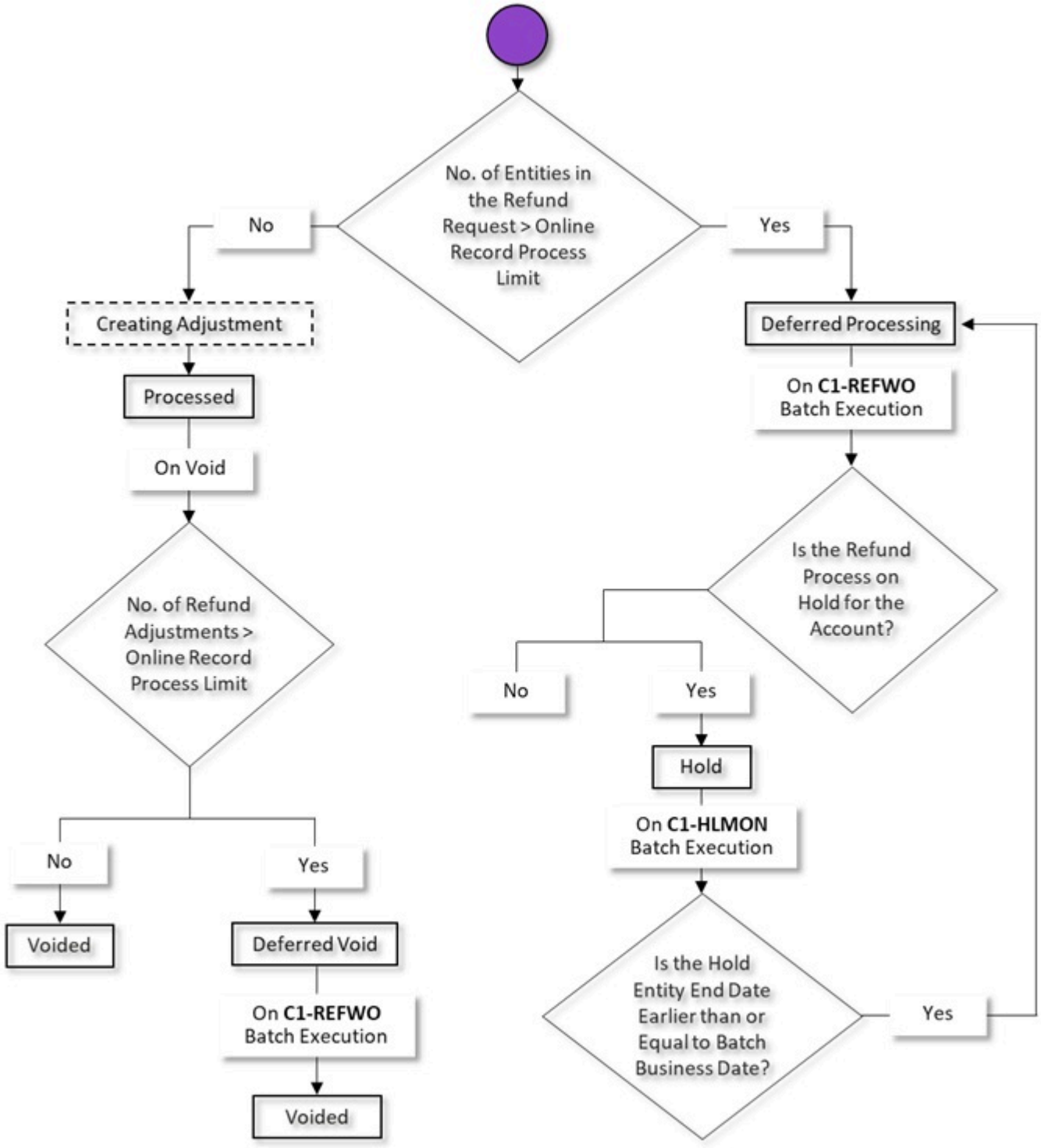

Write Off Request (Without Approval) Status Transition

The following figure graphically indicates how a write off request moves from one status to another when approval workflow is off:

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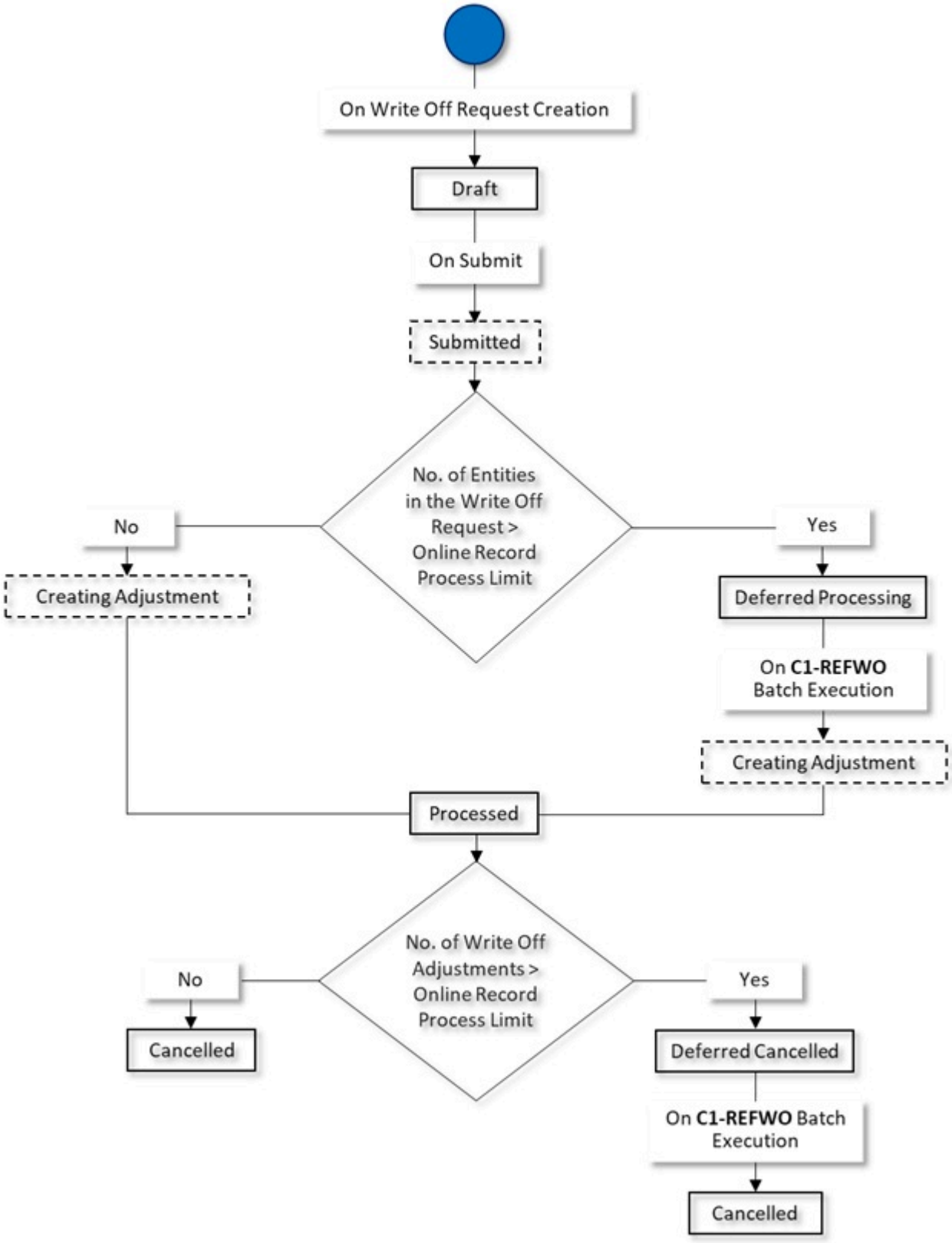

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Write Off Request (With Approval) Status Transition

The following figure graphically indicates how a write off request moves from one status to another when approval workflow is on:

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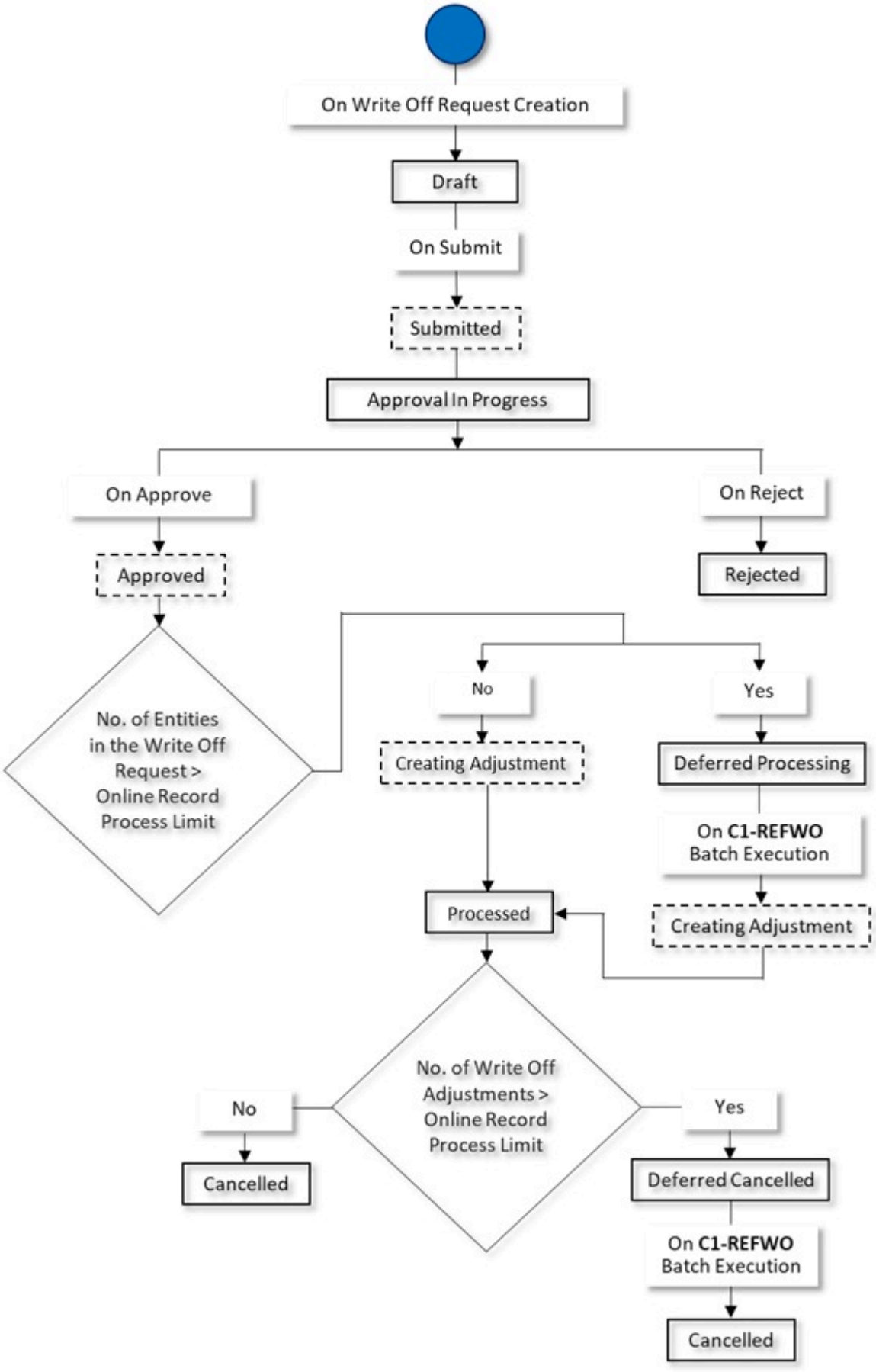

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Account Level Refund/Write Off

Oracle Revenue Management and Billing enables you to create a refund/write off request at the account level. A new field named **Adjustment Level** is available while defining a refund/write off request. It allows you to control how the refund/write off adjustment should be created for the refund/write off request. It supports the following values:

- **Account** - Used when you want to create the refund/write off request at the account level. Here, the refund/write off adjustment is created against the netting contract of the account. This option is only applicable for the health insurance domain.
- **Bill** - Used when you want to create the refund/write off request for a bill. Here, the refund/write off adjustment is created against the netting contract of the account. This option is only applicable for the financial services domain.
- **Segment** - Used when you want to create the refund/write off request for a bill, bill segment, adjustment, or payment of an account. Here, the refund/write off adjustment is created against the bill segment, adjustment, or payment segment, respectively. If you select this option, the system behaves in the traditional manner.

If you do not specify the value for the **Adjustment Level** field, the system considers the value defined in the **Default Adjustment Level** option type of the **C1_REFWO** feature configuration. If you select the **Account** option from the **Adjustment Level** list, the system checks the account balance while creating the refund/write off request. If the account balance is zero, the system throws an appropriate error message and does not allow you to create the refund/write off request at the account level. However, if the account balance is in credit, the system allows you to create a refund request for the account. Similarly, if the account balance is in debit, the system allows you to create a write off request for the account.

While creating a refund/write off request at the account level, the system, by default, sets the total refund/write off amount to the account balance. You cannot edit the refund/write off amount. Even, the post processing algorithms cannot update the refund/write off amount in the refund/write off request.

Note: The **Bills** and **Payments and Adjustments** tabs do not appear in the **Refund Request** and **Write Off Request** screens when the refund/write off request is created at the account level.

Before creating the refund/write off request at the account level, you need to do the following:

- Attach the **C1-NTACBAL** algorithm to the **Netting Account Balance** system event in the **Algorithms** tab of the **Installation Options - Framework** screen
- Set the netting contract type on the respective refund/write off request type

The system invokes the **C1-NTACBAL** algorithm while processing the refund/write off request where the adjustment level is set to **Account**. The **C1-NTACBAL** algorithm creates transfer adjustments on the netting contract of the account. The transfer adjustment creation process slightly varies depending on the adjustment level that is selected while defining a refund/write off request.

If the adjustment level is set to **Account**, the system checks whether a netting contract created using the netting contract type (specified in the refund/write off request type) exists for the account. If so, the system considers the unmatched financial transactions of the account and then creates a transfer adjustment against each of them on the netting contract. However, if the netting contract does not exist for the account, then the system does the following:

1. Creates a netting contract using the netting contract type specified in the refund/write off request type
2. Considers the unmatched financial transactions of the account and then creates a transfer adjustment against each of them on the netting contract

You can opt to exclude unmatched financial transactions of contracts created using a particular contract type by setting the **Excluded Contract types for netting** option type of the **C1_CMO** feature configuration. You can exclude multiple contract types by defining the **Excluded Contract types for netting** option type multiple times (with unique sequence number) in the feature configuration. This option type is considered only when the adjustment level is set to **Account**.

On submitting or approving a refund/write off request at the account level, the system validates whether the refund/write off amount matches the current account balance. If the refund/write off amount does not match the current account balance, the system does not allow you to process the refund/write off request. However, if the refund/write off amount

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matches the current account balance, the system creates the transfer adjustments and refund/write off adjustment on the netting contract of the account.

On voiding a refund request where the adjustment level is set to **Account**, the system cancels the transfer adjustments and refund adjustment on the netting contract of the account. And, on canceling a write off request where the adjustment level is set to **Account**, the system cancels the transfer adjustments and write off adjustment on the netting contract of the account.

Refund/Write Off Adjustment at Bill Level

Until now, you were able to create the refund/write off request for a bill or bill line item (i.e. bill segment or adjustment) of an account. On processing the refund/write off request, the system used to create refund/write off adjustment against the bill line item irrespective of whether the refund/write off is done at the bill or bill line item level. There was a requirement wherein the system should allow to create the refund/write off adjustment against the bill and not against the bill line items when the refund/write off is done at the bill level.

Now, Oracle Revenue Management and Billing enables you to create a refund/write off adjustment at the bill level. A new field named **Adjustment Level** is available while defining a refund/write off request. It allows you to control how the refund/write off adjustment should be created for the refund/write off request. It supports the following values:

- **Account** - Used when you want to create the refund/write off request at the account level. Here, the refund/write off adjustment is created against the netting contract of the account. This option is only applicable for the health insurance domain.
- **Bill** - Used when you want to create the refund/write off request for a bill. Here, the refund/write off adjustment is created against the netting contract of the account. This option is only applicable for the financial services domain.
- **Segment** - Used when you want to create the refund/write off request for a bill, bill segment, adjustment, or payment of an account. Here, the refund/write off adjustment is created against the bill segment, adjustment, or payment segment, respectively. If you select this option, the system behaves in the traditional manner.

By default, the adjustment level is set to **Segment**. If you select the **Bill** option from the **Adjustment Level** list, the system checks the account balance while creating the refund/write off request. If the account balance is zero, the system throws an appropriate error message and does not allow you to create the refund/write off request for the account. However, if the account balance is in credit, the system allows you to create a refund request for the account. Similarly, if the account balance is in debit, the system allows you to create a write off request for the account.

Note: The **Payments and Adjustments** tab does not appear in the **Refund Request** screen when the adjustment level is set to **Bill** in the refund request.

Before creating the refund/write off request where the adjustment level is set to **Bill**, you need to do the following:

- Attach the **C1-NTACBAL** algorithm to the **Netting Account Balance** system event in the **Algorithms** tab of the **Installation Options - Framework** screen
- Set the netting contract type on the respective refund/write off request type

The system invokes the **C1-NTACBAL** algorithm while processing the refund/write off request where the adjustment level is set to **Bill**. The **C1-NTACBAL** algorithm creates transfer adjustments on the netting contract of the account. The transfer adjustment creation process slightly varies depending on the adjustment level that is selected while defining a refund/write off request.

If the adjustment level is set to **Bill**, then the system checks whether a netting contract created using the netting contract type (specified in the refund/write off request type) exists for the account and its contract balance is equal to zero. If both the conditions are met, the system considers the unpaid bill segments and adjustments of the bill and then creates a transfer adjustment against each of them on the netting contract. However, if the netting contract does not exist for the account, then the system does the following:

1. Creates a netting contract using the netting contract type specified in the refund/write off request type
2. Considers the unpaid bill segments and adjustments of the bill and then creates a transfer adjustment against each of them on the netting contract

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And, if the netting contract exists for the account, but its contract balance is not equal to zero, the system throws an appropriate error message on the user interface.

On voiding a refund request where the adjustment level is set to **Bill**, the system cancels the transfer adjustments and refund adjustment on the netting contract of the account. And, on canceling a write off request where the adjustment level is set to **Bill**, the system cancels the transfer adjustments and write off adjustment on the netting contract of the account.

Algorithms Used in C1-RefundReq

The following table lists the algorithms which are attached to the **C1-RefundReq** business object:

System Event	Algorithm	Algorithm Type	Description
Information	C1-REFREQINF	C1-REFREQINF	Refer to C1-REFREQINF on page 1741
Post-Processing	C1-REFWOPOSP	C1-REFWOPOSP	Refer to C1-REFWOPOSP on page 1741
Pre-Processing	C1-REFWOPRE	C1-REFWOPRE	Refer to C1-REFWOPRE on page 1741
Validation	C1-REFUNDVAL	C1-REFUNDVAL	Refer to C1-REFUNDVAL on page 1741

The following table lists the algorithms which are used in the lifecycle of the **C1-RefundReq** business object:

Status	System Event	Algorithm	Algorithm Type	Description
Draft	Enter	C1-REF-DFT	C1-REF-DFT	Refer to C1-REF-DFT on page 1741
Submitted	Enter	C1-REFUNDSUB	C1-REFUNDSUB	Refer to C1-REFUNDSUB on page 1742
	Enter	C1-DEFERREF	C1-DEFERREF	Refer to C1-DEFERREF on page 1742
Hold	-	-	-	-
Approval In Progress	Enter	C1-REFUNDAPP	C1-REFUNDAPP	Refer to C1-REFUNDAPP on page 1742
	Enter	C1-DEFERREF	C1-DEFERREF	Refer to C1-DEFERREF on page 1742
Approved	Enter	C1-REFAPPRVD	C1-REFAPPRVD	Refer to C1-REFAPPRVD on page 1742
	Enter	C1-DEFERREF	C1-DEFERREF	Refer to C1-DEFERREF on page 1742
Rejected	Enter	C1-REFAPPREJ	C1-REFAPPREJ	Refer to C1-REFAPPREJ on page 1742
	Enter	C1-REJREQ	C1-REJREQ	Refer to C1-REJREQ on page 1746
Deferred Processing	Monitor	C1-REFCKHLD	C1-REFCKHLD	Refer to C1-REFCKHLD on page 1743
Creating Adjustment	Monitor	F1-AT-RQJ	F1-AT-RQJ	Refer to F1-AT-RQJ on page 225
	Enter	C1-REFADJCRI	C1-REFADJCRI	Refer to C1-REFADJCRI on page 1743
Processed	-	-	-	-
Deferred Void	Monitor	F1-AT-RQJ	F1-AT-RQJ	Refer to F1-AT-RQJ on page 225

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Status	System Event	Algorithm	Algorithm Type	Description
	Enter	C1-DEFERVOID	C1-DEFERVOID	Refer to C1-DEFERVOID on page 1743
Voided	Enter	C1-REFVOID	C1-REFVOID	Refer to C1-REFVOID on page 1744

C1-REFREQINF

This algorithm generates the refund and write off request information string which appears throughout the application. It concatenates the following fields:

- Refund or Write Off Request Type Description
- Refund or Write Off Request Status Description
- Refund or Write Off Request ID

C1-REFWOPOSP

This algorithm recalculates and updates the total refund amount in the **Refund Request** zone when you change the refund amount against an entity while editing a refund request.

C1-REFWOPRE

This algorithm is used to avoid the concurrency issue for refund and write off.

C1-REFUNDVAL

This algorithm validates the following for each entity that you have selected in the refund request:

- The mandatory data, such as refund amount and adjustment type, is specified.
- The refund amount is not less than zero.
- The refund amount is not greater than the entity amount.
- The refund amount is not greater than the eligible refund amount.
- The partial refund is not done at the payment event or bill level.

C1-REF-DFT

This algorithm fetches the account's main customer's name and address and displays in the **Refund Request** zone. In addition, when you refund the payments from the **Payment Event Summary** screen, this algorithm does the following:

- The total eligible refund amount is calculated and accordingly displayed in the **Refund Request** screen.
- The default refund adjustment type specified in the refund request type is fetched and displayed against the selected payment event or payments.
- On selecting a payment event for refund, if all payments in the payment event are matched against the same suspense or excess credit contract, the payment event is added in the **Refund Details** zone. However, if the payments in the payment event are matched against different suspense or excess credit contracts, the payments of the payment event are added in the **Refund Details** zone.

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C1-REFUNDSUB

This algorithm checks the following:

- Whether the approval is required for the refund request. If the approval is required for a refund request, the status of the refund request is changed to **Approval In Progress**. However, if the approval is not required for a refund request, the status of the refund request is changed to **Creating Adjustment**.
- If the account on which the refund request is created is on an active hold request, then the status of the refund request is changed to **Hold**.
- At least one entity, such as payment event, payment, or credit bill line item (such as credit bill segment or adjustment) is selected in the refund request.
- Whether the approval profile attached to the refund request type has the credit hierarchy and **C1-REFRQ** To Do type is defined.

C1-DEFERREF

This algorithm is invoked when the status of the refund request is changed to **Submitted** or **Approved**. It checks whether the refund request must be processed in the real time (i.e. immediately) or in the deferred mode (i.e. in the background). If the number of valid records in the refund request does not exceed the online record process limit, the system changes the status of the refund request to **Processing**. However, if the number of valid records in the refund request exceeds the online record process limit, the system changes the status of the refund request to **Deferred Processing**.

This algorithm contains the following parameter:

- **Online Record Process Limit** - Used to indicate the maximum number of valid records you can process in the real time (i.e. immediately).

C1-REFUNDAPP

This algorithm creates the following:

- A To Do using the To Do type specified in the approval profile which is attached to the refund request type. The To Do is sent to the appropriate users in the approval hierarchy depending on whether hierarchical approval is required or not.
- A log entry is added when a To Do is created using the To Do type.

C1-REFAPPRVD

This algorithm creates the following:

- A To Do using the To Do Type specified in the approval profile which is attached to the refund request type. The To Do is sent to the appropriate users in the approval hierarchy depending on whether hierarchical approval is required or not.
- A log entry is added when a To Do is created using the To Do Type.

C1-REFAPPREJ

This algorithm is executed when the refund request is rejected. It contains the following parameter:

- **To Do Type** - A To Do using the To Do type specified in the algorithm is created. The To Do is sent to the request submitter once the request is rejected by the approver.

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C1-REFCKHLD

This new algorithm is triggered by the monitor batch on the **Deferred Processing** status of the refund request business object. It checks if the account getting processed is on hold for refund process. If yes, then it will move the refund request status to **Hold** or else it will move to **Creating Adjustments** status.

F1-AT-RQJ

This algorithm transitions the current status of the business object to the specified status. It contains the following parameters:

- **Next Status** – Used when you want to override the default next status specified in the lifecycle.
- **Next Transition Condition** – Used when you want to override the default next transition condition specified in the lifecycle.

At a time, you can specify value for either the **Next Status** or **Next Transition Condition** parameter. If you don't specify any value for these parameters, the system will transition the business object to the default next status specified in its lifecycle.

C1-REFADJCRI

This algorithm does the following:

- Creates the refund adjustments for the refund request. These refund adjustments are created in the **Frozen** status. The adjustment ID is displayed corresponding to the entity in the **Refund Details** zone.
- Stamps the bill ID of credit line item on the adjustment and the corresponding financial transaction.
- If a match event is present for the credit bill line item and for payments which are matched against the excess credit contract, the existing match event is stamped on the refund or write up adjustment and the corresponding financial transaction. However, when a match event is not present for payments which are matched against the suspense contract or if the match event does not exist, a new match event is created and stamped on the refund or write up adjustment and the corresponding financial transaction.
- The details of the refund adjustments are added in the **A/P Check Request (CI_ADJ_APREQ)** table.
- If a write up adjustment is created, the write up adjustment type specified in the refund request type is displayed corresponding to the entity in the **Refund Details** zone.
- If you are doing a partial refund for payment, it will cancel original payment and create two new partial payments.
- Original payment will be cancelled using the cancel reason passed as algorithm soft parameter.
- Match Event Id of cancelled payment will be stamped on refund adjustment and the match event will be balanced.

C1-DEFERVOID

This algorithm is invoked when the status of the refund request is changed from **Processed** to **Deferred Void**. It checks whether the refund request must be processed in the real time (i.e. immediately) or in the deferred mode (i.e. in the background). If the number of distinct adjustments in the refund request does not exceed the online record process limit, the system changes the status of the refund request to **Void**. However, if the number of valid records in the refund request exceeds the online record process limit, the system keeps the status of the refund request as **Deferred Void**.

This algorithm contains the following parameter:

- **Online Record Process Limit** - Used to indicate the maximum number of distinct adjustments in a refund write off request you can process in the real time (i.e. immediately).

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C1-REFVOID

This algorithm is invoked on click of void button for a processed refund request. t cancels all frozen adjustments created for the request. The algorithm looks for the adjustment cancel reason required for cancelling the adjustments in the status reason characteristics (**F1_BUS_OBJ_STATUS_RSN_CHAR** table). If it is not found, it will use the status reason as selected by the user.

Algorithms Used in C1-WORequest

The following table lists the algorithms which are attached to the **C1-WORequest** business object:

System Event	Algorithm	Algorithm Type	Description
Information	C1-REFREQINF	C1-REFREQINF	Refer to C1-REFREQINF on page 1741
Post-Processing	C1-WOPOSP	C1-WOPOSP	Refer to C1-WOPOSP on page 1745
Pre-Processing	C1-REFWOPRE	C1-REFWOPRE	Refer to C1-REFWOPRE on page 1741
Validation	C1-WOBOVAL	C1-WOBOVAL	Refer to C1-WOBOVAL on page 1745

The following table lists the algorithms which are used in the lifecycle of the **C1-WORequest** business object:

Status	System Event	Algorithm	Algorithm Type	Description
Draft	Enter	C1-WODRAFT	C1-WODRAFT	Refer to C1-WODRAFT on page 1745
Submitted	Enter	C1-WOSUBMIT	C1-WOSUBMIT	Refer to C1-WOSUBMIT on page 1745
	Enter	C1-DEFERWO	C1-DEFERWO	Refer to C1-DEFERWO on page 1746
Approval In Progress	Enter	C1-WOAPPROVL	C1-WOAPPROVL	Refer to C1-WOAPPROVL on page 1746
	Enter	C1-DEFERWO	C1-DEFERWO	Refer to C1-DEFERWO on page 1746
Approved	Enter	C1-WOAPPROVD	C1-WOAPPROVD	Refer to C1-WOAPPROVD on page 1746
	Enter	C1-DEFERWO	C1-DEFERWO	Refer to C1-DEFERWO on page 1746
Rejected	Enter	C1-WOAPPREJ	C1-WOAPPREJ	Refer to C1-WOAPPREJ on page 1746
	Enter	C1-REJREQ	C1-REJREQ	Refer to C1-REJREQ on page 1746
Deferred Processing	Monitor	F1-AT-RQJ	F1-AT-RQJ	Refer to F1-AT-RQJ on page 225
Creating Adjustment	Enter	C1-WOADJCRT	C1-WOADJCRT	Refer to C1-WOADJCRT on page 1747
Processed	-	-	-	-

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Status	System Event	Algorithm	Algorithm Type	Description
Deferred Cancel	Enter	C1-DEFERVOID	C1-DEFERVOID	Refer to C1-DEFERVOID on page 1743
	Monitor	F1-AT-RQJ	F1-AT-RQJ	Refer to F1-AT-RQJ on page 225
Cancelled	Enter	C1-WOCANCEL	C1-WOCANCEL	Refer to C1-WOCANCEL on page 1747

C1-REFREQINF

This algorithm generates the refund and write off request information string which appears throughout the application. It concatenates the following fields:

- Refund or Write Off Request Type Description
- Refund or Write Off Request Status Description
- Refund or Write Off Request ID

C1-WOPOSP

This algorithm validates the following for each entity that you have selected in the write off request:

- The mandatory data, such as write off amount and adjustment type, is specified.
- The write off amount is not less than zero.
- The write off amount is not greater than the entity amount.
- The write off amount is not greater than the eligible write off amount.
- The partial write off is not done at the bill level.
- The A/P Request Type is not defined in the selected adjustment type.

C1-REFWOPRE

This algorithm is used to avoid the concurrency issue for refund and write off.

C1-WOBOVAL

This algorithm performs validations for a write off request when the user clicks the **Edit** or **Save** button. It validates the write off amount to ensure that it is less than or equal to the eligible write off amount.

C1-WODRAFT

This algorithm is invoked when a new write off request is created on click of **Save** button and status is **Draft**.

C1-WOSUBMIT

This algorithm checks the following:

- Whether the approval is required for the write off request. If the approval is required for a write off request, the status of the write off request is changed to **Approval In Progress**. However, if the approval is not required for a write off request, the status of the write off request is changed to **Creating Adjustment**.

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- At least one debit bill line item (such as debit bill segment or adjustment) is selected in the write off request.
- Whether the approval profile attached to the write off request type has the debit hierarchy and C1-WOREQ To Do type defined.

C1-DEFERWO

This algorithm is invoked when the status of the write off request is changed to **Submitted** or **Approved**. It checks whether the write off request must be processed in the real time (i.e. immediately) or in the deferred mode (i.e. in the background). If the number of valid records in the write off request does not exceed the online record process limit, the system changes the status of the write off request to **Processing**. However, if the number of valid records in the write off request exceeds the online record process limit, the system changes the status of the write off request to **Deferred Processing**. This algorithm contains the following parameter:

- **Online Record Process Limit** - Used to indicate the maximum number of valid records you can process in the real time (i.e. immediately).

C1-WOAPPROVL

This algorithm creates the following:

- A To Do using the To Do type specified in the approval profile which is attached to the write off request type. The To Do is sent to the appropriate users in the approval hierarchy depending on whether hierarchical approval is required or not.
- A log entry is added when a To Do is created using the To Do type.

C1-WOAPPROVD

This algorithm is triggered when the approver clicks the **Approve** button. It checks whether the approval is required from users at the next level in the approval hierarchy. If the approval is required from the next level in the approval hierarchy, the status of the write off request is changed to **Approval In Progress** and the algorithm attached to the **Approval In Progress** status is invoked. If further approval is not required, the status of the write off request is changed to **Creating Adjustment**.

C1-WOAPPREJ

This algorithm is executed when the refund request is rejected. It contains the following parameter:

- **To Do Type** - A To Do using the To Do type specified in the algorithm is created. The To Do is sent to the request submitter once the request is rejected by the approver.

C1-REJREQ

This algorithm will Update refund/Write off instruction with the reason codes for request rejection when approver rejects a request.

F1-AT-RQJ

This algorithm transitions the current status of the business object to the specified status. It contains the following parameters:

- **Next Status** – Used when you want to override the default next status specified in the lifecycle.

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- **Next Transition Condition** – Used when you want to override the default next transition condition specified in the lifecycle.

At a time, you can specify value for either the **Next Status** or **Next Transition Condition** parameter. If you don't specify any value for these parameters, the system will transition the business object to the default next status specified in its lifecycle.

C1-WOADJCRT

This algorithm does the following:

- Creates the write off adjustments for the write off request. These write off adjustments are created in the **Frozen** status. The adjustment ID is displayed corresponding to the entity in the **Write Off Details** zone.
- Stamps the bill ID of debit line item on the adjustment and the corresponding financial transaction.
- If a match event is present for the debit bill line item, the existing match event is stamped on the write off adjustment and the corresponding financial transaction. However, if the match event does not exist, a new match event is created and stamped on the write off adjustment and the corresponding financial transaction.
- If you are doing a partial write off for any entity, the corresponding match event status is set to **Open**. However, if the entire eligible amount is written off, the corresponding match event status is set to **Balanced**.

C1-WOCANCEL

This algorithm is invoked on click of the **Cancel** button for a write off request which is in the **Processed** state. It cancels all the frozen adjustments created for the write off request. The algorithm extracts the adjustment cancel reason required for cancelling the adjustments in the status reason characteristics (**F1_BUS_OBJ_STATUS_RSN_CHAR** table). If the reason is not found, it will use the status reason selected by the user.

Refund/Write Off Request Type

Oracle Revenue Management and Billing allows you to define:

- **Refund Request Type** - It is used to create a refund request. You can define multiple refund request types in the system. A refund request type helps the system to determine:
  - Whether the refund request must be approved before creating refund adjustments in the system
  - Approval profile using which the refund request must be approved
  - Whether multi-level or single-level approval is required while creating refund adjustments in the system
  - Tolerance limit for refund (i.e. minimum refund amount)
  - Adjustment type using which the write up adjustment must be created when the total refund amount is less than the minimum refund amount
  - Default adjustment type using which refund adjustments must be created
- **Write Off Request Type** - It is used to create a write off request. You can define multiple write off request types in the system. A write off request type helps the system to determine:
  - Whether the write off request must be approved before creating write off adjustments in the system
  - Approval profile using which the write off request must be approved
  - Whether multi-level or single-level approval is required while creating write off adjustments in the system
  - Default adjustment type using which write off adjustments must be created

While defining a refund or write off request type where approval workflow is required, you need to select the **Approval Required** check box. If the **Approval Required** check box is selected, the refund or write off request (which is created using the refund or write off request type) is sent for approval before creating the refund or write off adjustments. However, if the **Approval Required** check box is not selected, the refund or write off adjustments are created immediately on submitting a refund or write off request. The approval process is configured through the approval profile.

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The approval profile allows you to define the approval hierarchy. You can define a debit and credit hierarchy in the approval profile using the threshold amount. The debit approval hierarchy is used for approving write off request and credit approval hierarchy is used for approving refund request. Therefore, while defining an approval profile for refund, you need to define credit hierarchy and set the To Do Type to **C1-REFRQ**. However, while defining an approval profile for write off, you need to define debit hierarchy and set the To Do Type to **C1-WOREQ**.

You can define an approval hierarchy where users with different To Do role at each level can approve or reject the refund or write off request. For example, you can define an approval profile called A1 with two levels of approval. At the first level, a user with the `Manager` To Do role will approve or reject the refund or write off request, and at the second level, a user with the `Senior Manager` To Do role will approve or reject the refund or write off request. On submitting a refund or write off request where approval is required, a notification in the form of To Do is sent to all users with the To Do role defined at the first level in the hierarchy. Once the request is approved at the first level, a notification is sent to all users with the To Do role defined at the next level in the hierarchy. This process continues till the approval is received from all levels in the hierarchy. Once users at all levels approve the refund or write off request, the refund or write off adjustments are created. However, if an approver at any level in the hierarchy rejects the request, the refund or write off adjustments are not created.

The approval hierarchy is controlled by the threshold amount. For example, you define an approval profile called A1 with two levels of approval - First Level (Threshold Amount: 300, To Do Role: `Manager`) and Second Level (Threshold Amount: 500, To Do Role: `Senior Manager`). Now, if the total refund or write off amount is equal to 300 or less than 500, then the approval is required only from the first level in the hierarchy and not from the second level in the hierarchy. However, if the total refund or write off amount is equal to or greater than 500, then the approval is required from the first level and then from the second level in the hierarchy. But, if the total refund or write off amount is less than 300, then the approval is not required from any levels in the hierarchy. The system will automatically approve the refund or write off request and create the refund or write off adjustments.

The system supports both single-level and multi-level approval process while approving refund or write off request. If the **Hierarchical Approval** check box is selected while defining a refund or write off request type, the approval hierarchy defined in the approval profile is followed based on the threshold limit. However, if the **Hierarchical Approval** check box is not selected while defining a refund or write off request type, the approval is required only from the approval level where the total refund or write off amount falls within the threshold limit. Let us understand this with the help of some examples.

Example 1

<table>
<tr><th>Refund Request Type</th><th>Approval Profile</th><th>Approval Hierarchy</th><th>Hierarchical Approval</th></tr>
<tr><td>R1</td><td>Refund Analyst</td><td>Credit Hierarchy
<table>
<tr><th>Threshold Amount</th><th>To Do Role</th></tr>
<tr><td>$500</td><td>Senior Analyst</td></tr>
<tr><td>$750</td><td>Manager</td></tr>
<tr><td>$1500</td><td>Senior Manager</td></tr>
</table></td><td>Yes</td></tr>
<tr><td>R2</td><td>Refund Analyst</td><td>Credit Hierarchy
<table>
<tr><th>Threshold Amount</th><th>To Do Role</th></tr>
<tr><td>$500</td><td>Senior Analyst</td></tr>
<tr><td>$750</td><td>Manager</td></tr>
<tr><td>$1500</td><td>Senior Manager</td></tr>
</table></td><td>No</td></tr>
</table>

The following table indicates how the system will behave in different refund scenarios:

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Refund Request	Refund Request Type	Total Refund Amount ($)	Comments
RR1	R1	200	This refund request is automatically approved by the system because the total refund amount is less than $500.
RR2	R1	750	The To Do is sent for approval to the following users in the specified order: **1.** Users with the `Senior Analyst` To Do role **2.** Users with the `Manager` To Do role This is because the total refund amount is either equal to $750 or less than $1500 and hierarchical approval is required.
RR3	R1	2000	The To Do is sent for approval to the following users in the specified order: **1.** Users with the `Senior Analyst` To Do role **2.** Users with the `Manager` To Do role **3.** Users with the `Senior Manager` To Do role This is because the total refund amount is greater than $1500 and hierarchical approval is required.
RR4	R2	200	This refund request is automatically approved by the system because the total refund amount is less than $500.
RR5	R2	750	The To Do is sent for approval to users with the `Manager` To Do role. This is because the total refund amount is either equal to $750 or less than $1500 and hierarchical approval is not required.
RR6	R2	2000	The To Do is sent for approval to users with the `Senior Manager` To Do role. This is because the total refund amount is greater than $1500 and hierarchical approval is not required.

Example 2

Write Off Request Type	Approval Profile	Approval Hierarchy	Hierarchical Approval
W1	Write Off Analyst	**Debit Hierarchy** **Threshold Amount** / **To Do Role** $100 / Senior Analyst $200 / Manager $300 / Senior Manager	Yes
W2	Write Off Analyst	**Debit Hierarchy** **Threshold Amount** / **To Do Role** $100 / Senior Analyst $200 / Manager	No

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Write Off Request Type	Approval Profile	Approval Hierarchy		Hierarchical Approval
		Threshold Amount	**To Do Role**	
		$300	Senior Manager	

The following table indicates how the system will behave in different write off scenarios:

Write Off Request	Write Off Request Type	Total Write Off Amount ($)	Comments
WO1	W1	90	This write off request is automatically approved by the system because the total write off amount is less than $100.
WO2	W1	250	The To Do is sent for approval to the following users in the specified order: **1.** Users with the `Senior Analyst` To Do role **2.** Users with the `Manager` To Do role This is because the total write off amount is either equal to $200 or less than $300 and hierarchical approval is required.
WO3	W1	500	The To Do is sent for approval to the following users in the specified order: **1.** Users with the `Senior Analyst` To Do role **2.** Users with the `Manager` To Do role **3.** Users with the `Senior Manager` To Do role This is because the total write off amount is greater than $300 and hierarchical approval is required.
WO4	W2	90	This write off request is automatically approved by the system because the total write off amount is less than $100.
WO5	W2	250	The To Do is sent for approval to users with the `Manager` To Do role. This is because the total write off amount is either equal to $200 or less than $300 and hierarchical approval is not required.
WO6	W2	500	The To Do is sent for approval to users with the `Senior Manager` To Do role. This is because the total write off amount is greater than $300 and hierarchical approval is not required.

The **Refund/Write Off Request Type** screen allows you to define, edit, delete, and copy a refund and write off request type. This screen consists of the following zones:

- Refund/Write Off Request Type List on page 1750
- Refund/Write Off Request Type on page 1751

Refund/Write Off Request Type List

The **Refund/Write Off Request Type List** zone lists the refund and write off request types that are already defined in the system. It contains the following columns:

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Column Name	Column Description
Refund/Write Off Request Type	Displays the refund or write off request type.
Description	Displays the description of the refund or write off request type.
Edit	On clicking the **Edit** (✎) icon, the **Refund/Write Off Request Type** screen appears where you can edit the details of the refund and write off request type.
Duplicate	On clicking the **Duplicate** (⧉) icon, the **Refund/Write Off Request Type** screen appears where you can define a refund and write off request type using an existing refund and write off request type.
Delete	On clicking the **Delete** (🗑) icon, you can delete the refund or write off request type.
	Note: You can delete a refund or write off request type only when a refund or write off request is not yet created using the refund or write off request type.

On clicking the **Broadcast** (📡) icon corresponding to refund or write off request type, the **Refund/Write Off Request Type** zone appears with the details of the respective refund or write off request type.

Related Topics

For more information on...	See...
How to edit a refund or write off request type	Editing a Refund or Write Off Request Type on page 1759
How to copy a refund or write off request type	Copying a Refund or Write Off Request Type on page 1762
How to delete a refund or write off request type	Deleting a Refund or Write Off Request Type on page 1766
How to view the details of a refund or write off request type	Viewing the Refund or Write Off Request Type Details on page 1767

Refund/Write Off Request Type

The **Refund/Write Off Request Type** zone displays the details of the refund or write off request type. It contains the following sections:

- **Main** - Displays the basic information about the refund or write off request type. It contains the following fields:

Field Name	Field Description
Refund/Write Off Request Type	Displays the refund or write off request type.
Refund/Write Off Request Business Object	Indicates the business object using which the refund or write off request should be created. In addition, a context menu (⊙) icon appears corresponding to this field which helps in navigating to other screens in the application.
	Note: It has a link. On clicking the link, the **Business Object** screen appears where you can view the details of the respective business object.
Description	Displays the description of the refund or write off request type.

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Field Name	Field Description
Detailed Description	Displays additional information about the refund or write off request type.
Status	Indicates the status of the refund or write off request type. The valid values are: • Active • Inactive
Action	Indicates the action which is performed on the refund or write off request using the refund or write off request type. The valid values are: • Refund • Write Off
Minimum Refund Amount	Displays the tolerance limit defined for a refund. **Note:** This field appears when the **Refund** option is selected from the **Action** list.
Write Up Adjustment Type	Indicates the adjustment type using which the write up adjustment is created when the total refund amount is less than the minimum refund amount. **Note:** This field appears when the **Refund** option is selected from the **Action** list. It has a link. On clicking the link, the **Adjustment Type** screen appears where you can view details of the respective write off adjustment type.
Approval Required	Indicates whether approval is required while creating the refund or write off adjustments using the refund or write off request type.
Approval Profile	Indicates the approval profile which must be used to define approval hierarchy for the refund or write off request type. **Note:** This field appears when the **Approval Required** option is selected. It has a link. On clicking the link, the **Approval Profile** screen appears where you can view details of the respective approval profile.
Hierarchical Approval	Indicates whether single-level or multi-level approval is required while defining a refund or write off request type. **Note:** This field appears when the **Approval Required** option is selected.
Adjustment Type	Indicates the adjustment type using which the refund or write off adjustments must be created. **Note:** It has a link. On clicking the link, the **Adjustment Type** screen appears where you can view details of the respective adjustment type.
Netting Contract Type	Indicates the contract type used for netting transactions while processing the refund or write-offs.

- **Characteristics** - This section lists the characteristics of the refund or write off request type. It contains the following columns:

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Column Name	Column Description
Characteristic Type	Indicates the characteristic type.
Characteristic Value	Displays the value of the characteristic type.

- **Record Actions** - This section contains the following buttons:

Button Name	Button Description
Edit	Used to edit the details of the refund or write off request type.
Delete	Used to delete the refund or write off request type.
	Note: You can delete a refund or write off request type when you have not created a refund or write off request using the refund or write off request type.
Duplicate	Used to create a new refund or write off request type using an existing refund or write off request type.

- **Record Information** - This section contains the following fields:

Field Name	Field Description
Business Object	Indicates the business object using which the refund or write off request type is created. In addition, a context menu (⊙) icon appears corresponding to this field which helps in navigating to other screens in the application.
	Note: It has a link. On clicking the link, the **Business Object** screen appears where you can view the details of the respective business object.

By default, the **Refund/Write Off Request Type** zone does not appear in the **Refund/Write Off Request Type** screen. It appears when you click the **Broadcast** (ᯤ) icon corresponding to the refund or write off request type in the **Refund/Write Off Request Type List** zone.

Related Topics

For more information on...	See...
How to define a refund or write off request type	Defining a Refund or Write Off Request Type on page 1753
How to edit a refund or write off request type	Editing a Refund or Write Off Request Type on page 1759
How to copy a refund or write off request type	Copying a Refund or Write Off Request Type on page 1762
How to delete a refund or write off request type	Deleting a Refund or Write Off Request Type on page 1766
How to view the details of a refund or write off request type	Viewing the Refund or Write Off Request Type Details on page 1767

Defining a Refund or Write Off Request Type

Prerequisites

To define a refund or write off request type, you should have:

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- Refund or Write Off request business objects defined in the application
- Approval profiles defined in the application
- Adjustment types with and without the A/P request type code defined in the application

Procedure

To define a refund or write off request type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **R** and then click **Refund/Write Off Request Type**.
   A sub-menu appears.
3. Click the **Add** option from the **Refund/Write Off Request Type** sub-menu.

   The **Select Business Object** screen appears. It contains the following field:

Field Name	Field Description	Mandatory (Yes or No)
Refund/Write Off Request Type Business Object	Used to indicate the business object using which you want to create the refund or write off request type. The valid value is: • **Refund/Write Off Request Type (i.e. C1-RefWoReqType)** - Enables you to maintain a refund or write off request type. **Note:** The above business object is shipped with the product. The list includes those business objects which are created using the **Refund/Write Off Request Type (i.e., C1-RFWORQTY)** maintenance object.	Yes

Tip: Alternatively, you can access the **Select Business Object** screen by clicking the **Add** button in the **Page Title** area of the **Refund/Write Off Request Type** screen.

Note: The **Select Business Object** screen appears when there are multiple refund and write off request type business objects defined in the application. If there is only one refund and write off request type business object defined in the application, the **Refund/Write Off Request Type** screen appears.

4. Select the required refund and write off request type business object from the respective field.
5. Click **OK**.

   The **Refund/Write Off Request Type** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details for the refund or write off request type.
   - **Characteristics** - Used to define the characteristics for the refund or write off request type.

   The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Refund/Write Off Request Type	Used to specify the refund or write off request type.	Yes
Business Object	Indicates the refund and write off request type business object using which you are defining the refund or write off request type.	Not applicable
Refund/Write Off Request Business Object	Used to indicate the business object using which you want to create the respective refund or write off request. The valid values are:	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	• **Refund Request (i.e. C1-RefundReq)** - Enables you to refund the bills and payments using a refund request type. • **Refund Request - Display BO (i.e. C1-RefundReq2** - Enables you to display the details of a refund request type. • **Write Off Request (i.e. C1-WORequest)** - Enables you to write off the bills using a write off request type. • **Write Off Request - Display BO (i.e. C1-WORequest2)** - Enables you to display the details of a write off request type.	
Description	Used to specify the description for the refund or write off request type.	Yes
Detailed Description	Used to specify additional information about the refund or write off request type.	No
Status	Used to indicate the status of the refund or write off request type. The valid values are: • Active • Inactive **Note:** You cannot change the status of a refund or write off request type to **Inactive** if there are refund or write off requests which are created using the refund or write off request type and are currently in the **Draft** or **Approval In Progress** status.	Yes
Action	Used to indicate whether the request type is created for refund or write off. The valid values are: • Refund • Write Off	Yes
Minimum Refund Amount	Used to specify the minimum refund amount. This field is used to define tolerance limit for refund. If the total refund amount in a refund request is less than the minimum refund amount, the system creates a write up adjustment. However, if the total refund amount in a refund request is equal to or greater than the minimum refund amount, the system creates a refund adjustment. **Note:** This field appears when the **Refund** option is selected from the **Action** list.	Yes
Write Up Adjustment Type	Used to indicate the adjustment type using which the write up adjustment must be created when the total refund amount is less than the minimum refund amount.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The **Search** (🔍) icon appears corresponding to the **Write Up Adjustment Type** field. On clicking the **Search** icon, the **Adjustment Type Search** window appears. On specifying the adjustment type, the description of the adjustment type appears corresponding to the **Write Up Adjustment Type** field. This field appears when the **Refund** option is selected from the **Action** list. You can create the write up adjustments (only using those adjustment types) where the **A/P Request Type Code** option is not set to **Refund**.	
Approval Required	Used to indicate whether approval is required while creating a refund or write off adjustment using the refund or write off request type.	No
Approval Profile	Used to indicate the approval profile using which the system should determine the debit or credit hierarchy level from where the approval is required. The system considers the debit or credit hierarchy level where the refund or write off amount of the debit or credit bill falls within the threshold limit. **Note:** This field appears when the **Approval Required** option is selected.	Yes (Conditional) **Note:** This field is required when the **Approval Required** option is selected.
Hierarchical Approval	Used to indicate whether multi-level or single-level approval is required while adding or updating a refund or write off adjustment using the refund or write off request type. **Note:** This field appears when the **Approval Required** option is selected.	No
Refund Adjustment Type	Used to indicate the adjustment type using which refund adjustment must be created. By default adjustment type appears when you select the payments or credit bill line items for refund. You can then change the adjustment type, if required, while editing a refund request.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The **Search** (🔍) icon appears corresponding to the **Refund Adjustment Type** field. On clicking the **Search** icon, the **Adjustment Type Search** window appears. On specifying the adjustment type, the description of the adjustment type appears corresponding to the **Refund Adjustment Type** field. This field appears when the **Refund** option is selected from the **Action** list. You can create refund adjustments (only using those adjustment types) where the **A/P Request Type Code** option is set to **Refund**.	
Write Off Adjustment Type	Used to indicate the adjustment type using which the write off adjustments must be created. This default adjustment type appears when you select the debit bill line items for write off. You can then change the adjustment type, if required, while editing a write off request. **Note:** The **Search** (🔍) icon appears corresponding to the **Refund Adjustment Type** field. On clicking the **Search** icon, the **Adjustment Type Search** window appears. On specifying the adjustment type, the description of the adjustment type appears corresponding to the **Refund Adjustment Type** field. This field appears when the **Write Off** option is selected from the **Action** list. You can create write off adjustments (only using those adjustment types) where the **A/P Request Type Code** option is not set to **Refund**.	Yes
Netting Contract Type	Used to indicate the contract type used for netting transactions while processing refunds or write-offs.	No

6. Enter the required details in the **Main** section.
7. Define characteristics for the refund or write off request type, if required.
8. Click **Save**.
   The refund or write off request type is defined.

Related Topics

For more information on...	See...
Refund/Write Off Request Type screen	Refund/Write Off Request Type on page 1747
How to define a characteristic for a refund or write off request type	Defining a Characteristic for a Refund or Write Off Request Type on page 1758

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Defining a Characteristic for a Refund or Write Off Request Type

Prerequisites

To define a characteristic for a refund or write off request type, you should have:

- Characteristic types defined in the application (where the characteristic entity is set to **Refund/Write Off Request Type**)

Procedure

To define a characteristic for a refund or write off request type:

1. Ensure that the **Characteristics** section is expanded when you are defining, editing, or copying a refund or *w*rite off request type.

   The **Characteristics** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Characteristic Type	Used to indicate the characteristic type.	Yes (Conditional)
	Note: The list includes only those characteristic types where the characteristic entity is set to **Refund/Write Off Request Type**.	**Note:** This field is required when you are defining a characteristic for the refund or write off request type.
Characteristic Value	Used to specify the value for the characteristic type.	Yes (Conditional)
	Note: If you select a predefined characteristic type, the **Search** (🔍) icon appears corresponding to the **Characteristic Value** field. On clicking the **Search** icon, you can search for a predefined characteristic value. On specifying the value for a predefined characteristic type, the description of the characteristic value appears corresponding to the **Characteristic Value** field.	**Note:** This field is required when you are defining a characteristic for the refund or write off request type.

2. Enter the required details in the **Characteristics** section.
3. If you want to define more than one characteristic for the refund or write off request type, click the **Add** (+) *i*con and then repeat step *2*.

Note: However, if you want to remove a characteristic from the refund or write off request type, click the **Delete** (🗑) icon corresponding to the characteristic.

Related Topics

For more information on...	See...
How to define a refund or write off request type	Defining a Refund or Write Off Request Type on page 1753
How to edit a refund or write off request type	Editing a Refund or Write Off Request Type on page 1759
How to copy a refund or write off request type	Copying a Refund or Write Off Request Type on page 1762

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Editing a Refund or Write Off Request Type

Prerequisites

To edit a refund or write off request type, you should have:

- Refund or Write Off request business objects defined in the application
- Approval profiles defined in the application
- Adjustment types with and without A/P request type code defined in the application

Procedure

To edit a refund or write off request type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **R** and then click **Refund/Write Off Request Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Refund/Write Off Request Type** sub-menu.
   The **Refund/Write Off Request Type** screen appears.
4. In the **Refund/Write Off Request Type List** zone, click the **Edit** (✎) icon in the **Edit** column corresponding *t*o the refund or write off request type whose details you want to edit.

   The **Refund/Write Off Request Type** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details for the refund or write off request type.
   - **Characteristics** - Used to define the characteristics for the refund or write off request type.

   The **Main** section contains the following fields:

Field Name	**Field Description**	**Mandatory (Yes or No)**
Refund/Write Off Request Type	Displays the refund or write off request type.	Not applicable
Business Object	Indicates the business object which is used while defining the refund or write off request type.	Not applicable
Refund/Write Off Request Business Object	Used to indicate the business object using which you want to create the respective refund or write off request. The valid values are: • **Refund Request (i.e. C1-RefundReq)** - Enables you to refund the bills and payments using a refund request type. • **Refund Request - Display BO (i.e. C1-RefundReq2** - Enables you to display the details of a refund request type. • **Write Off Request (i.e. C1-WORequest)** - Enables you to write off the bills using a write off request type. • **Write Off Request - Display BO (i.e. C1-WORequest2)** - Enables you to display the details of a write off request type.	Yes
Description	Used to specify the description for the refund or write off request type.	Yes
Detailed Description	Used to specify additional information about the refund or write off request type.	No

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Field Name	Field Description	Mandatory (Yes or No)
Status	Used to indicate the status of the refund or write off request type. The valid values are: • Active • Inactive **Note:** You cannot change the status of a refund or write off request type to **Inactive** if there are refund or write off requests which are created using the refund or write off request type and are currently in the **Draft** or **Approval In Progress** status.	Yes
Action	Indicates whether the request type is created for refund or write off. The valid values are: • Refund • Write Off **Note:** It is a read-only field.	Not applicable
Minimum Refund Amount	Used to specify the minimum refund amount. This field is used to define tolerance limit for refund. If the total refund amount in a refund request is less than the minimum refund amount, the system creates a write up adjustment. However, if the total refund amount in a refund request is equal to or greater than the minimum refund amount, the system creates a refund adjustment. **Note:** This field appears when the **Refund** option is selected from the **Action** list.	Yes
Write Up Adjustment Type	Used to indicate the adjustment type using which the write up adjustment must be created when the total refund amount is less than the minimum refund amount. **Note:** The **Search** (🔍) icon appears corresponding to the **Write Up Adjustment Type** field. On clicking the **Search** icon, the **Adjustment Type Search** window appears. On specifying the adjustment type, the description of the adjustment type appears corresponding to the **Write Up Adjustment Type** field. This field appears when the **Refund** option is selected from the **Action** list. You can create the write up adjustments (only using those adjustment types) where the **A/P Request Type Code** option is not set to **Refund**.	Yes
Approval Required	Used to indicate whether approval is required while creating a refund or write off adjustment using the refund or write off request type.	No

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Field Name	Field Description	Mandatory (Yes or No)
Approval Profile	Used to indicate the approval profile using which the system should determine the debit or credit hierarchy level from where the approval is required. The system considers the debit or credit hierarchy level where the refund or write off amount of the debit or credit bill falls within the threshold limit. **Note:** This field appears when the **Approval Required** option is selected.	Yes (Conditional) **Note:** This field is required when the **Approval Required** option is selected.
Hierarchical Approval	Used to indicate whether multi-level or single-level approval is required while adding or updating a refund or write off adjustment using the refund or write off request type. **Note:** This field appears when the **Approval Required** option is selected.	No
Refund Adjustment Type	Used to indicate the adjustment type using which refund adjustment must be created. By default adjustment type appears when you select the payments or credit bill line items for refund. You can then change the adjustment type, if required, while editing a refund request. **Note:** The **Search** (🔍) icon appears corresponding to the **Refund Adjustment Type** field. On clicking the **Search** icon, the **Adjustment Type Search** window appears. On specifying the adjustment type, the description of the adjustment type appears corresponding to the **Refund Adjustment Type** field. This field appears when the **Refund** option is selected from the **Action** list. You can create refund adjustments (only using those adjustment types) where the **A/P Request Type Code** option is set to **Refund**.	Yes
Write Off Adjustment Type	Used to indicate the adjustment type using which the write off adjustments must be created. This default adjustment type appears when you select the debit bill line items for write off. You can then change the adjustment type, if required, while editing a write off request.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The **Search** (🔍) icon appears corresponding to the **Refund Adjustment Type** field. On clicking the **Search** icon, the **Adjustment Type Search** window appears. On specifying the adjustment type, the description of the adjustment type appears corresponding to the **Refund Adjustment Type** field. This field appears when the **Write Off** option is selected from the **Action** list. You can create write off adjustments (only using those adjustment types) where the **A/P Request Type Code** option is not set to **Refund**.	
Netting Contract Type	Used to indicate the contract type used for netting transactions while processing refunds or write-offs.	No

Tip: Alternatively, you can click the **Edit** button in the **Refund/Write Off Request Type** zone to edit the details of the refund or write off request type.

5. Modify the required details in the **Main** section.
6. Define, edit, or remove characteristics of the refund or write off request type, if required.
7. Click **Save**.
   The changes made to the refund or write off request type are saved.

Related Topics

For more information on...	See...
Refund/Write Off Request Type screen	Refund/Write Off Request Type on page 1747
Refund/Write Off Request Type List zone	Refund/Write Off Request Type List on page 1750
Refund/Write Off Request Type zone	Refund/Write Off Request Type on page 1751
How to define a characteristic for a refund or write off request type	Defining a Characteristic for a Refund or Write Off Request Type on page 1758

Copying a Refund or Write Off Request Type

Instead of creating a refund or write off request type from scratch, you can create a new refund or write off request type using an existing refund or write off request type. This is possible through copying a refund or write off request type. On copying a refund or write off request type, the details including the characteristics are copied to the new refund or write off request type. You can then edit the details, if required.

Prerequisites

To copy a refund or write off request type, you should have:

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- Refund or Write Off request type (whose copy you want to create) defined in the application
- Refund or Write Off request business objects defined in the application
- Approval profiles defined in the application
- Adjustment types with and without A/P request type code defined in the application

Procedure

To copy a refund or write off request type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **R** and then click **Refund/Write Off Request Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Refund/Write Off Request Type** sub-menu.
   The **Refund/Write Off Request Type** screen appears.
4. In the **Refund/Write Off Request Type List** zone, click the **Duplicate** (⧉) icon in the **Duplicate** column corresponding to the refund or write off request type whose copy you want to create.

   The **Refund/Write Off Request Type** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details for the refund or write off request type.
   - **Characteristics** - Used to define the characteristics for the refund or write off request type.

   The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Refund/Write Off Request Type	Used to specify the refund or write off request type.	Yes
Business Object	Indicates the business object which is used while defining the refund or write off request type.	Not applicable
Refund/Write Off Request Business Object	Used to indicate the business object using which you want to create the respective refund or write off request. The valid values are: • **Refund Request (i.e. C1-RefundReq)** - Enables you to refund the bills and payments using a refund request type. • **Refund Request - Display BO (i.e. C1-RefundReq2** - Enables you to display the details of a refund request type. • **Write Off Request (i.e. C1-WORequest)** - Enables you to write off the bills using a write off request type. • **Write Off Request - Display BO (i.e. C1-WORequest2)** - Enables you to display the details of a write off request type.	Yes
Description	Used to specify the description for the refund or write off request type.	Yes
Detailed Description	Used to specify additional information about the refund or write off request type.	No
Status	Used to indicate the status of the refund or write off request type. The valid values are: • Active • Inactive	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	Note: You cannot change the status of a refund or write off request type to **Inactive** if there are refund or write off requests which are created using the refund or write off request type and are currently in the **Draft** or **Approval In Progress** status.	
Action	Used to indicate whether the request type is created for refund or write off. The valid values are: • Refund • Write Off	Yes
Minimum Refund Amount	Used to specify the minimum refund amount. This field is used to define tolerance limit for refund. If the total refund amount in a refund request is less than the minimum refund amount, the system creates a write up adjustment. However, if the total refund amount in a refund request is equal to or greater than the minimum refund amount, the system creates a refund adjustment. **Note:** This field appears when the **Refund** option is selected from the **Action** list.	Yes
Write Up Adjustment Type	Used to indicate the adjustment type using which the write up adjustment must be created when the total refund amount is less than the minimum refund amount. **Note:** The **Search** (🔍) icon appears corresponding to the **Write Up Adjustment Type** field. On clicking the **Search** icon, the **Adjustment Type Search** window appears. On specifying the adjustment type, the description of the adjustment type appears corresponding to the **Write Up Adjustment Type** field. This field appears when the **Refund** option is selected from the **Action** list. You can create the write up adjustments (only using those adjustment types) where the **A/P Request Type Code** option is not set to **Refund**.	Yes
Approval Required	Used to indicate whether approval is required while creating a refund or write off adjustment using the refund or write off request type.	No
Approval Profile	Used to indicate the approval profile using which the system should determine the debit or credit hierarchy level from where the approval is required. The system considers the debit or credit hierarchy level where the refund or write off amount of the debit or credit bill falls within the threshold limit. **Note:** This field appears when the **Approval Required** option is selected.	Yes (Conditional) **Note:** This field is required when the **Approval Required** option is selected.

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Field Name	Field Description	Mandatory (Yes or No)
Hierarchical Approval	Used to indicate whether multi-level or single-level approval is required while adding or updating a refund or write off adjustment using the refund or write off request type. **Note:** This field appears when the **Approval Required** option is selected.	No
Refund Adjustment Type	Used to indicate the adjustment type using which refund adjustment must be created. By default adjustment type appears when you select the payments or credit bill line items for refund. You can then change the adjustment type, if required, while editing a refund request. **Note:** The **Search** (🔍) icon appears corresponding to the **Refund Adjustment Type** field. On clicking the **Search** icon, the **Adjustment Type Search** window appears. On specifying the adjustment type, the description of the adjustment type appears corresponding to the **Refund Adjustment Type** field. This field appears when the **Refund** option is selected from the **Action** list. You can create refund adjustments (only using those adjustment types) where the **A/P Request Type Code** option is set to **Refund**.	Yes
Write Off Adjustment Type	Used to indicate the adjustment type using which the write off adjustments must be created. This default adjustment type appears when you select the debit bill line items for write off. You can then change the adjustment type, if required, while editing a write off request. **Note:** The **Search** (🔍) icon appears corresponding to the **Refund Adjustment Type** field. On clicking the **Search** icon, the **Adjustment Type Search** window appears. On specifying the adjustment type, the description of the adjustment type appears corresponding to the **Refund Adjustment Type** field. This field appears when the **Write Off** option is selected from the **Action** list. You can create write off adjustments (only using those adjustment types) where the **A/P Request Type Code** option is not set to **Refund**.	Yes
Netting Contract Type	Used to indicate the contract type used for netting transactions while processing refunds or write-offs.	No

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> **Tip:** Alternatively, you can click the **Duplicate** button in the **Refund/Write Off Request Type** zone to create a copy of the refund or write off request type.

5. Enter the required details in the **Main** section.
6. Define, edit, or remove characteristics of the refund or write off request type, if required.
7. Click **Save**.
   The new refund or write off request type is defined.

Related Topics

For more information on...	See...
Refund/Write Off Request Type screen	Refund/Write Off Request Type on page 1747
Refund/Write Off Request Type List zone	Refund/Write Off Request Type List on page 1750
Refund/Write Off Request Type zone	Refund/Write Off Request Type on page 1751
How to define a characteristic for a refund or write off request type	Defining a Characteristic for a Refund or Write Off Request Type on page 1758

Deleting a Refund or Write Off Request Type

Procedure

To delete a refund or write off request type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **R** and then click **Refund/Write Off Request Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Refund/Write Off Request Type** sub-menu.
   The **Refund/Write Off Request Type** screen appears.
4. In the **Refund/Write Off Request Type List** zone, click the **Delete** (🗑) icon in the **Delete** column corresponding to the refund or write off request type that you want to delete.

   A message appears confirming whether you want to delete the refund or write off request type.

> **Note:** You can delete a refund or write off request type when you have not defined a refund or write off request using the refund or write off request type.

> **Tip:** Alternatively, you can click the **Delete** button in the **Refund/Write Off Request Type** zone to delete the refund or write off request type.

5. Click **OK**.
   The refund or write off request type is deleted.

Related Topics

For more information on...	See...
Refund/Write Off Request Type screen	Refund/Write Off Request Type on page 1747

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For more information on...	See...
Refund/Write Off Request Type List zone	Refund/Write Off Request Type List on page 1750
Refund/Write Off Request Type zone	Refund/Write Off Request Type on page 1751

Viewing the Refund or Write Off Request Type Details

Procedure

To view the details of a refund or write off request type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **R** and then click **Refund/Write Off Request Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Refund/Write Off Request Type** sub-menu.
   The **Refund/Write Off Request Type** screen appears.
4. In the **Refund/Write Off Request Type List** zone, click the **Broadcast** (ᯤ) icon corresponding to the *r*efund or write off request type whose details you want to view.
   The **Refund/Write Off Request Type** zone appears.
5. View the details of the refund or write off request type in the **Refund/Write Off Request Type** zone.

Related Topics

For more information on...	See...
Refund/Write Off Request Type screen	Refund/Write Off Request Type on page 1747
Refund/Write Off Request Type List zone	Refund/Write Off Request Type List on page 1750
Refund/Write Off Request Type zone	Refund/Write Off Request Type on page 1751

Refund/Write Off Request (Used for Searching)

The **Refund/Write Off Request** screen allows you to search for a refund or write off request using various search criteria. It also allows you to create a refund or write off request. It contains the following zone:

- Search Refund/Write Off Request on page 1767

Through this screen, you can navigate to the following screens:

- Refund Request (Used for Viewing) on page 1780
- Write Off Request (Used for Viewing) on page 1818

Search Refund/Write Off Request

The **Search Refund/Write Off Request** zone allows you to search for a refund and write off request using various search criteria. It contains the following two sections:

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- **Search Criteria** - The **Search Criteria** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Search By	Used to indicate whether you want to search for a refund or write off request using the request, payment, or bill details. The valid values are: • Request Details • Payment Details • Bill Details **Note:** By default, the **Request Details** option is selected.	Yes
Action	Used to indicate whether you want to search for a refund or write off request. The valid values are: • Refund • Write Off **Note:** This field appears when the **Request Details** or **Bill Details** option is selected from the **Search By** list.	No
Refund/Write Off Request Type	Used to search for refund or write off requests which are created using a particular refund or write off request type. **Note:** This field appears when the **Request Details** option is selected from the **Search By** list. The list includes only those refund or write off requests types which are already defined in the system. The values appear in this list when the respective refund or write off type is selected from the **Action** list.	No
Status	Used to search for refund or write off requests with a particular status. The valid values are: • Approval In Progress • Cancelled • Deferred Cancel • Deferred Processing • Deferred Void • Draft • Hold • Processed • Rejected • Voided **Note:** This field appears when the **Request Details** option is selected from the **Search By** list. **Tip:** The **Voided** status is applicable when you want to search a refund request whereas the **Cancelled** status is applicable when you want to search a write off request.	No

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Field Name	Field Description	Mandatory (Yes or No)
User ID	Used to search for refund or write off requests which are created by a particular user. **Note:** This field appears when the **Request Details** option is selected from the **Search By** list. The **Search**( ) icon appears corresponding to this field. On clicking the **Search** icon the **User Search** window appears.	No
Refund/Write Off Request ID	Used to search a particular refund or write off request. **Note:** This field appears when you select the **Request Details** option from the **Search By** list.	No
Creation From Date	Used to search for refund or write off requests which are created on or after the specified date. **Note:** This field appears when the **Request Details** option is selected from the **Search By** list. You can either manually specify the date or select it using the **Date Picker** ( ) icon corresponding to the field. Simultaneously, you can also specify the time or select it using the **Time Picker** ( ) icon corresponding to the field. The creation from date cannot be later than the created to date.	No
Account ID	Used to search for refund or write off requests which include the bills of a particular account. **Note:** This field appears when the **Request Details** option is selected from the **Search By** list. The **Search**( ) icon appears corresponding to this field. On clicking the Search icon the **Account Search** window appears.	No
Created To	Used to search for refund or write off requests which are created till a specified date.	No

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Field Name	Field Description	Mandatory (Yes or No)
	Note: This field appears when the **Request Details** option is selected from the **Search By** list. You can either manually specify the date or select it using the **Date Picker** ( ) icon corresponding to the field. Simultaneously, you can also specify the time or select it using the **Time Picker** ( ) icon corresponding to the field. The created to date cannot be earlier than the creation from date.	
Payment Event ID	Used to search for refund requests (through which a payment event is created) for refund purposes. **Note:** This field appears when the **Payment Details** option is selected from the **Search By** list. The **Search** () icon appears corresponding to this field. On clicking the **Search** icon the **Payment Event Search** window appears.	No
Payor Account ID	Used to search for refund requests which are created for a particular payor account. **Note:** This field appears when the **Payment Details** option is selected from the **Search By** list. The **Search** ( ) icon appears corresponding to this field. On clicking the **Search** icon the **Account Search** window appears.	No
Payor Name	Used to search for refund requests which are created for a particular payor. **Note:** This field appears when the **Payment Details** option is selected from the **Search By** list.	No
Payment Date	Used to search for refund requests which include payments made on a particular date. **Note:** This field appears when the **Payment Details** option is selected from the **Search By** list. You can either manually specify the date or select it using the **Date Picker** ( ) icon corresponding to the field.	No
MICR ID	Used to search for refund requests which include payments made with a particular MICR code.	No

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Field Name	Field Description	Mandatory (Yes or No)
	Note: This field appears when the **Payment Details** option is selected from the **Search By** list.	
Check Number	Used to search for refund request which include payments made through a particular check number. **Note:** This field appears when the **Payment Details** option is selected from the **Search By** list.	No
Bill ID	Used to search for refund or write off requests which include bill segments or adjustments of a particular bill. **Note:** This field appears when the **Bill Details** option is selected from the **Search By** list. The **Search** (🔍) icon appears corresponding to this field. On clicking the **Search** icon the **Bill Search** window appears.	No
Bill Date From	Used to search for refund or write off requests which include bill segments or adjustments which are generated on or after the specified date. **Note:** This field appears when the **Bill Details** option is selected from the **Search By** list. You can either manually specify the date or select it using the **Date Picker** (📅) icon corresponding to the field. The bill date from date cannot be later than the bill date to date.	No
Bill Date To	Used to search for refund or write off requests which include bill segments or adjustments which are created till a specified date. **Note:** This field appears when the **Bill Details** option is selected from the **Search By** list. You can either manually specify the date or select it using the **Date Picker** (📅) icon corresponding to the field. The bill date to date cannot be earlier than the bill date from date.	No

Note: You must specify at least one search criterion while searching for a refund or write off request.

- **Search Results** - On clicking the **Search** button, the search results appear based on the specified search criteria. The **Search Results** section contains the following columns:

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Column Name	Column Description
Creation Date Time	Displays the date and time when the refund or write off request is created.
Refund/Write Off Request Information	Displays information about the refund or write off request. **Note:** It has a link. On clicking the link, the **Refund Request** or **Write Off Request** screen appears where you can view the details of the respective request.
Status	Indicates the status of the refund or write off request. The valid values are: • Approval In Progress • Cancelled • Deferred Cancel • Deferred Processing • Deferred Void • Draft • Hold • Processed • Rejected • Voided
Action	Indicates whether the request is created for refund or write off. The valid values are: • Refund • Write Off **Note:** This column appears when the **Request Details** or **Bill Details** option is selected from the **Search By** list.
Refund/Write Off Amount	Displays the total refund or write off amount. **Note:** This column appears when the **Request Details** or **Bill Details** option is selected from the **Search By** list.
Refund Amount	Displays the total amount available for refund. **Note:** This column appears when the **Payment Details** option is selected from the **Search By** list.
Account Information	Displays additional information about the account for which the refund or write off request is created. In addition, a context menu (⊙) icon appears corresponding to this field which helps in navigating to other screens in the application. **Note:** It has a link. On clicking the link, the **Account** screen appears where you can view the details of the respective account.
Created By	Indicates the user who has created the refund or write off request.

Note: Pagination is used to display limited number of records in the **Search Results** section. You can use the navigation links, such as **Previous** and **Next** to navigate between pages. Note that navigation links appear in the **Search Results** section only when the records in the search results exceed 20.

Related Topics

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For more information on...	See...
How to search for a refund or write off request	Searching for a Refund or Write Off Request on page 1773
How to view the details of a refund request	Viewing the Refund Request Details on page 1779
How to view the details of a write off request	Viewing the Write Off Request Details on page 1779
How to create a refund request	Creating a Refund Request on page 1774
How to create a write off request	Creating a Write Off Request on page 1776

Searching for a Refund or Write Off Request

Prerequisites

To search for a refund or write off request, you should have:

- Refund or Write Off request types defined in the application

Procedure

To search for a refund or write off request:

1. Click the **Menu** link in the **Application** toolbar.
   A list appears.
2. From the **Main** menu, select **Accounting and Receivable** and then click **Refund/Write Off Request**.
   A sub-menu appears.
3. Click the **Search** option from the **Refund/Write Off Request** sub-menu.
   The **Refund/Write Off Request** screen appears.
4. Enter the search criteria in the **Search Refund/Write Off Request** zone depending on whether you want to search for a refund or write off request.

   Note: ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.
5. Click **Search**.
   A list of refund or write off requests that meet the search criteria appears in the **Search Results** section.

Related Topics

For more information on...	See...
Refund/Write Off Request screen	Refund/Write Off Request (Used for Searching) on page 1767
Search Refund/Write Off Request zone	Search Refund/Write Off Request on page 1767

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Creating a Refund Request

Prerequisites

To create a refund request, you should have:

- Refund request types defined in the application.
- Adjustment types defined in the application where the **A/P Request Type Code** flag is set to **Refund**.

Procedure

To create a refund request:

1. Do either of the following:

If you want to...	Then...
Define a refund request from the Account Receivable Central screen	**a.** Click the **Main** link in the **Application** toolbar. A list appears. **b.** From the **Main** menu, select **Accounting and Receivable** and then click **Account Receivable Central**. **c.** Search for the bill in the **Account Receivable Central** screen. **d.** In the **Search Results** section, select the respective bill and then click the **Refund** button. **Note:** You can select only one bill at a time (where the outstanding balance is non-zero) while creating a refund request from the **Account Receivable Central** screen.
Define a refund request from the Refund Request screen	**a.** Click the **Main** link in the **Application** toolbar. A list appears. **b.** From the **Main** menu, select **Accounting and Receivable** and then click **Refund/Write Off Request**. A sub-menu appears. **c.** Click the **Add** option from the **Refund/Write Off Request** sub-menu.
Define a refund request from the Payment Event Summary screen	**a.** Click the **Main** link in the **Application** toolbar. A list appears. **b.** From the **Main** menu, select **Payments** and then click **Payment Event Summary**. **c.** Search for the payment event (whose payments you want to refund) in the **Payment Event Summary** screen. **d.** In the **Search Results** section, click the **Broadcast** (📡) icon corresponding to the payment event whose payments you want to view. The **Payments** zone appears. **e.** Select the option corresponding to the payments that you want to refund. **f.** Click the **Refund** button in the **Payments** zone. **Note:** The system allows you to refund only those payments which are in the **Frozen** status and are matched against the suspense or excess credit contract.

The **Select Request Type** screen appears. It contains the following fields:

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Field Name	Field Description	Mandatory (Yes or No)
Action	Used to indicate the type of request that you want to create. The valid values are: • Refund • Write Off **Note:** If you are creating a refund request (for a bill or payment) through the **Account Receivable Central** or **Payment Event Summary** screen, the system by default sets the action to **Refund** and the field is non-editable. This field is editable only when the refund request is created from the **Refund/Write Off Request** screen.	Not applicable
Refund/Write Off Request Type	Used to indicate the request type using which you want to create the refund request. **Note:** The refund request types appear only when the **Refund** option is selected from the **Action** list. On selecting the respective action from the **Action** list, the **Refund or Write Off Request Type** list is populated.	Yes
Account	Used to indicate the account for which you want to create the refund request. **Note:** If you are creating a refund request (for a bill or payment) via the **Account Receivable Central** or **Payment Event Summary** screen, the system by default sets the action to **Refund** and the field is non-editable. This field is editable if the refund request is created from the **Refund/Write Off Request** screen. The **Search** icon appears corresponding to this field. On clicking the **Search** icon the **Account Search** window appears. On specifying the account, the description of the account appears corresponding to the **Account** field.	Yes
Adjustment Level	Used to indicate the adjustment level for which you want to create the refund request.	No

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Field Name	Field Description	Mandatory (Yes or No)
	Note: If you are creating a refund request (for a bill or payment) via the **Account Receivable Central** or **Payment Event Summary** screen, the system by default sets the action to **Refund** and the field is non-editable. By default, this field is disabled.	

Tip: Alternatively, you can access the **Select Request Type** screen by clicking the **Add** button in the **Page Title** area of the **Refund/Write Off Request** screen.

2. Select the required refund request type from the respective field.
3. Click **Save**.
   The refund request is created and the status of the refund request is set to **Draft**. The **Refund/Write Off Request** screen appears with the details of the refund request.

Note: The refund request is created only for those outstanding bills where the outstanding amount is less than zero.

4. Override the address if you want to send the refund amount to a different address other than the address of the account's main customer, if required.
5. Add the payments, payment events, or credit bill line items which you want to refund, if required.
6. Edit the refund amount of the respective entity, if required.
7. Define characteristics for the refund request, if required.

Related Topics

For more information on...	See...
Refund Request screen	Refund Request (Used for Viewing) on page 1780
Account Receivable Central screen	Account Receivable Central on page 1562
Payment Event Summary screen	Payment Event Summary on page 1536
How to add a payment event to the refund request	Adding a Payment Event to the Refund Request on page 1796
How to add a payment to the refund request	Adding a Payment to the Refund Request on page 1798
How to add a credit bill line item to the refund request	Adding a Credit Bill Line Item to the Refund Request on page 1801
How to edit a refund request	Editing a Refund Request on page 1804
How to define a characteristic for a refund request	Defining a Characteristic for a Refund Request on page 1795

Creating a Write Off Request

Prerequisites

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To create a write off request, you should have:

- Write off request types defined in the application.
- Adjustment types defined in the application where the **A/P Request Type Code** flag is not set to **Refund**.

Procedure

To create a write off request:

1. Do either of the following:

If you want to...	Then...
Define a write off request from the Account Receivable Central screen	**a.** Click the **Main** link in the **Application** toolbar. A list appears. **b.** From the **Main** menu, select **Accounting and Receivable** and then click **Account Receivable Central**. **c.** Search for the bill in the **Account Receivable Central** screen. **d.** In the **Search Results** section, select the respective bill and then click **Write Off** button.
	Note: You can select only one bill at a time (where the outstanding balance is non-zero) while creating a write off request from the **Account Receivable Central** screen.
Define a write off request from the Write Off Request screen	**a.** Click the **Main** link in the **Application** toolbar. A list appears. **b.** From the **Main** menu, select **Accounting and Receivable** and then click **Refund/Write Off Request**. A sub-menu appears. **c.** Click the **Add** option from the **Refund/Write Off Request** sub-menu.

The **Select Request Type** screen appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Action	Used to indicate the type of request which you want to create. The valid values are: • Refund • Write Off	Yes
	Note: If you are creating a write off request for a bill through the **Account Receivable Central** screen, the system by default sets the action to **Write Off** and the field is non-editable. This field is editable only when the write off request is created from the **Refund/Write Off Request** screen.	
Refund/Write Off Request Type	Used to indicate the request type using which you want to create the write off request.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The write off request types appear only when the **Write Off** option is selected from the **Action** list. On selecting the respective action from the **Action** list, the **Refund or Write Off Request Type** list is populated.	
Account	Used to indicate the account for which you want to create the write off request. **Note:** If you are creating a write off request for a bill through the **Account Receivable Central** screen, the system by default sets the action to **Write Off** and the field is non-editable. This field is editable only when the write off request is created from the **Refund/Write Off Request** screen. The **Search** (🔍) icon appears corresponding to the respective field. On clicking the **Search** icon the **Account Search** window appears. On specifying the account, the description of the account appears corresponding to the **Account** field.	Yes
Adjustment Level	Used to indicate the adjustment level for which you want to create the write off request. **Note:** If you are creating a write off request for a bill through the **Account Receivable Central** screen, the system by default sets the action to **Write Off** and the field is non-editable. By default, this field is disabled.	No

Tip: Alternatively, you can access the **Select Request Type** screen by clicking the **Add** button in the **Page Title** area of the **Refund/Write Off Request** screen.

2. Select the required write off request type and account from the respective field.
3. Click **Save**.

   The write off request is defined and the status of the write off request is set to **Draft**. The **Write Off Request** screen appears with the details of the write off request.

Note: The write off request is created only for those outstanding bills where the outstanding amount is greater than zero.

4. Edit or delete the write off details or debit bill line items from the write off request, if required.
5. Edit the adjustment level for the write off request, if required.
6. Define characteristics for the write off request, if required.

Related Topics

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For more information on...	See...
Write Off Request screen	Write Off Request (Used for Viewing) on page 1818
Account Receivable Central screen	Account Receivable Central on page 1562
How to add a debit bill line item to the write off request	Adding a Debit Bill Line Item to the Write Off Request on page 1830
How to edit a write off request	Editing a Write Off Request on page 1832
How to define a characteristic for a write off request	Defining a Characteristic for a Write Off Request on page 1827

Viewing the Refund Request Details

Procedure

To view the details of a refund request:

1. Search for the refund request in the **Refund/Write Off Request** screen.
2. In the **Search Results** section, click the link in the **Refund/Write Off Request Information** column *c*orresponding to the refund request whose details you want to view.
   The **Refund Request** screen appears.
3. View the details of the refund request in the **Refund Request** zone.
4. View the entities such as payment events, payments, or credit bill line items (which can be refunded) in the **Refund Details** zone.

Related Topics

For more information on...	See...
Refund Request screen	Refund Request (Used for Viewing) on page 1780
Refund Request zone	Refund Request on page 1780
Refund Details zone	Refund Details on page 1783
How to search for a refund request	Searching for a Refund or Write Off Request on page 1773

Viewing the Write Off Request Details

Procedure

To view the details of a write off request:

1. Search for the write off request in the **Refund/Write Off Request** screen.
2. In the **Search Results** section, click the link in the **Refund/Write Off Request Information** column *c*orresponding to the write off request whose details you want to view.
   The **Write Off Request** screen appears.
3. View the details of the write off request in the **Write Off Request** zone.
4. View the entities such as debit bill segments and adjustments (which can be written off) in *t*he **Write Off Details** zone.

Related Topics

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For more information on...	See...
Write Off Request screen	Write Off Request (Used for Viewing) on page 1818
Write Off Request zone	Write Off Request on page 1818
Write Off Details zone	Write Off Details on page 1820
How to search for a write off request	Searching for a Refund or Write Off Request on page 1773

Refund Request (Used for Viewing)

Once you create a refund request, the **Refund Request** screen allows you to:

- Edit and delete a refund request
- View the details of a refund request
- Submit a refund request for approval
- Approve or reject a refund request
- View the log of a refund request
- Add a log entry for a refund request
- Void a refund request

This screen consists of the following tabs:

- Refund Request - Main on page 1780
- Refund Request - Bills on page 1786

  Note: The **Bills** tab appears only when the refund request is in the **Draft** status.
- Refund Request - Payments and Adjustments on page 1789

  Note: The **Payments and Adjustments** tab appears only when the refund request is in the **Draft** status.
- Refund Request - Log on page 1795

Refund Request - Main

The **Main** tab displays information about the refund request. It contains the following zones:

- Refund Request on page 1780
- Refund Details on page 1783

  Note: The **Refund Details** zone appears when the refund request is in **Draft** status and the total refund amount is greater than zero.
- Bill Line Items on page 1784

Refund Request

The **Refund Request** zone displays the details of the refund request. This zone contains the following sections:

- **Main** - Displays the basic information about the refund request. It contains the following fields:

Field Name	Field Description
Refund Request Information	Displays information about the refund request.

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Field Name	Field Description
Refund Request Type	Indicates the refund request type using which the refund request is created. **Note:** It has a link. On clicking the link, the **Refund/Write Off Request Type** screen appears where you can view the details of the respective refund request type.
Status	Indicates the status of the refund request. The valid values are: • Approval In Progress • Cancelled • Deferred Cancel • Deferred Processing • Deferred Void • Draft • Hold • Processed • Rejected • Voided
Status Reason	Indicates the reason why the refund request is rejected or voided. **Note:** It has a link. On clicking the link, the **Status Reason** screen appears where you can view the details of the rejected or voided reason. This field appears when the refund request is in either **Rejected** or **Voided** status.
Adjustment Level	Indicates the adjustment level for which you want to create the refund request.
Account Information	Indicates the account for which the refund request is created. **Note:** It has a link. On clicking the link, the **Account** screen appears where you can view the details of the respective account.
Person Name	Indicates the person for whom the refund request is created.
Override Address	Indicates whether the account's mailing address is overridden.
Address 1	Displays the house number and apartment name.
Address 2	Displays the street name.
Address 3	Indicates the landmark, if available.
Address 4	Displays the village or town name.
City	Displays the city name.
State	Displays the state name.
Country	Displays the country name.
Postal	Displays the postal or zip code.
Comments	Displays additional information about the refund request.
Total Refund Amount	Displays the total refund amount.

- **Characteristics** - Lists the characteristics defined for the refund request. It contains the following fields:

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Field Name	Field Description
Effective Date	Indicates the date from when the characteristic is effective for the refund request.
Characteristic Type	Indicates the characteristic type.
Characteristic Value	Displays the value of the characteristic type.

- **Record Actions** - This section contains the following buttons:

Button Name	Button Description
Edit	Used to edit the details of the refund request. **Note:** The **Edit** button appears when the refund request is in the **Draft** status.
Delete	Used to delete the refund request. **Note:** The **Delete** button appears when the refund request is in the **Draft** status.
Submit	Used to submit the refund request for approval. **Note:** The **Submit** button appears when the refund request is in the **Draft** status.
Approve	Used to approve the refund request. **Note:** The **Approve** button appears when: • The refund request is in the **Approval In Progress** status. • A user with the approval To Do role is reviewing the refund request.
Reject	Used to reject the refund request. **Note:** The **Reject** button appears when: • The refund request is in the **Approval In Progress** status. • A user with the approval To Do role is reviewing the refund request.
Void	Used to void the refund request. **Note:** The **Void** button appears when the refund request is in the **Processed** status.

- **Record Information** - This section contains the following fields:

Field Name	Field Description
Business Object	Indicates the business object using which the refund request is created. In addition, a context menu (⊙) icon appears corresponding to this field which helps in navigating to other screens in the application. **Note:** It has a link. On clicking the link, the **Business Object** screen appears where you can view the details of the respective business object.
Status Date/Time	Displays the date and time when the refund request status is updated
Create Date/Time	Displays the date and time when the refund request is created.

- **Characteristics** - Lists the characteristics of the refund request. It contains the following columns:

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Column Name	Column Description
Effective Date	Indicates the date from when the characteristic is effective.
Characteristic Type	Indicates the characteristic type.
Characteristic Value	Displays the value of the characteristic type.

Refund Details

The **Refund Details** zone lists the payment events, payments, and credit bill line items (such as bill segments and adjustments) that you have added to the refund request. This zone contains the following columns:

Column Name	Column Description
Entity ID	Displays the entity ID.
Entity Type	Indicates whether the entity is a payment, payment event, bill, bill segment, or an adjustment.
Currency	Indicates the currency in which the entity was created.
Entity Amount	Displays the entity amount.
Refund Amount	Displays the amount that must be refunded. **Note:** By default, the amount which is eligible for refund appears in this column. You can edit the amount, if required. However, you cannot specify the amount greater than the eligible amount.
Contract Information	Displays additional information about the contract against which the bill segment or adjustment is created or against which the payment is matched. In addition, a context menu (⊙) icon appears corresponding to this field which helps in navigating to other screens in the application. **Note:** It has a link. On clicking the link, the **Contract** screen appears where you can view the details of the respective contract.
Adjustment Type	Indicates the adjustment type using which the refund adjustment must be created. **Note:** By default, the adjustment type specified in the refund request type appears in this column. You can change the adjustment type, if required, by editing the refund request.
Adjustment Information	Displays additional information about the refund adjustment. **Note:** It has a link. On clicking the link, the **Adjustment** screen appears where you can view the details of the respective adjustment. Data in this column appears only when the refund request is in the **Processed** status. The information string appears when an algorithm of the **C1-ADI-INFO** algorithm type is attached to the **Adjustment Information** system event in the **Algorithms** tab of the **Installation Options - Framework** screen.

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Column Name	Column Description
Bill Information	Displays additional information about the bill. In addition, a context menu (⊙) icon appears corresponding to this field which helps in navigating to other screens in the application. **Note:** It has a link. On clicking the link, the **Bill** screen appears with the details of the respective bill. Data in this column appears only when the refund request is in the **Processed** status and the entity type is **Bill**.
Payment Refunded	Displays the refunded amount. In addition, a context menu (⊙) icon appears corresponding to this field which helps in navigating to other screens in the application. **Note:** It has a link. On clicking the link, the **Payment** screen appears with the details of the respective bill. Data in this column appears only when the refund request is in the **Processed** status and the entity type is either **Payment** or **Payment Event**.

In addition, this section contains the following buttons:

Button Name	Button Description
Edit	Used to edit the details of bill line items.
Delete	Used to delete the bill line items.

Note:

Pagination is used to display limited number of records in the **Search Results** section. You can use the navigation links, such as **Previous** and **Next** to navigate between pages. Note that the navigation links appear in the **Search Results** section only when the records in the search results exceed 20.

A check box appears corresponding to each refund record. To update the details of a refund record, select the check box corresponding to the refund record and then click the **Edit** button. You can also select multiple refund records at the same time. You can select one or more refund records and click either the **Edit** or **Delete** button in this zone to perform the respective action. In addition, you can select the check box corresponding to the column header. This allows you to select all the refund records listed in the respective zone.

To delete a refund request, select the check box corresponding to the refund record and click the **Delete** button. You can also select multiple refund records at the same time.

You can filter the list using the **Entity Type** and **Entity Amount** field available in the **Filter** area. By default, the **Filter** area is hidden. You can view the **Filter** area by clicking the **Filters** (▽) icon in the upper right corner of this zone.

Bill Line Items

The **Bill Line Items** zone lists the debit and credit bill segments and adjustments of the bill. This zone contains the following columns:

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Column Name	Column Description
Bill ID	Displays the bill ID.
Entity ID	Displays the bill segment or adjustment ID.
Entity Type	Indicates whether the entity is a bill, bill segment, or an adjustment.
Currency	Displays the currency in which the entity was created.
Entity Amount	Displays the bill segment or adjustment amount.
Request Amount	Displays the bill segment or adjustment amount which is eligible for refund. The system calculates the request amount using the following formula: `Request Amount = Entity Amount-Refund Amount` **Note:** In case the bill segment or adjustment has a debit balance, the eligible amount for refund would be zero.
Contract Information	Displays additional information about the contract against which the bill segment or adjustment is created. In addition, a context menu (⌄) icon appears corresponding to this field which helps in navigating to other screens in the application. **Note:** It has a link. On clicking the link, the **Contract** screen appears where you can view the details of the respective contract.
Adjustment Type	Indicates the adjustment type using which the refund adjustment must be created. **Note:** It has a link. On clicking the link, the **Adjustment Type** screen appears where you can view the details of the respective adjustment type.
Adjustment Information	Displays information about the write off adjustment. **Note:** It has a link. On clicking the link, the **Adjustment** screen appears where you can view the details of the respective adjustment. The data appears in this column only when the status of the write off request is **Processed**. The information string appears when an algorithm of the **C1-ADI-INFO** algorithm type is attached to the **Adjustment Information** system event in the **Algorithms** tab of the **Installation Options - Framework** screen.

In addition to above columns, this screen contains following buttons:

Button Name	Button Description
Edit	Used to edit the details of bill line items.
Delete	Used to delete the bill line items.

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Note:

Pagination is used to display limited number of records in the **Search Results** section. You can use the navigation links, such as **Previous** and **Next** to navigate between pages. Note that the navigation links appear in the **Search Results** section only when the records in the search results exceed 20.

By default, the **Bill Line Items** zone does not appear in the **Refund Request** screen. It appears only when you click the **Broadcast** (⦾) icon in the **Refund Details** zone corresponding to the entity type where the entity type is set to **Bill**.

A check box appears corresponding to each bill line item. To add a bill line item to the refund request, click the check box corresponding to the bill line item and click the **Add** button. You can also select multiple bill line items at the same time. In addition, you can select the check box corresponding to the column header. This allows you to select all the bill line items listed in the respective zone. For more information, see Adding a Credit Bill Line Item to the Refund Request on page 1801

You can filter the list using the **Entity Type** and **Entity Amount** field available in the **Filter** area. By default, the **Filter** area is hidden. You can view the **Filter** area by clicking the **Filters** (⧩) icon in the upper right corner of this zone.

Refund Request - Bills

The **Bills** tab allows you to search bills with credit line items such as credit bill segments and adjustments that you want to refund. It contains the following zones:

- Search Bills on page 1786
- Bill Line Items on page 1788

Search Bills

The **Search Bills** zone allows you to search for bills using various search criteria. It also lists the completed bills of the account which either have a credit balance or one or more credit line items, such as bill segments and adjustments. This zone contains the following two sections:

- **Search Criteria** - The **Search Criteria** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Search By	Used to indicate whether you want to search for a bill using bill or bill and price item details. The valid values are: • Bill Details • Bill and Price Item Details **Note:** By default, the **Bill Details** option is selected.	Yes
Bill ID	Used to search a particular bill. **Note:** The **Search** 🔍 icon appears corresponding to the **Bill ID** field. On clicking the **Search** icon the **Bill Search** window appears.	No
Bill Date From	Used to search for bills which are created on or after the specified date.	No

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Field Name	Field Description	Mandatory (Yes or No)
	Note: You can either manually specify the date or select it using the **Date Picker** ( ) icon corresponding to the field. The bill date from date cannot be later than the bill date to date.	
Bill Date To	Used to search for bills which are created till a particular date.	No
	Note: You can either manually specify the date or select it using the **Date Picker** ( ) icon corresponding to the field. The bill date to date cannot be earlier than the bill date from date.	
Price Item	Used to search for bills which are created for a particular price item.	No
	Note: This field appears when you select **Bill and Price Item Details** option from the **Search By** list. You can search for a price item by clicking the **Search** () icon corresponding to the **Price Item** field. On clicking the **Search** icon the **Price Item Search** window appears.	

- **Search Results** - On clicking the **Search** button, the search results are filtered based on the specified search criteria. The **Search Results** section contains the following columns:

Column Name	Column Description
Bill ID	Displays the bill ID.
Bill Information	Displays additional information about the bill. In addition, a context menu ( ) icon appears corresponding to this field which helps in navigating to other screens in the application.
	Note: It has a link. On clicking the link, the **Bill** screen appears with the details of the respective bill.
Amount	Displays the total amount of the bill.

In addition to above columns, this screen contains following button:

Button Name	Button Description
Add	Used to add a bill to the refund request.

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Note:

On clicking the **Broadcast** ( ) icon corresponding to the bill, the **Bill Line Items** zone appears where you can view the details of the respective bill.

A check box appears corresponding to each bill. To add a bill to the refund request, click the check box corresponding to the payment and click the **Add** button. You can also select multiple bills at the same time. In addition, you can select the check box corresponding to the column header. This allows you to select all the bills listed in the respective zone. For more information, see Adding a Credit Bill to the Refund Request on page 1799

If you want to refund a bill with a credit balance (including all the credit line items of the respective bill) you need to select the check box corresponding to the bill and click the **Add** button in the **Search Results** section. The system adds all the credit bill segments and bill adjustments to the **Refund Details** zone in the **Main** tab of the **Refund Request** screen. However, if you select a bill (with a credit balance) which contains one or more debit line items or if you select a bill (with a debit balance) which contains one or more credit line items, the system will not allow you to add the credit line items in the refund request directly by adding the bill. In such case, you need to individually select the credit bill segments and bill adjustments, and add them in the **Refund Details** zone in the **Main** tab of the **Refund Request** screen.

If a debit bill appears in the **Search Results** section which contains one or more debit line items where the eligible amount is zero, the system does not add such a bill to the **Refund Details** zone in the **Main** tab of the **Refund Request** screen.

If a refund request is currently in progress for a credit bill segment or adjustment of a bill, then the bills of the respective account do not appear in the **Search Bills** zone. In addition, a bill with all debit line items do not appear in the **Search Bills** zone.

Bill Line Items

The **Bill Line Items** zone lists the debit and credit bill segments, and the adjustments of the bill. This zone contains the following columns:

Column Name	Column Description
Entity ID	Displays the bill segment or adjustment ID.
Entity Type	Indicates whether the entity is a bill segment or an adjustment.
Entity Information	Displays additional information about the bill segment or adjustment. In addition, a context menu ( ) icon appears corresponding to this field which helps in navigating to other screens in the application.
	Note: The content menu appears only when the entity is a bill segment. It has a link. If the entity is a bill segment, the **Bill Segment** screen appears where you can view the details of the respective bill segment. However, if the entity is an adjustment, the **Adjustment** screen appears where you can view the details of the respective adjustment.
Entity Amount	Displays the bill segment or adjustment amount.
Eligible Amount	Displays the bill segment or adjustment amount which is eligible for refund. The system calculates the eligible amount using the following formula: `Eligible Amount = Entity Amount-Amount Refunded`

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Column Name	Column Description
	Note: If the bill segment or adjustment has debit balance, the eligible amount for refund would be zero.
Amount Refunded	Displays the amount which is already refunded to the account.
Contract Information	Displays additional information about the contract against which the bill segment or adjustment is created. In addition, a context menu (⊙) icon appears corresponding to this field which helps in navigating to other screens in the application.
	Note: It has a link. On clicking the link, the **Contract** screen appears where you can view the details of the respective contract.

Button Name	Button Description
Add	Used to add a bill line item to the refund request.

Note:

Pagination is used to display limited number of records in the **Search Results** section. You can use the navigation links, such as **Previous** and **Next** to navigate between pages. Note that the navigation links appear in the **Search Results** section only when the records in the search results exceed 20.

A check-box appears corresponding to each bill line item. To add a bill line item to the refund request, click the check box corresponding to the bill line item and click the **Add** button. You can also select multiple bill line items at the same time. In addition, you can select the check box corresponding to the column header. This allows you to select all the bill line items listed in the respective zone. For more information, see Adding a Credit Bill Line Item to the Refund Request on page 1801

By default, the **Bill Line Items** zone does not appear in the **Bills** tab. It appears only when you click the **Broadcast** (⊙) icon corresponding to the bill in the **Search Bills** zone.

You can filter the list using the **Bill Segment Date From** and **To** field available in the **Filter** area. By default, the **Filter** area is hidden. You can view the **Filter** area by clicking the **Filters** (▽) icon in the upper right corner of this zone.

Refund Request - Payments and Adjustments

The **Payments and Adjustments** tab allows you to search for payment events or individual payments that you want to refund using various search criteria. It contains the following zones:

- Search Payment Events and Adjustments on page 1789
- Payments and Adjustments on page 1793

Search Payment Events and Adjustments

The **Search Payment Events and Adjustments** zone allows you to search for payment events and adjustments using various search criteria. This zone contains the following two sections:

- **Search Criteria** - The **Search Criteria** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Search By	Used to indicate whether you want to search for payment events or adjustments using the payment or adjustment details. The valid values are:	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	• Payment Details • Adjustment Details **Note:** By default, the **Payment Details** option is selected.	
Payment Event ID	Used to search for payment events which are created using a particular payment event ID. **Note:** This field appears when you select **Payment Details** option from the **Search By** list.	No
Suspense/Excess Credit Contract	Used to search for payment events which include payments that are made against a particular suspense or excess credit contract. **Note:** The suspense and excess credit contracts appear in the **Suspense/Excess Credit Contract** list only when these contracts are associated with the account. This field appears when you select **Payment Details** option from the **Search By** list.	No
Check Number	Used to search for a payment event which includes a payment made through a particular check. **Note:** This field appears when you select **Payment Details** option from the **Search By** list.	No
Payment Date From	Used to search for payment events which include payments created from a particular date onwards. **Note:** This field appears when you select **Payment Details** option from the **Search By** list. You can either manually specify the date or select it using the **Date Picker** ( ) icon corresponding to the field. The payment date from date cannot be later than the payment date to date.	No
MICR ID	Used to search for payment events which include payments which contain a particular MICR code. **Note:** This field appears when you select **Payment Details** option from the **Search By** list.	No
Payment Date To	Used to search for payment events which include payments created till a particular date.	No

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Field Name	Field Description	Mandatory (Yes or No)
	Note: This field appears when you select **Payment Details** option from the **Search By** list. You can either manually specify the date or select it using the **Date Picker** ( ) icon corresponding to the field. The payment date to date cannot be earlier than the payment date from date.	
Adjustment ID	Used to search for adjustments with a particular adjustment ID. **Note:** This field appears when you select **Adjustment Details** option from the **Search By** list. The **Search** icon appears corresponding to this field. On clicking the **Search** icon the **Adjustment Search** window appears.	No
Adjustment Type	Used to search for adjustments which are created using a particular adjustment type. **Note:** This field appears when you select **Adjustment Details** option from the **Search By** list.	Yes
Account ID	Used to search for adjustments which are created for a particular account ID. **Note:** This field appears when you select **Adjustment Details** option from the **Search By** list. The **Search** icon appears corresponding to this field. On clicking the Search icon the **Account Search** window appears.	No
Contract ID	Used search for adjustments which are created for an account linked with a particular contract ID. **Note:** This field appears when you select **Adjustment Details** option from the **Search By** list. The **Search** icon appears corresponding to this field. On clicking the Search icon the **Contract Search** window appears.	No
Creation Date From	Used to search for adjustments which include refund adjustments created from a particular date onwards.	No

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Field Name	Field Description	Mandatory (Yes or No)
	Note: This field appears when you select the **Adjustment Details** option from the **Search By** list. You can either manually specify the date or select it using the **Date Picker** ( ) icon corresponding to the field. The creation date from date cannot be later than the creation date to date.	
Creation Date To	Used to search adjustment which include refund adjustments created till a particular date. **Note:** This field appears when you select the **Adjustment Details** option from the **Search By** list. You can either manually specify the date or select it using the **Date Picker** ( ) icon corresponding to the field. The creation date to date cannot be earlier than the creation date from date.	No

- **Search Results** - On clicking the **Search** button, the search results are filtered based on the specified search criteria. The **Search Results** section contains the following columns:

Column Name	Column Description
Payment Event	Indicates the payment event whose frozen payments you want to refund. **Note:** It has a link. On clicking the link, the **Payment Event** screen appears where you can view the details of the respective payment event. This column appears when you select the **Payment Details** option from the **Search By** list.
Payment Date	Displays the date when the payment event was created. **Note:** This column appears when you select the **Payment Details** option from the **Search By** list.
Tender Amount	Displays the tender amount associated with the payment event. **Note:** This column appears when you select the **Payment Details** option from the **Search By** list.
Payment Event ID	Displays the event ID associated with each payment event ID. **Note:** This column appears when you select the **Payment Details** option from the **Search By** list.

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Column Name	Column Description
Adjustment ID	Display the adjustment ID associated with each adjustment transaction. **Note:** This column appears when you select the **Adjustment Details** option from the **Search By** list.
Creation Date	Displays the date when the adjustment is created. **Note:** This column appears when you select the **Adjustment Details** option from the **Search By** list.
Adjustment Information	Displays the additional information about the adjustment. **Note:** This column appears when you select the **Adjustment Details** option from the **Search By** list. It has a link. On clicking the link, the **Adjustment** screen appears with the details of the respective adjustment.
Current Amount	Displays the adjustment amount. **Note:** This column appears when you select the **Adjustment Details** option from the **Search By** list.

Button Name	Button Description
Add	Used to add a payment event to the refund request.

On clicking the **Broadcast** (📡) icon corresponding to the payment event, the **Payments and Adjustment** zone appears where you can view the details of the respective payment event.

Note:

A check box appears corresponding to each payment event. To add the payments of a payment event to the refund request, select the check box corresponding to the payment event and then click the **Add** button. You can also select multiple payment events at the same time. You can select one or more payment events and click the **Add** button in this zone to add selected payment events to the refund request. In addition, you can select the check box corresponding to the column header. This allows you to select all the payment events listed in the respective zone. For more information, see Adding a Payment Event to the Refund Request on page 1796

Once you click the **Add** button, the system checks whether all the payments in the payment event are matched against the same suspense or excess credit contract, then the respective payment event is added in the **Refund Details** zone on the **Main** tab of the **Refund Request** screen. However, if the payments in the payment event are matched against different suspense or excess credit contracts, then all the payments of the payment event are added in the **Refund Details** zone on the **Main** tab of the **Refund Request** screen

If a refund request is currently in progress for a payment event or for any payment of a payment event, those payments events of the account do not appear in the **Search Payment Event** zone.

Payments and Adjustments

The **Payments and Adjustments** zone lists only those payments which are created through the payment event and are currently in the **Frozen** status. This zone contains the following columns:

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Column Name	Column Description
Payment ID	Indicates the payment to which the payment event is associated. **Note:** It has a link. On clicking the link, the **Payment** screen appears where you can view the details of the respective payment.
Payee Account	Indicates the account through which the payment is made. In addition, a context menu (⊙) icon appears corresponding to this field which helps in navigating to other screens in the application. **Note:** It has a link. On clicking the link, the **Account** screen appears where you can view the details of the respective payee account.
Payment Amount	Displays the amount which is applied on the suspense or excess credit contracts.
Payment Currency	Indicates the currency in which the payment was made.
Payment Status	Indicates the status of the payment. The valid values are: • Incomplete • Error • Freezable • Frozen • Canceled
Match Type	Indicates the match type using which the payment is matched.
Match Value	Indicates the entity (such as bill, bill segment, or contract) against which the payment is matched.
Amount Refunded	Displays the amount which is already refunded to the payor account.

Button Name	Button Description
Add	Used to add a payment or an adjustment to the refund request.

Note:

Pagination is used to display limited number of records in the **Search Results** section. You can use the navigation links, such as **Previous** and **Next** to navigate between pages. Note that the navigation links appear in the **Search Results** section only when the records in the search results exceed 20.

A check box appears corresponding to each payment. To add a payment to the refund request, click the check box corresponding to the payment and click the **Add** button. You can also select multiple payments at the same time. You can select one or more payments and click the **Add** button in this zone to add the selected payments to the refund request. In addition, you can select the check box corresponding to the column header. This allows you to select all the payments listed in the respective zone. For more information, see Adding a Payment to the Refund Request on page 1798

By default, the **Payments** zone does not appear in the **Payments** tab. It appears when you click the **Broadcast** (📡) icon corresponding to the payment event in the **Search Payment Events and Adjustments** zone.

You can filter the list using the **Payee Name** and **Payment Amount** field available in the **Filter** area. By default, the **Filter** area is hidden. You can view the **Filter** area by clicking the **Filters** (▽) icon in the upper right corner of this zone.

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Refund Request - Log

The **Log** tab contains the following zone:

- Refund Request Log on page 1795

Refund Request Log

The **Refund Request Log** zone lists the complete trail of actions performed on the refund request. This zone contains the following columns:

Column Name	Column Description
Creation Date/Time	Displays the date and time when the action was performed on the refund request.
Details	Displays the details about the action performed on the refund request.
User	Indicates the user who has performed the action on the refund request.
Log Type	Indicates the type of log.
Related Object	Indicates the object or entity which is created when the action is performed on the refund request. **Note:** At present, no data appears in this column. The implementation team can build the custom logic to meet the business requirements.
Status Reason	Indicates the reason why the refund request is rejected.

Note: You can manually add a log entry for the refund request by clicking the **Add Log Entry** link in the upper right corner of the **Refund Request Log** zone.

Related Topics

For more information on...	See...
How to view the log of a refund request	Viewing the Log of a Refund Request on page 1816

Defining a Characteristic for a Refund Request

Prerequisites

To define a characteristic for a refund request, you should have:

- Characteristic types defined in the application (where the characteristic entity is set to **Refund/Write Off Request**)

Procedure

To define a characteristic for a refund request:

1. Ensure that the **Characteristics** section is expanded when you are editing the refund request.

   The **Characteristics** section contains the following fields:

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Field Name	Field Description	Mandatory (Yes or No)
Effective Date	Used to specify the date from when the characteristic is effective for the refund request. **Note:** You can either manually specify the date or select it using the **Date Picker** (📅) icon corresponding to the field.	Yes (Conditional) **Note:** This field is required when you are defining a characteristic for the refund request.
Characteristic Type	Used to indicate the characteristic type. **Note:** The list includes only those characteristic types where the characteristic entity is set to **Refund Write Off Request**.	Yes (Conditional) **Note:** This field is required when you are defining a characteristic for the refund request.
Characteristic Value	Used to specify the value for the characteristic type. **Note:** If you select a predefined characteristic type, the **Search** (🔍) icon appears corresponding to the **Characteristic Value** field. On clicking the **Search** icon, the **Predefined Characteristic Search** window appears. On specifying the value for a predefined characteristic type, the description of the characteristic value appears corresponding to the **Characteristic Value** field.	Yes (Conditional) **Note:** This field is required when you are defining a characteristic for the refund request.

2. Enter the required details in the **Characteristics** section.
3. If you want to define more than one characteristic for the refund request, click the **Add** (+) icon and *t*hen repeat step 2.

Note: However, if you want to remove a characteristic from the refund request, click the **Delete** (🗑) icon corresponding to the characteristic.

Related Topics

For more information on...	See...
How to create a refund request	Creating a Refund Request on page 1774

Adding a Payment Event to the Refund Request

Prerequisites

To add a payment event to the refund request, you should have:

- Payment and payment events created in the application.

Procedure

To add a payment event to the refund request:

1. Search for the refund request in the **Refund/Write Off Request** screen.

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> **Note:** The refund request must be in the **Draft** status.

2. In the **Search Results** section, click the link in the **Refund/Write Off Request** column corresponding to the refund request whose details you want to edit.
   The **Refund Request** screen appears.
3. Ensure that the **Payments and Adjustments** tab is selected.

> **Note:** If the payment events are already listed in the **Search Results** section, you can directly navigate to step 6, else resume as follows:

4. Click the **Expand Filter** button and enter the search criteria in the **Search Payment Events and Adjustments** zone.

> **Note:** ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.

5. Click **Search**.
   A list of payment events that meet the search criteria appears in the **Search Results** section.
6. Select the check box corresponding to the payment event that you want to add in the refund request.

> **Note:** You can also select multiple payment events at the same time. In addition, you can select the check box corresponding to the column header. This allows you to add all the payment events listed in the **Search Results** section in the refund request.

7. Click the **Add** button in the **Search Payment Events and Adjustments** zone.
   The **Confirm Adjustment Type** window appears. It contains the following fields:

Field Name	**Field Description**	**Mandatory (Yes or No)**
Request Information	Displays information about the refund request	Not applicable
Adjustment Type	Used to indicate the adjustment type using which the refund adjustment should be created. **Note:** The **Search** (🔍) icon appears corresponding to this field. On clicking the **Search** icon the **Adjustment Type Search** window appears. On specifying the adjustment type, the description of the adjustment type appears corresponding to the **Adjustment Type Search** field.	No

8. Modify the adjustment type, if required.
9. Click **OK**.
   A message appears indicating that the selected payment events are successfully added in the refund request.

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Note:

To view the payment event details, click the **Broadcast** (ᯤ) icon corresponding to the payment event in the **Search Results** section.

You can add only those payment events (in the refund requests) which are in the **Frozen** status.

If all the payments of a payment event are matched against the same suspense or excess credit contract, the system adds the respective payment event in the refund request. However, if all the payments of a payment event are matched against different suspense or excess credit contracts, the system only adds the payments of the respective payment event in the refund request.

Related Topics

For more information on...	See...
How to create a refund request	Creating a Refund Request on page 1774

Adding a Payment to the Refund Request

Prerequisites

To add a payment to the refund request, you should have:

- Payments created in the application.

Procedure

To add a payment to the refund request:

1. Search for the refund request in the **Refund/Write Off Request** screen.

   Note: The refund request must be in the **Draft** status.

2. In the **Search Results** section, click the link in the **Refund/Write Off Request** column corresponding to the refund request whose details you want to edit.
   The **Refund Request** screen appears.
3. Ensure that the **Payments and Adjustments** tab is selected.

   Note: If the payment events are already listed in the **Search Results** section, you can directly navigate to step 6, else resume as follows:

4. Click the **Expand Filter** button and enter the search criteria in the **Search Payment Events and Adjustments** zone.

   Note: ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.

5. Click **Search**.
   A list of payment events that meet the search criteria appears in the **Search Results** section.
6. In the **Search Results** section, click the **Broadcast** (ᯤ) icon corresponding to the payment *e*vent whose payments you want to view.
   The **Payments and Adjustment** zone appears.
7. Select the check box corresponding to the payment that you want to add to the refund request.

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> **Note:** You can also select multiple payments at the same time. In addition, you can select the check box corresponding to the column header. This allows you to add all the payment listed in the respective zone.

8. Click the **Add** button in the **Payments and Adjustment** zone.
   The **Confirm Adjustment Type** window appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Request Information	Displays information about the refund request	Not applicable
Adjustment Type	Used to indicate the adjustment type using which the refund adjustment should be created. **Note:** The **Search** (🔍) icon appears corresponding to this field. On clicking the **Search** icon the **Adjustment Type Search** window appears. On specifying the adjustment type, the description of the adjustment type appears corresponding to the **Adjustment Type Search** field.	No

9. Click **OK**.
   A message appears indicating that the selected payment events are successfully added to the refund request.

> **Note:** You can add only those payments (to the refund requests) which are in the **Frozen** status.

Related Topics

For more information on...	See...
How to create a refund request	Creating a Refund Request on page 1774

Adding a Credit Bill to the Refund Request

You can refund the credit bills to an account.

Prerequisites

To add a credit bill to the refund request, you should have:

- Bills that are in the **Complete** status for an account with one or more credit line items.

Procedure

To add a credit bill to the refund request:

1. Search for the refund request in the **Refund/Write Off Request** screen.

> **Note:** The refund request must be in the **Draft** status.

2. In the **Search Results** section, click the link in the **Refund/Write Off Request** column corresponding to the refund request whose details you want to edit.
   The **Refund Request** screen appears.
3. Ensure that the **Bills** tab is selected.

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> **Note:** If the bills are already listed in the **Search Results** section, you can directly begin from step 6, else resume from step 4.

4. Click the **Expand Filter** button and enter the search criteria in the **Search Bills** zone.

> **Note:** ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.

5. Click **Search**.
   A list of bills that meet the search criteria appears in the **Search Results** section.
6. Do either of the following:

If...	Then...
A bill has all credit line items and you want to add the credit bill to the refund request	**a.** In the **Search Bills** zone, select the check box corresponding to the bill that you want to add in the refund request. **Note:** You can also select multiple payment events at the same time. In addition, you can select the check box corresponding to the column header. This allows you to add all the payment events listed in the **Search Results** section. **b.** Click the **Add** button in the **Search Bills** zone. **Note:** The default adjustment type selected in the refund request type should be an adjustment type where the A/P request type code is defined.
A bill has credit balance and one or more debit line items, and you want to add the bill with credit balance to the refund request	**a.** In the **Search Bills** zone, select the bills that you want to refund. **Note:** You can also select multiple payment events at the same time. In addition, you can select the check box corresponding to the column header. This allows you to add all the payment events listed in the **Search Results** section. **b.** Click the **Add** button in the **Search Bills** zone. **Note:** The default adjustment type selected in the refund request type should be an adjustment type where the A/P request type code is defined.

The **Confirm Adjustment Type** window appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Request Information	Displays information about the refund request	Not applicable
Adjustment Type	Used to indicate the adjustment type using which the refund adjustment should be created.	No

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The **Search** (🔍) icon appears corresponding to this field. On clicking the **Search** icon the **Adjustment Type Search** window appears. On specifying the adjustment type, the description of the adjustment type appears corresponding to the **Adjustment Type Search** field.	

7. Modify the adjustment type, if required.
8. Click **OK**.
   A message appears indicating that the selected bills are successfully added to the refund request.

Note:

If you select the bill (with credit balance) which contains one or more debit line items or if you select the bill (with debit balance) which contains one or more credit line items, the system will not allow you to add the credit line items by directly adding the respective bill. In such case, you need to individually select the credit bill segments and bill adjustments, and add them to the refund request.

The system allows you to add the credit bill segments or bill adjustments in the **Refund Details** zone, irrespective of whether you select the credit bill, or credit bill segments, or bill adjustments.

To view the line items of the bill, click the **Broadcast** (📡) icon corresponding to the respective bill in the **Search Results** section.

The system will not allow you to add a debit line item to the **Refund Details** zone.

Related Topics

For more information on...	See...
How to create a refund request	Creating a Refund Request on page 1774

Adding a Credit Bill Line Item to the Refund Request

You can refund the credit bill line items such as bill segments and adjustments of the account. While adding a credit bill line item to the refund request, you can either:

- Directly add all the credit line items of a bill to the refund request by adding the bill that contains all the bill segments and respective adjustments which have a credit balance.
- Individually add a credit bill segment or an adjustment of a bill (with one or more credit line items) to the refund request.

Prerequisites

To add a credit bill line item to the refund request, you should have:

- Bills that are in the **Complete** status for an account with one or more credit line items.

Procedure

To add a credit bill line item to the refund request:

1. Search for the refund request in the **Refund/Write Off Request** screen.

Note: The refund request must be in the **Draft** status.

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2. In the **Search Results** section, click the link in the **Refund/Write Off Request** column corresponding to the refund request whose details you want to edit.
   The **Refund Request** screen appears.
3. Ensure that the **Bills** tab is selected.

> **Note:** If the bills are already listed in the **Search Results** section, you can directly begin from step 6, else resume from step 4.

4. Click the **Expand Filter** button and enter the search criteria in the **Search Bills** zone.

> **Note:** ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.

5. Click **Search**.
   A list of bills that meet the search criteria appears in the **Search Results** section.
6. Do either of the following:

If...	Then...
A bill has all the credit line items and you want to add a particular credit bill line item to the refund request	**a.** In the **Search Results** section, click the **Broadcast** (ᯤ) icon corresponding to the bill whose bill line items you want to view. The **Bill Line Items** zone appears. **b.** Select the check box corresponding to the credit bill segment or bill adjustment that you want to add in the refund request. **Note:** You can also select multiple credit bill segments or bill adjustments at the same time. In addition, you can select the check box corresponding to the column header. This allows you to add all the credit bill segments or bill adjustments listed in the **Search Results** section to the refund request. **c.** Click the **Add** button in the **Search Bills** zone.
A bill has a credit balance and contains one or more debit line items	**a.** In the **Search Results** section, click the **Broadcast** (ᯤ) icon corresponding to the bill whose bill line items you want to view. The **Bill Line Items** zone appears. **b.** Select the check box corresponding to the credit bill segment or bill adjustment that you want to add in the refund request. **Note:** You can also select multiple credit bill segments or bill adjustments at the same time. In addition, you can select the check box corresponding to the column header. This allows you to add all the credit bill segments or bill adjustments listed in the **Search Results** section to the refund request. **c.** Click the **Add** button in the **Search Bills** zone.
A bill has debit balance and contains one or more credit line items	**a.** In the **Search Bills** zone, click the **Broadcast** (ᯤ) icon corresponding to the bill whose line items you want to view. The **Bill Line Items** zone appears. **b.** Select the check box corresponding to the credit bill segment or bill adjustment that you want to add in the refund request.

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If...	Then...
	Note: You can also select multiple credit bill segments or bill adjustments at the same time. In addition, you can select the check box corresponding to the column header. This allows you to add all the credit bill segments or bill adjustments listed in the **Search Results** section to the refund request. **c.** Click the **Add** button in the **Search Bills** zone.

The **Confirm Adjustment Type** window appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Request Information	Displays information about the refund request	Not applicable
Adjustment Type	Used to indicate the adjustment type using which the refund adjustment should be created. **Note:** The **Search** (🔍) icon appears corresponding to this field. On clicking the **Search** icon the **Adjustment Type Search** window appears. On specifying the adjustment type, the description of the adjustment type appears corresponding to the **Adjustment Type Search** field.	No

7. Modify the adjustment type, if required.
8. Click **OK**.
   A message appears indicating that the selected bill segments or bill adjustments are successfully added to the refund request.

Note:

The credit bill segments or bill adjustments are added in the **Refund Details** zone in the **Main** tab of the **Refund Request** screen.

If a refund request is currently in progress for a credit bill segment or bill adjustment, then bills of the respective account are not listed in the **Search Bills** zone. In addition, a bill with all the debit line items is also not listed in the **Search Bills** zone.

If you select a bill (with credit balance) which contains one or more debit line items or if you select a bill (with debit balance) which contains one or more credit line items, the system will not allow you to add the credit line items by directly adding the bill. In such case, you need to individually select the credit bill segments and bill adjustments, and then add them to the refund request.

The system adds the credit bill segments or bill adjustments to the **Refund Details** zone, irrespective of whether you select a credit bill, or credit bill segments, or bill adjustments.

The system will not allow you to add a debit line item to the **Refund Details** zone.

Related Topics

For more information on...	See...
How to create a refund request	Creating a Refund Request on page 1774

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Editing a Refund Request

Prerequisites

To edit a refund request, you should have:

- Adjustment types defined in the application where the **A/P Request Type Code** flag is set to **Refund**.

Procedure

To edit a refund request:

1. Search for the refund request in the **Refund/Write Off Request** screen.
2. In the **Search Results** section, click the link in the **Refund/Write Off Request Information** column corresponding to the refund request whose details you want to edit.
   The **Refund Request** screen appears.
3. Click the **Edit** button in the **Record Actions** section.

   The **Edit Refund Request** screen appears. It contains the following sections:

   - **Main** - Used to specify the basic details for the refund request.
   - **Characteristics** - Used to define the characteristics for the refund request.

   The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Refund Request Information	Displays information about the refund request.	Not applicable
Account Information	Indicates the account for which the refund request is created. **Note:** By default, this field is disabled. The respective account ID appears in this field where additional information about the account appears corresponding to the **Account Information** field.	Not applicable
Person Name	Used to indicate the person for whom the refund request is created. **Note:** The system maintains a log when you edit the person name in a refund request. A log is created in the following format: `Person Name is changed; Old Value: ' <OLD NAME>; New Value: <NEW NAME>`	No
Override Address	Used to indicate whether the account's mailing address must be overridden.	No

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Field Name	Field Description	Mandatory (Yes or No)
	Note: By default, the address of the account's main customer appears in the following fields, such as, Address Line 1, Address Line 2, Address Line 3, Address Line 4, City, Country, State, and Postal. You can override the address in these fields, if required. The system maintains a log when you edit the address in a refund request. A log is created in the following format: `Address is changed; Old Value: ' <OLD ADDRESS>; New Value: <NEW ' ADDRESS>`	
Enter Address Manually	Used to manually enter or edit the address fields, such as, Address Line 1, Address Line 2, Address Line 3, Address Line 4, City, Country, State, and Postal.	No
Address Line 1	Used to specify the house number and apartment name. **Note:** This field is enabled only when you select the **Override Address** and **Enter Address Manually** options.	No
Address Line 2	Used to specify the street name. **Note:** This field is enabled only when you select the **Override Address** and **Enter Address Manually** options.	No
Address Line 3	Used to specify the landmark, if available. **Note:** This field is enabled only when you select the **Override Address** and **Enter Address Manually** options.	No
Address Line 4	Used to specify the village, town, or city name. **Note:** This field is enabled only when you select the **Override Address** and **Enter Address Manually** options.	No
City	Used to specify the city name.	No
Country	Used to specify the country name.	No
State	Used to specify the state name.	No
Postal	Used to specify the postal or zip code.	No
Comments	Used to specify additional information about the refund request.	No

4. Modify the details of the refund request, if required.
5. Define, edit, or remove characteristics of the refund request, if required.
6. Click **Save**.
   The changes made to the refund request are saved.

Related Topics

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For more information on...	See...
How to search for a refund request	Searching for a Refund or Write Off Request on page 1773
Refund Request screen	Refund Request (Used for Viewing) on page 1780
Refund Request zone	Refund Request on page 1780
How to define a characteristic for a refund request	Defining a Characteristic for a Refund Request on page 1795

Editing the Refund or Bill Line Item Details

Prerequisites

To edit the refund or bill line item details, you should have:

- Adjustment types with A/P request type code defined in the application.

Procedure

To edit the refund or bill line item details:

1. Search for the refund request in the **Refund/Write Off Request** screen.
2. In the **Search Results** section, click the link in the **Refund/Write Off Request** column *c*orresponding to the refund request whose refund or bill line item details you want to edit.
   The **Refund Request** screen appears. You can edit the refund or bill line items by either of the following ways:

If...	Then
You select the check box corresponding to the respective bill whose details *y*ou want to edit and click the **Edit** button available in the upper left corner of the **Refund Details** zone.	The **Edit Request Details** screen appears.
You click the **Broadcast** (((•))) icon corresponding to the respective bill in the **Refund Details** zone.	The **Bill Line Items** zone appears. **a.** Select the check box corresponding to the respective bill line item whose details *y*ou want to edit and click the **Edit** button available in the upper left corner of the **Bill Line Items** zone. The **Edit Request Details** screen appears.
	Note: This zone appears when the entity type is set to **Bill**. You can edit a bill line item from the refund request only when the refund request is in the **Draft** status.

Note: The **Edit Request Details** screen is a common screen used when you are editing the refund or bill line item details of a refund request.

The **Edit Request Details** screen contains the following fields:

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Field Name	Field Description	Mandatory (Yes or No)
Request ID	Displays the refund request ID.	Not applicable
Account Information	Displays additional information about the account.	Not applicable
Adjustment Type	Indicates the adjustment type for the refund request type. **Note:** You can search for an adjustment type by clicking the **Search**(🔍) icon corresponding to this field. On clicking the **Search** icon the **Adjustment Type Search** window appears. On specifying the adjustment type, the description of the adjustment type appears corresponding to the **Adjustment Type Search** field.	No

In addition to the above columns, the screen has following button:

Button Name	Button Description
Override	Used to override an adjustment type of the refund request.

In addition to the above fields, this screen contains following columns:

Column Name	Column Description
Entity Type	Indicates the entity type. The valid values are: • Adjustments • Bill • Bill Segment • Payment Event • Payment
Entity ID	Displays the entity ID.
Entity Amount	Displays the bill segment or adjustment amount.
Currency	Displays the currency in which the entity was created.
Request Amount	Displays the bill segment or adjustment amount which is eligible for refund. The system calculates the request amount using the following formula: `Request Amount = Entity Amount-Refund Amount` **Note:** In case the bill segment or adjustment has a debit balance, the eligible amount for refund would be zero.
Adjustment Type	Indicates the adjustment type using which the refund adjustment must be created.

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Column Name	Column Description
	Note: By default, this field displays the adjustment type which is already associated with the respective refund request. You can search for an adjustment type by clicking the **Search**(🔍) icon corresponding to this field. On clicking the **Search** icon the **Adjustment Type Search** window appears. On specifying the adjustment type, the description of the adjustment type appears corresponding to the **Adjustment Type Search** field.
Bill ID	Displays the bill ID.

Note:

Pagination is used to display limited number of records in the **Search Results** section. By default, 10 records are displayed in the **Search Results** section. You can change the number of records displayed per page, if required. You can use the navigation buttons, such as **First** (<<), **Previous** (<), **Next** (>), and **Last** (>>) to navigate between pages. You can also select the page to which you want to navigate from the **Go To** list.

The values appear in the **Page Limit** list when you define values for the **PAGE_NUMBER** lookup field.

3. Modify the details of the refund or bill line items.
4. Click **Save**.
   The changes made to the refund or bill line items are saved.

Related Topics

For more information on...	See...
Refund Request screen	Refund Request (Used for Viewing) on page 1780
Refund Request zone	Refund Request on page 1780
How to search for a refund request	Searching for a Refund or Write Off Request on page 1773

Deleting a Refund Request

Procedure

To delete a refund request:

1. Search for the refund request in the **Refund/Write Off Request** screen.
2. In the **Search Results** section, click the link in the **Refund/Write Off Request** column corresponding to the refund request that you want to delete.
   The **Refund Request** screen appears.
3. Click the **Delete** button in the **Refund Request** zone.
   A message appears confirming whether you want to delete the refund request.

Note: The **Delete** button appears when the refund request is in the **Draft** status.

4. Click **OK**.
   The refund request is deleted.

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Related Topics

For more information on...	See...
How to search for a refund request	Searching for a Refund or Write Off Request on page 1773
Refund Request screen	Refund Request (Used for Viewing) on page 1780
Refund Request zone	Refund Request on page 1780

Deleting a Bill from the Refund Request

Procedure

To delete a bill from the refund request:

1. Search for the refund request in the **Refund/Write Off Request** screen.
2. In the **Search Results** section, click the link in the **Refund/Write Off Request** column *c*orresponding to the refund request whose bill you want to delete.
   The **Refund Request** screen appears.
3. In the **Refund Details** zone, select the records where the entity type is **Bill** and click the **Delete** button available in the upper left corner *o*f the **Refund Details** zone.
   A message appears confirming whether you want to delete the bill from the refund request.

> **Note:** You can delete bills from the refund request when the refund request is in the **Draft** status.

4. Click **OK**.
   The selected bills are deleted from the refund request.

Related Topics

For more information on...	See...
Refund Request screen	Refund Request (Used for Viewing) on page 1780
Refund Request zone	Refund Request on page 1780
How to search for a refund request	Searching for a Refund or Write Off Request on page 1773

Deleting a Bill Line Item from the Refund Request

Procedure

To delete a bill line item from the refund request:

1. Search for the refund request in the **Refund/Write Off Request** screen.
2. In the **Search Results** section, click the link in the **Refund/Write Off Request** column *c*orresponding to the refund request whose bill line items you want to delete.
   The **Refund Request** screen appears.
3. In the **Refund Details** zone, click the **Broadcast** (📡) icon corresponding to the bill whose bill line items *y*ou want to delete.
   The **Bill Line Items** zone appears.
4. In the **Bill Line Items** zone, select the bill line items which you want to delete and click the **Delete** button *a*vailable in the upper left corner of the **Bill Line Items** zone.
   A message appears confirming whether you want to delete the bill line items from the refund request.

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> **Note:**
>
> You can delete the bill line items from the refund request when the refund request is in the **Draft** status.

5. Click **OK**.
   The selected bill line items are deleted from the refund request.

Related Topics

For more information on...	See...
Refund Request screen	Refund Request (Used for Viewing) on page 1780
Refund Request zone	Refund Request on page 1780
How to search for a refund request	Searching for a Refund or Write Off Request on page 1773

Submitting a Refund Request

Prerequisites

To submit a refund request, you should have:

- Payment events, payments, or credit bill line items added in the refund request

Procedure

To submit a refund request:

1. Search for the refund request in the **Refund/Write Off Request** screen.
2. In the **Search Results** section, click the link in the **Refund/Write Off Request** column *c*orresponding to the refund request that you want to submit.
   The **Refund Request** screen appears.
3. Click the **Submit** button in the **Refund Request** zone.

   The system behaves in the following manner:

If...	Then...
The **Approval Required** and **Hierarchical Approval** check boxes are selected in the refund request type using which the refund request is created	A To Do of the **C1-REFRQ** To Do type is created and sent to the approver at the first level in the approval hierarchy, and the status of the refund request is changed to **Approval In Progress**.
The **Approval Required** check box is selected, but the **Hierarchical Approval** check box is not selected in the refund request type using which the refund request is created	A To Do of the **C1-REFRQ** To Do type is created and sent to the approver at the hierarchy level where the total refund amount falls within the threshold limit. In addition, the status of the refund request is changed to **Approval In Progress**.
The **Approval Required** check box is not selected in the refund request	The refund adjustments are created using the specified adjustment types and the status of the refund request is changed to **Processed**.

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If...	Then...
type using which the refund request is created	**Note:** The refund adjustments are created in the **Frozen** status. If a match event is present for the credit bill line items (such as bill segments and adjustments) and for the payments which are matched against the excess credit contract, the existing match event is stamped on the refund adjustments and on the corresponding financial transactions. However, when a match event is not present for the payments which are matched against the suspense contract or if the match events does not exist, a new match event is created and stamped on the refund adjustments and on the corresponding financial transactions. If you are doing a partial refund for any entity, the corresponding match event status is set to **Open**. However, if you are refunding the entire eligible amount, the corresponding match event status is set to **Balanced**.
The total refund amount is less than minimum refund amount	The write up adjustment is created using the write up adjustment type specified in the refund request type. In addition, the status of the refund request is changed to **Processed**.
	Note: The write up adjustment is created in the **Frozen** status. If a match event is present for the credit bill line items (such as bill segments and adjustments) and for the payments which are matched against the excess credit contract, the existing match event is stamped on the write up adjustment and on the corresponding financial transaction. However, when a match event is not present for the payments which are matched against the suspense contract or if the match events does not exist, a new match event is created and stamped on the write up adjustment and on the corresponding financial transaction. If you are doing a partial refund for any entity, the corresponding match event status is set to **Open**. However, if you are refunding the entire eligible amount, the corresponding match event status is set to **Balanced**.
The total refund amount is less than the minimum threshold amount	The refund request is automatically approved by the system and refund adjustments are created using the specified adjustment types. In addition, the status of the refund request is changed to **Processed**.

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If...	Then...
	Note: The refund adjustments are created in the **Frozen** status. If a match event is present for the credit bill line items (such as bill segments and adjustments) and for the payments which are matched against the excess credit contract, the existing match event is stamped on the refund adjustments and on the corresponding financial transactions. However, when a match event is not present for the payments which are matched against the suspense contract or if the match events does not exist, a new match event is created and stamped on the refund adjustments and on the corresponding financial transactions. If you are doing a partial refund for any entity, the corresponding match event status is set to **Open**. However, if you are refunding the entire eligible amount, the corresponding match event status is set to **Balanced**.

Note: The **Submit** button appears when the refund request is in the **Draft** status.

Related Topics

For more information on...	See...
How to search for a refund request	Searching for a Refund or Write Off Request on page 1773
Refund Request screen	Refund Request (Used for Viewing) on page 1780
Refund Request zone	Refund Request on page 1780

Approving a Refund Request

You can view the number of refund requests which are pending for approval in the **Refund/Write Off Request** screen. The approver can review, and accordingly approve or reject the refund request based on the observations.

Note: The system will not allow you to approve or reject a refund request submitted by you.

Procedure

To approve a refund request:

1. Do either of the following:

If you want to...	Then...
Approve a refund request through the Refund/ Write Off Request screen	**a.** Search for the refund request in the **Refund/Write Off Request** screen. **b.** In the **Search Results** section, click the link in the **Refund/Write Off Request** column corresponding to the refund request which you want to review.
Approve a refund request from the To Do List screen	**a.** Click the **Menu** link in the **Application** toolbar. A list appears. **b.** From the **Main** menu, select **To Do** and then click **To Do List**. The **To Do Type for User Search** window appears. **c.** Enter **C1-REFRQ** in the **To Do Type** field. **d.** Click the **Search** button corresponding to the **To Do Type** field.

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If you want to...	Then...
	The **To Do List** screen appears. **e.** Select the **Open** option from the **Filter by** list to view all unassigned To Dos. **f.** Click the link in the **Message** column corresponding to the To Do of the refund request that you want to review.

The **Refund Request** screen appears.

2. Review the details in the **Refund Request** screen.
3. If the information in the refund request is accurate, click the **Approve** button in the **Refund Request** zone.

The system behaves in the following manner:

If...	Then
The **Hierarchical Approval** check box is selected in the refund request type using which the refund request is created and the total refund amount is greater than the threshold amount specified at the next level in the approval hierarchy	A To Do of the **C1-REFRQ** To Do type is created and sent to the approver at the next level in the approval hierarchy, and the status of the refund request remains as **Approval In Progress**.
The **Hierarchical Approval** check box is selected in the refund request type using which the refund request is created and the total refund amount is less than the threshold amount specified at the next level in the approval hierarchy	The refund adjustments are created using the specified adjustment types and the status of the refund request is changed to **Processed**.
	Note: The refund adjustments are created in the **Frozen** status. If a match event is present for the credit bill line items (such as bill segments and adjustments) and for the payments which are matched against the excess credit contract, the existing match event is stamped on the refund adjustments and on the corresponding financial transactions. However, when a match event is not present for the payments which are matched against the suspense contract or if the match events does not exist, a new match event is created and stamped on the refund adjustments and on the corresponding financial transactions. If you are doing a partial refund for any entity, the corresponding match event status is set to **Open**. However, if you are refunding the entire eligible amount, the corresponding match event status is set to **Balanced**.
The **Hierarchical Approval** check box is not selected in the refund	The refund adjustments are created using the specified adjustment types and the status of the refund request is changed to **Processed**.

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If...	Then
request type using which the refund request is created	**Note:** The refund adjustments are created in the **Frozen** status. If a match event is present for the credit bill line items (such as bill segments and adjustments) and for the payments which are matched against the excess credit contract, the existing match event is stamped on the refund adjustments and on the corresponding financial transactions. However, when a match event is not present for the payments which are matched against the suspense contract or if the match events does not exist, a new match event is created and stamped on the refund adjustments and on the corresponding financial transactions. If you are doing a partial refund for any entity, the corresponding match event status is set to **Open**. However, if you are refunding the entire eligible amount, the corresponding match event status is set to **Balanced**.

Note: The **Approve** button appears when:

- The refund request is in the **Approval In Progress** status.
- A user with the approval To Do role is reviewing the refund request.

Related Topics

For more information on...	See...
How to search for a refund request	Searching for a Refund or Write Off Request on page 1773
Refund Request screen	Refund Request (Used for Viewing) on page 1780
Refund Request zone	Refund Request on page 1780

Rejecting a Refund Request

Prerequisites

To reject a refund request, you should have:

- Rejection reasons defined in the application

Note:

While rejecting a refund request, you need to specify the reason why you want to reject the refund request. You can select the appropriate rejection reason when you have defined the reasons for the **Rejected** status of the **C1-RefundReq** business object in the **Status Reason** screen.

The system will not allow you to approve or reject a refund request submitted by you.

Procedure

To reject a refund request:

1. Do either of the following:

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If you want to...	Then...
Reject a refund request through the Refund/ Write Off Request screen	**a.** Search for the refund request in the **Refund/Write Off Request** screen. **b.** In the **Search Results** section, click the link in the **Refund/Write Off Request** column corresponding to the refund request which you want to review.
Reject a refund request from the To Do List screen	**a.** Click the **Menu** link in the **Application** toolbar. A list appears. **b.** From the **Main** menu, select **To Do** and then click **To Do List**. The **To Do List** screen appears. **c.** Enter the **C1-REFRQ** To Do Type in the **To Do Type** field. **d.** Click the **Search** (🔍) icon corresponding to the **To Do Type** field. The **To Do Type for User Search** window appears. **e.** In the **To Do Type for User Search** window, enter the **C1-WOREQ** To Do Type in the **To Do Type** field and click the **Search** button. **f.** Select the **Open** option from the **Filter by** list to view all unassigned To Dos. **g.** Click the link in the **Message** column corresponding to the To Do of the refund request that you want to review.

The **Refund Request** screen appears.

2. Review the details in the **Refund Request** screen.
3. If the information in the refund request is incorrect, click the **Reject** button in the **Refund Request** zone.

   The **Reject Refund Request** window appears. It contains following fields:

Field Name	Field Description	Mandatory (Yes or No)
Status Reason	Used to indicate the reason why you want to reject the refund request.	Yes
Comments	Used to specify additional information while rejecting the refund request.	No

Note: The **Reject** button appears when:

- The refund request is in the **Approval In Progress** status.
- A user with the approval To Do role is reviewing the refund request.

4. Select the rejection reason from the **Status Reason** list.
5. Click **Save**.
   The status of the refund request is changed to **Rejected**.

Related Topics

For more information on...	See...
How to search for a refund request	Searching for a Refund or Write Off Request on page 1773
Refund Request screen	Refund Request (Used for Viewing) on page 1780
Refund Request zone	Refund Request on page 1780

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Viewing the Log of a Refund Request

Procedure

To view the log of a refund request:

1. Search for the refund request in the **Refund/Write Off Request** screen.
2. In the **Search Results** section, click the link in the **Refund/Write Off Request** column *c*orresponding to the refund request whose log you want to view.
   The **Refund Request** screen appears.
3. Click the **Log** tab.
4. View the log of the refund request in the **Refund Request Log** zone.

> **Note:** You can manually add a log entry for the refund request by clicking the **Add Log Entry** link in the upper right corner of the **Refund Request Log** zone.

Related Topics

For more information on...	See...
How to search for a refund request	Searching for a Refund or Write Off Request on page 1773
How to add a log entry for a refund request	Adding a Log Entry for a Refund Request on page 1816
Refund Request Log zone	Refund Request Log on page 1795

Adding a Log Entry for a Refund Request

Procedure

To add a log entry for a refund request:

1. Search for the refund request in the **Refund/Write Off Request** screen.
2. In the **Search Results** section, click the link in the **Refund/Write Off Request** column *c*orresponding to the refund request whose log you want to edit.
   The **Refund Request** screen appears.
3. Click the **Log** tab.
   The **Log** tab appears.
4. Click the **Add Log Entry** link in the upper right corner of the **Refund Request Log** zone.

   The **Add Request Log** window appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Request Information	Displays information about the refund request.	Not applicable
Log Details	Used to specify additional comments for the refund request.	Yes

5. Enter the comments in the **Log Details** field.
6. Click **Save**.
   The log entry is added in the **Refund Request Log** zone.

Related Topics

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For more information on...	See...
How to search for a refund request	Searching for a Refund or Write Off Request on page 1773
Refund Request screen	Refund Request (Used for Viewing) on page 1780
Log tab	Refund Request - Log on page 1795

Voiding a Refund Request

There might be situations when incorrect refund request is processed in the system. In such case, the system provides you with an ability to void or cancel the refund request. However, note that you can void a refund request when the refund request is in the **Processed** status.

Prerequisites

To void a refund request, you should have:

- Void reasons defined in the application

Note: While voiding a refund request, you need to specify the reason why you want to void the refund request. You can select the appropriate void reason when you have defined the reasons for the **Voided** status of the **C1-RefundReq** business object in the **Status Reason** screen.

Procedure

To void a refund request:

1. Search for the refund request in the **Refund/Write Off Request** screen.
2. In the **Search Results** section, click the link in the **Refund/Write Off Request** column *c*orresponding to the refund request that you want to void.
   The **Refund Request** screen appears.
3. Click the **Void** button in the **Refund Request** zone.

   The **Void Reason** window appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Status Reason	Used to indicate the reason why you want to void the refund request.	Yes
Comments	Used to specify additional information while voiding the refund request.	No

   Note: The **Void** button appears when the refund request is in the **Processed** status.
4. Select the void reason from the **Status Reason** list.
5. Click **Save**.
   The status of the refund request is changed to **Voided**.

Note: The **C1-REFVOID** algorithm cancels all the frozen adjustments that are created for the refund request which is in the **Processed** status.

Related Topics

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For more information on...	See...
How to search for a refund request	Searching for a Refund or Write Off Request on page 1773
Refund Request screen	Refund Request (Used for Viewing) on page 1780
Refund Request zone	Refund Request on page 1780

Write Off Request (Used for Viewing)

Once you create a write off request, the **Write Off Request** screen allows you to:

- Edit and delete a write off request
- View the details of a write off request
- Submit a write off request for approval
- Approve or reject a write off request
- View the log of a write off request
- Add a log entry for a write off request
- Cancel a write off request

This screen consists of the following tabs:

- Write Off Request - Main on page 1818
- Write Off Request - Bills on page 1823

> **Note:** The **Bills** tab appears when the write off request is in the **Draft** status.

- Write Off Request - Log on page 1826

Write Off Request - Main

The **Main** tab displays information about the write off request. It contains the following zones:

- Write Off Request on page 1818
- Write Off Details on page 1820
- Bill Line Items on page 1822

Write Off Request

The **Write Off Request** zone displays the details of the write off request. This zone contains the following sections:

- **Main** - This section provides basic information about the write off request. It contains the following fields:

Field Name	Field Description
Write Off Request Information	Displays information about the write off request.
Write Off Request Type	Indicates the write off request type using which the write off request is created. **Note:** It has a link. On clicking the link, the **Refund/Write Off Request Type** screen appears where you can view the details of the write off request type.
Status	Indicates the status of the write off request. The valid values are: • Approval In Progress

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Field Name	Field Description
	• Cancelled • Deferred Cancel • Deferred Processing • Deferred Void • Draft • Hold • Processed • Rejected • Voided
Status Reason	Indicates the reason why the write off request is rejected or cancelled.
	Note: This field appears when the write off request is in the **Rejected** or **Canceled** status. It has a link. On clicking the link, the **Status Reason** screen appears where you can view the details of the rejected or canceled reason.
Account Information	Indicates the account for which the write off request is created.
	Note: It has a link. On clicking the link, the **Account** screen appears where you can view the details of the respective account.
Comments	Displays additional information about the write off request.
Total Write Off Amount	Displays the total write off amount.
Adjustment Level	Indicates the adjustment level for which you want to create the write off request.

- **Characteristics** - Lists the characteristics defined for the write off request. It contains the following fields:

Field Name	Field Description
Effective Date	Indicates the date from when the characteristic is effective for the write off request.
Characteristic Type	Indicates the characteristic type.
Characteristic Value	Displays the value of the characteristic type.

- **Record Actions** - This section contains the following buttons:

Button Name	Button Description
Edit	Used to edit the details of the write off request.
	Note: The **Edit** button appears when the write off request is in the **Draft** status.
Delete	Used to delete the write off request.
	Note: The **Delete** button appears when the write off request is in the **Draft** status.
Submit	Used to submit the write off request for approval.
	Note: The **Submit** button appears when the write off request is in the **Draft** status.
Approve	Used to approve the write off request.

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Button Name	Button Description
	Note: The **Approve** button appears when: • The write off request is in the **Approval In Progress** status. • A user with the approval To Do role is reviewing the write off request.
Reject	Used to reject the write off request.
	Note: The **Reject** button appears when: • The write off request is in the **Approval In Progress** status. • A user with the approval To Do role is reviewing the write off request.
Cancel	Used to cancel the write off request.
	Note: The **Cancel** button appears when the write off request is in the **Processed** status.

- **Record Information** - This section contains the following fields:

Field Name	Field Description
Business Object	Indicates the business object using which the write off request is created. In addition, a context menu appears corresponding to this field which helps in navigating to other screens in the application.
	Note: It has a link. On clicking the link, the **Business Object** screen appears where you can view the details of the respective business object.
Status Date/Time	Displays the date and time when the write off request status is updated.
Create Date/Time	Displays the date and time when the write off request is created..

Write Off Details

The **Write Off Details** zone lists the debit bill line items (such as bill segments and adjustments) that you have added to the write off request. This zone contains the following columns:

Column Name	Column Description
Entity ID	Displays the entity ID.
Entity Type	Indicates whether the entity is a bill, bill segment or an adjustment.
Currency	Indicates the currency in which the entity was created.
Entity Amount	Displays the entity amount.
Write Off Amount	Displays the amount that must be written off.
	Note: By default, the amount eligible for write off appears in this column. You can edit the amount, if required. However, you cannot specify the amount greater than the eligible amount.
Contract Information	Displays additional information about the contract against which the bill segment or adjustment is created. In addition, a context menu (⊙) icon appears corresponding to this field which helps in navigating to other screens in the application.

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Column Name	Column Description
	Note: It has a link. On clicking the link, the **Contract** screen appears where you can view the details of the respective contract.
Adjustment Type	Indicates the adjustment type using which the write off adjustment must be created.
	Note: By default, the adjustment type specified in the write off request type appears in this column. You can change the adjustment type, if required, by editing the write off request.
Adjustment Information	Displays additional information about the write off adjustment.
	Note: It has a link. On clicking the link, the **Adjustment** screen appears where you can view the details of the respective adjustment. The data appears in this column when the status of the write off request is **Processed**. The information string appears when an algorithm of the **C1-ADI-INFO** algorithm type is attached to the **Adjustment Information** system event in the **Algorithms** tab of the **Installation Options - Framework** screen.
Bill Information	Displays additional information about the bill. In addition, a context menu (⊙) icon appears corresponding to this field which helps in navigating to other screens in the application.
	Note: It has a link. On clicking the link, the **Bill** screen appears with the details of the respective bill.

In addition to above columns, this screen contains following buttons:

Button Name	Button Description
Edit	Used to edit the details of bill line items.
Delete	Used to delete the bill line items.

Note:

Pagination is used to display limited number of records in the **Search Results** section. You can use the navigation links, such as **Previous** and **Next** to navigate between pages. Note that the navigation links appear in the **Search Results** section only when the records in the search results exceed 20.

A check box appears corresponding to each write off record. To update the details of a write off record, select the check box corresponding to the write off record and then click the **Edit** button. You can also select multiple write off records at the same time. You can select one or more write off records and click either the **Edit** or **Delete** button in this zone to perform the respective action. In addition, you can select the check box corresponding to the column header. This allows you to select all the write off records listed in the respective zone.

To delete a write off request, select the check box corresponding to the write off record and click the **Delete** button. You can also select multiple write off records at the same time.

You can filter the list using the **Entity Type** and **Entity Amount** field available in the **Filter** area. By default, the **Filter** area is hidden. You can view the **Filter** area by clicking the **Filters** (⧩) icon in the upper right corner of this zone.

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Bill Line Items

The **Bill Line Items** zone lists the debit and credit bill segments, and adjustments of a bill. This zone contains the following columns:

Column Name	Column Description
Bill ID	Displays the bill ID.
Entity ID	Displays the bill segment or adjustment ID.
Entity Type	Indicates whether the entity is a bill, bill segment or an adjustment.
Currency	Displays the currency in which the entity was created.
Entity Amount	Displays the bill segment or adjustment amount.
Write Off Amount	Displays the bill segment or adjustment amount which is eligible for write off. The system calculates the request amount using the following formula: `Request Amount = Entity Amount-Write Off Amount` **Note:** If the bill segment or adjustment has credit balance, the eligible amount for write off would be zero.
Contract Information	Displays additional information about the contract against which the bill segment or adjustment is created. In addition, a context menu ( ) icon appears corresponding to this field which helps in navigating to other screens in the application. **Note:** It has a link. On clicking the link, the **Contract** screen appears where you can view the details of the respective contract.
Adjustment Type	Indicates the adjustment type using which the write off adjustment must be created. **Note:** It has a link. On clicking the link, the **Adjustment Type** screen appears where you can view the details of the respective adjustment type.
Adjustment Information	Displays information about the refund adjustment. **Note:** It has a link. On clicking the link, the **Adjustment** screen appears where you can view the details of the respective adjustment. The data appears in this column only when the status of the write off request is **Processed**. The information string appears when an algorithm of the **C1-ADI-INFO** algorithm type is attached to the **Adjustment Information** system event in the **Algorithms** tab of the **Installation Options - Framework** screen.

In addition to above columns, this screen contains following buttons:

Button Name	Button Description
Edit	Used to edit the details of bill line items.
Delete	Used to delete the bill line items.

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Pagination is used to display limited number of records in the **Search Results** section. You can use the navigation links, such as **Previous** and **Next** to navigate between pages. Note that the navigation links appear in the **Search Results** section only when the records in the search results exceed 20.

By default, the **Bill Line Items** zone does not appear in the **Write Off Request** screen. It appears only when you click the **Broadcast** (ᯤ) icon in the **Write Off Details** zone corresponding to the entity type where the entity type is set to **Bill**.

A check box appears corresponding to each bill line item. To add a bill line item to the write off request, click the check box corresponding to the bill line item and click the **Add** button. You can also select multiple bill line items at the same time. In addition, you can select the check box corresponding to the column header. This allows you to select all the bill line items listed in the respective zone. For more information, see Adding a Debit Bill to the Write Off Request on page 1828

You can filter the list using the **Entity Type** and **Entity Amount** field available in the **Filter** area. By default, the **Filter** area is hidden. You can view the **Filter** area by clicking the **Filters** (⧩) icon in the upper right corner of this zone.

Write Off Request - Bills

The **Bills** tab allows you to search bills with debit line items, such as debit bill segments and adjustments, that you want to write off. It contains the following zones:

- Search Bills on page 1823
- Bill Line Items on page 1825

Search Bills

The **Search Bills** zone allows you to search for bills using various search criteria. It also lists the completed bills of the account which either have a debit balance or have one or more debit line items, such as bill segments and adjustments. This zone contains the following two sections:

- **Search Criteria** - The **Search Criteria** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Search By	Used to indicate whether you want to search for a bill using bill or bill and price item details. The valid values are: • Bill Details • Bill and Price Item Details **Note:** By default, the **Bill Details** option is selected.	Yes
Bill ID	**Note:** The **Search** icon appears corresponding to the **Bill ID** field. On clicking the **Search** icon the **Bill Search** window appears.	No
Bill Date From	Used to search for bills which are created on or after the specified date. **Note:** You can either manually specify the date or select it using the **Date Picker** (📅) icon corresponding to the field. The bill date from date cannot be later than the bill date to date.	No
Bill Date To	Used to search for bills which are created till a particular date.	No

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Field Name	Field Description	Mandatory (Yes or No)
	Note: You can either manually specify the date or select it using the **Date Picker** ( ) icon corresponding to the field. The bill date to date cannot be earlier than the bill date from date.	
Price Item	Used to search for bills which are created for a particular price item.	No
	Note: This field appears when you select **Bill and Price Item Details** option from the **Search By** list. You can search for a price item by clicking the **Search** () icon corresponding to the **Price Item** field. On clicking the **Search** icon the **Price Item Search** window appears.	

- **Search Results** - On clicking the **Search** button, the search results are filtered based on the specified search criteria. The **Search Results** section contains the following columns:

Column Name	Column Description
Bill ID	Displays the bill ID.
Bill Information	Displays additional information about the bill. In addition, a context menu ( ) icon appears corresponding to this field which helps in navigating to other screens in the application.
	Note: It has a link. On clicking the link, the **Bill** screen appears with the details of the respective bill.
Amount	Displays the total amount of the bill.

In addition to above columns, this screen contains following button:

Button Name	Button Description
Add	Used to add a bill to the write off request.

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Note:

On clicking the **Broadcast** ( ) icon corresponding to the bill, the **Bill Line Items** zone appears where you can view the details of the respective bill.

A check box appears corresponding to each bill. To add a bill to the write off request, click the check box corresponding to the bill and click the **Add** button. You can also select multiple bills at the same time. In addition, you can select the check box corresponding to the column header. This allows you to select all the bills listed in the respective zone. For more information, see Adding a Debit Bill to the Write Off Request on page 1828.

If you want to write off a bill with debit balance (including all the credit line items of the respective bill) you need to select the check box corresponding to the bill and then click the **Add** button in the **Search Results** section. All debit bill segments and bill adjustments are added in the **Write Off Details** zone in the **Main** tab of the **Write Off Request** screen. However, if you select a bill (with debit balance) which contains one or more credit line items or if you select a bill (with credit balance) which contains one or more debit line items, the system will not allow you to add the debit line items in the write off request by directly adding the bill. In such case, you need to individually select the debit bill segments and bill adjustments, and add them in the **Write Off Details** zone in the **Main** tab of the **Refund Request** screen.

If a write off request is currently in progress for a debit bill segment or bill adjustment, then bills of the respective account are not listed in the **Search Bills** zone. In addition, a bill with all the credit line items is also not listed in the **Search Bills** zone.

Bill Line Items

The **Bill Line Items** zone lists the debit and credit bill segments, and the adjustments of the bill. This zone contains the following columns:

Column Name	Column Description
Entity ID	Displays the bill segment or adjustment ID.
Entity Type	Indicates whether the entity is either a bill segment or an adjustment.
Entity Information	Displays additional information about the bill segment or adjustment. In addition, a context menu ( ) icon appears corresponding to this field which helps in navigating to other screens in the application.
	Note: The content menu appears only when the entity is a bill segment. It has a link. If the entity is a bill segment, the **Bill Segment** screen appears where you can view the details of the respective bill segment. However, if the entity is an adjustment, the **Adjustment** screen appears where you can view the details of the respective adjustment.
Entity Amount	Displays the bill segment or adjustment amount.
Eligible Amount	Displays the bill segment or adjustment amount which is eligible for write off. The system calculates the eligible amount using the following formula: `Eligible Amount = Entity Amount-Amount Written Off`
	Note: If the bill segment or adjustment has credit balance, the eligible amount for write off would be zero.
Amount Written Off	Displays the amount which is already written off to the account.

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Column Name	Column Description
Contract Information	Displays additional information about the contract against which the bill segment or adjustment is created. In addition, a context menu (⊙) icon appears corresponding to this field which helps in navigating to other screens in the application.
	Note: It has a link. On clicking the link, the **Contract** screen appears where you can view the details of the respective contract.

Note:

Pagination is used to display limited number of records in the **Search Results** section. You can use the navigation links, such as **Previous** and **Next** to navigate between pages. Note that the navigation links appear in the **Search Results** section only when the records in the search results exceed 20.

A check-box appears corresponding to each bill line item. To add a bill line item to the write off request, click the check box corresponding to the bill line item and click the **Add** button. You can also select multiple bill line items at the same time. In addition, you can select the check box corresponding to the column header. This allows you to select all the bill line items listed in the respective zone. For more information, see Adding a Debit Bill Line Item to the Write Off Request on page 1830

By default, the **Bill Line Items** zone does not appear in the **Bills** tab. It appears only when you click the **Broadcast** (⊙) icon corresponding to the bill in the **Search Bills** zone.

You can filter the list using the **Bill Segment Date From** and **To** field available in the **Filter** area. By default, the **Filter** area is hidden. You can view the **Filter** area by clicking the **Filters** (▽) icon in the upper right corner of this zone.

Write Off Request - Log

The **Log** tab contains the following zone:

- Write Off Request Log on page 1826

Write Off Request Log

The **Write Off Request Log** zone lists the complete trail of actions performed on the write off request. This zone contains the following columns:

Column Name	Column Description
Creation Date/Time	Displays the date and time when the action was performed on the write off request.
Details	Displays the details about the action performed on the write off request.
User	Indicates the user who has performed the action on the write off request.
Log Type	Indicates the type of log.
Related Object	Indicates the object or entity which is generated when the action is performed on the write off request.
Status Reason	Displays the status reason of action performed on the write off request.

Note: You can manually add a log entry for the write off request by clicking the **Add Log Entry** link in the upper right corner of the **Write Off Request Log** zone.

Related Topics

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For more information on...	See...
How to view the log of a write off request	Viewing the Log of a Write Off Request on page 1842

Defining a Characteristic for a Write Off Request

Prerequisites

To define a characteristic for a write off request, you should have:

- Characteristic types defined in the application (where the characteristic entity is set to **Refund/Write Off Request**)

Procedure

To define a characteristic for a write off request:

1. Search for the write off request in the **Refund/Write Off Request** screen.
2. In the **Search Results** section, click the link in the **Refund/Write Off Request** column *c*orresponding to the write off request whose details you want to edit.
   The **Write Off Request** screen appears.
3. Click the **Edit** button in the **Write Off Request** zone.
   The **Edit Write Off Request** screen appears.

> **Note:** The **Edit** button appears only when the write off request is in the **Draft** status.

4. Ensure that the **Characteristics** section is expanded when you are editing the write off request.

   The **Characteristics** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Effective Date	Used to specify the date from when the characteristic is effective for the write off request.	Yes (Conditional) **Note:** This field is required when you are defining a characteristic for the write off request.
Characteristic Type	Used to indicate the characteristic type. **Note:** The list includes only those characteristic types where the characteristic entity is set to **Refund Write Off Request**.	Yes (Conditional) **Note:** This field is required when you are defining a characteristic for the write off request.
Characteristic Value	Used to specify the value for the characteristic type. **Note:** On specifying the value for a predefined characteristic type, the description of the characteristic value appears corresponding to the **Characteristic Value** field.	Yes (Conditional) **Note:** This field is required when you are defining a characteristic for the write off request.

5. Enter the required details in the **Characteristics** section.

> **Note:** If you select a predefined characteristic type, the **Search** (🔍) icon appears corresponding to the **Characteristic Value** field. On clicking the **Search** icon, you can search for a predefined characteristic value.

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6. If you want to define more than one characteristic for the write off request, click the **Add** (+) icon and then *r*epeat step 5.

> **Note:** However, if you want to remove a characteristic from the write off request, click the **Delete** (🗑) icon corresponding to the characteristic.

Related Topics

For more information on...	See...
How to search for a write off request	Searching for a Refund or Write Off Request on page 1773
How to create a write off request	Creating a Write Off Request on page 1776

Adding a Debit Bill to the Write Off Request

Prerequisites

To add a debit bill to the write off request, you should have:

- Bills that are in the **Complete** status for an account with one or more debit line items.

Procedure

To add a debit bill to the write off request:

1. Search for the write off request in the **Refund/Write Off Request** screen.

> **Note:** The write off request must be in the **Draft** status.

2. In the **Search Results** section, click the link in the **Refund/Write Off Request** column corresponding to the write off request whose details you want to edit.
   The **Write off Request** screen appears.
3. Ensure that the **Bills** tab is selected.

> **Note:** If the bills are already listed in the **Search Results** section, you can directly begin from step 6, else resume from step 4.

4. Click the **Expand Filter** button and enter the search criteria in the **Search Bills** zone.

> **Note:** ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.

5. Click **Search**.
   A list of bills that meet the search criteria appears in the **Search Results** section.
6. Do either of the following:

If...	Then...
A bill has all debit line items and you want to add the debit bill to the write off request	**a.** In the **Search Bills** zone, select the check box corresponding to the bill that you want to add in the write off request.

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If...	Then...
	Note: You can also select multiple bills at the same time. In addition, you can select the check box corresponding to the column header. This allows you to add all the bills listed in the **Search Results** section. **b.** Click the **Add** button in the **Search Bills** zone. **Note:** The default adjustment type selected in the write off request type should be an adjustment type where the A/P request type code is not defined.
A bill has debit balance and one or more credit line items, and you want to add the debit bill to the write off request	**a.** In the **Search Bills** zone, select the bills that you want to write off. **Note:** You can also select multiple bills at the same time. In addition, you can select the check box corresponding to the column header. This allows you to add all the bills listed in the **Search Results** section. **b.** Click the **Add** button in the **Search Bills** zone. **Note:** The default adjustment type selected in the write off request type should be an adjustment type where the A/P request type code is not defined.

The **Confirm Adjustment Type** window appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Request Information	Displays information about the write off request	Not applicable
Adjustment Type	Used to indicate the adjustment type using which the write off adjustment should be created. **Note:** The **Search** (🔍) icon appears corresponding to this field. On clicking the **Search** icon the **Adjustment Type Search** window appears. On specifying the adjustment type, the description of the adjustment type appears corresponding to the **Adjustment Type Search** field.	No

7. Modify the adjustment type, if required.
8. Click **OK**.
   A message appears indicating that the selected bills are added to the write off request.

Note:

If you select the bill (with credit balance) which contains one or more debit line items or if you select the bill (with debit balance) which contains one or more credit line items, the system will not allow you to add the debit line items by directly adding the bill. In such case, you need to individually select the debit bill segments and bill adjustments, and then add them to the write off request.

The system allows you to add the debit bill segments or bill adjustments in the **Write Off Details** zone, irrespective of whether you select the debit bill, or debit bill segments, or bill adjustments.

To view the line items of a bill, click the **Broadcast** (📡) icon corresponding to the respective bill in the **Search Results** section.

The system will not allow you to add the credit line item to the **Write Off Details** zone.

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Related Topics

For more information on...	See...
How to create a write off request	Creating a Write Off Request on page 1776

Adding a Debit Bill Line Item to the Write Off Request

You can write off the debit bill line items, such as bill segments and adjustments of the account. While adding a debit bill line item to the write off request, you can either:

- Directly add all debit line items of a bill to the write off request by adding the bill which has all bill segments and adjustments in debit.
- Individually add the debit bill segment or adjustment of the bill (with one or more debit line items) to the write off request.

Prerequisites

To add a debit bill line item to the write off request, you should have:

- Bills that are in the **Complete** status for an account with one or more debit line items

Procedure

To add a debit bill line item to the write off request:

1. Search for the write off request in the **Refund/Write Off Request** screen.

   Note: The write off request must be in the **Draft** status.

2. In the **Search Results** section, click the link in the **Refund/Write Off Request** column *c*orresponding to the write off request whose details you want to edit.
   The **Write off Request** screen appears.
3. Ensure that the **Bills** tab is selected.

   Note: If the bills are already listed in the **Search Results** section, you can directly begin from step 6, else resume from step 4.

4. Click the **Expand Filter** button and enter the search criteria in the **Search Bills** zone.

   Note: ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.

5. Click **Search**.
   A list of bills that meet the search criteria appears in the **Search Results** section.
6. Do any of the following:

If...	Then...
A bill has all debit line items and you want to add a particular debit bill line item to the write off request	**a.** In the **Search Results** section, click the **Broadcast** (ᯤ) icon corresponding to the bill whose bill line items you want to view. The **Bill Line Items** zone appears. **b.** Select the check box corresponding to the debit bill segment or bill adjustment that you want to write off.

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If...	Then...
	Note: You can also select multiple credit bill segments or bill adjustments at the same time. In addition, you can select the check box corresponding to the column header. This allows you to add all the debit bill segments or bill adjustments listed in the **Search Results** section to the write off request. **c.** Click the **Add** button in the **Search Bills** zone.
A bill has debit balance and one or more credit line items	**a.** In the **Search Results** section, click the **Broadcast** (ᯤ) icon corresponding to the bill whose bill line items you want to view. The **Bill Line Items** zone appears. **b.** Select the check box corresponding to the debit bill segment or bill adjustment that you want to write off. **Note:** You can also select multiple credit bill segments or bill adjustments at the same time. In addition, you can select the check box corresponding to the column header. This allows you to add all the debit bill segments or bill adjustments listed in the **Search Results** section to the write off request. **c.** Click the **Add** button in the **Search Bills** zone.
A bill has credit balance and one or more debit line items	**a.** In the **Search Results** section, click the **Broadcast** (ᯤ) icon corresponding to the bill whose bill line items you want to view. The **Bill Line Items** zone appears. **b.** Select the check box corresponding to the debit bill segment or bill adjustment that you want to write off. **Note:** You can also select multiple credit bill segments or bill adjustments at the same time. In addition, you can select the check box corresponding to the column header. This allows you to add all the debit bill segments or bill adjustments listed in the **Search Results** section to the write off request. **c.** Click the **Add** button in the **Search Bills** zone.

The **Confirm Adjustment Type** window appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Request Information	Displays information about the write off request.	Not applicable
Adjustment Type	Used to indicate the adjustment type using which the write off adjustment should be created. **Note:** The **Search** (🔍) icon appears corresponding to this field. On clicking the **Search** icon the **Adjustment Type Search** window appears. On specifying the adjustment type, the description of the adjustment type appears corresponding to the **Adjustment Type Search** field.	No

7. Modify the adjustment type, if required.
8. Click **OK**.
   A message appears indicating that the selected bill segments or bill adjustments are added to the write off request.

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Note:

The debit bill segments or bill adjustments are added in the **Write Off Details** zone in the **Main** tab of the **Write Off Request** screen.

If a write off request is currently in progress for a debit bill segment or bill adjustment, then bills of the respective account are not listed in the **Search Bills** zone. In addition, a bill with all the credit line items is also not listed in the **Search Bills** zone.

If you select a bill (with credit balance) which contains one or more debit line items or if you select a bill (with debit balance) which contains one or more credit line items, the system will not allow you to add the debit line items by directly adding the bill. In such case, you need to individually select the debit bill segments and bill adjustments, and then add them to the write off request.

The system allows you to add the debit bill segments or bill adjustments in the **Write Off Details** zone, irrespective of whether you select the debit bill, or debit bill segments, or bill adjustments.

The system will not allow you to add a credit line item to the **Write Off Details** zone.

Related Topics

For more information on...	See...
How to create a write off request	Creating a Write Off Request on page 1776

Editing a Write Off Request

Prerequisites

To edit a write off request, you should have:

- Adjustment types defined in the application where the **A/P Request Type Code** flag is not set to **Refund**.

Procedure

To edit a write off request:

1. Search for the write off request in the **Refund/Write Off Request** screen.
2. In the **Search Results** section, click the link in the **Refund/Write Off Request Information** column corresponding to the write off request whose details you want to edit.
   The **Write Off Request** screen appears.
3. Click the **Edit** button in the **Write Off Request** zone.

   The **Edit Write Off Request** screen appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Write Off Request Information	Displays information about the write off request.	Not applicable
Adjustment Level	Used to indicate the adjustment level for which you want to create the write off request. The valid values are: • Account • Bill • Segment	No

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Field Name	Field Description	Mandatory (Yes or No)
Account Information	Indicates the account for which the write off request is created. **Note:** The details of the account appear corresponding to the **Account Information** field. It is a read-only field.	Not applicable
Comments	Used to specify additional information about the write off request.	No

4. Modify the details of the write off request, if required.
5. Define, edit, or remove characteristics of the write off request, if required.
6. Click **Save**.
   The changes made to the write off request are saved.

Related Topics

For more information on...	See...
How to search for a write off request	Searching for a Refund or Write Off Request on page 1773
Write Off Request screen	Write Off Request (Used for Viewing) on page 1818
Write Off Request zone	Write Off Request on page 1818
How to define a characteristic for a write off request	Defining a Characteristic for a Write Off Request on page 1827

Editing the Write Off Details

Prerequisites

To edit the write off details, you should have:

- Adjustment types without A/P request type code defined in the application.

Procedure

To edit the write off details:

1. Search for the write off request in the **Refund/Write Off Request** screen.
2. In the **Search Results** section, click the link in the **Refund/Write Off Request** column *c*orresponding to the write off request whose write off or bill line item details you want to edit.
   The **Write Off Request** screen appears. You can edit the bill line items of the write off request by using either of the following ways:

If...	Then...
You select the check box corresponding to the respective bill whose details *y*ou want to edit and click the **Edit** button available in the upper left corner of the **Write Off Details** zone.	The **Edit Request Details** screen appears.

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If...	Then...
You click the **Broadcast** (📡) icon corresponding to the respective bill in the **Write Off Details** zone.	The **Bill Line Items** zone appears. **a.** Select the check box corresponding to the respective bill line item whose details you want to edit and click the **Edit** button available in the upper left corner of the **Bill Line Items** zone. The **Edit Request Details** screen appears.
	Note: This zone appears when the entity type is set to **Bill**. You can edit a bill line item from the write off request only when the write off request is in the **Draft** status.

Note: The **Edit Request Details** screen is a common screen used when you are editing the write off or bill line item details of a write off request.

The **Edit Request Details** screen appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Request ID	Displays the write off request ID.	Not applicable
Account Information	Displays additional information about the account.	Not applicable
Adjustment Type	Indicates the adjustment type of the write off request type. You can search for an adjustment type by clicking the **Search** (🔍) icon corresponding to the field.	No

Button Name	Button Description
Override	Used to override an adjustment type of the write off request.

In addition to these fields, this screen contains following columns:

Column Name	Column Description
Entity Type	Indicates the entity type. The valid values are • Adjustments • Bill • Bill Segment • Payment Event • Payment
Entity ID	Displays the entity ID.
Entity Amount	Displays the entity amount.
Currency	Displays the currency in which the entity was created.
Request Amount	Displays the bill segment or adjustment amount which is eligible for write off. The system calculates the request amount using the following formula: `Request Amount = Entity Amount-Write Off Amount`

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Column Name	Column Description
	Note: If the bill segment or adjustment has credit balance, the eligible amount for write off would be zero.
Adjustment Type	Indicates the adjustment type using which the write off adjustment must be created.
	Note: By default, this field displays the adjustment type which is already associated with the respective write off request. You can search for an adjustment type by clicking the **Search**(🔍) icon corresponding to this field. On clicking the **Search** icon the **Adjustment Type Search** window appears. On specifying the adjustment type, the description of the adjustment type appears corresponding to the **Adjustment Type Search** field.
Bill ID	Displays the bill ID.

In addition to the above columns, the screen has following button:

Button Name	Button Description
Override	Used to override an adjustment type of the write off request.

Note:

Pagination is used to display limited number of records in the **Search Results** section. By default, 10 records are displayed in the **Search Results** section. You can change the number of records displayed per page, if required. You can use the navigation buttons, such as **First** (<<), **Previous** (<), **Next** (>), and **Last** (>>) to navigate between pages. You can also select the page to which you want to navigate from the **Go To** list.

The values appear in the **Page Limit** list when you define values for the **PAGE_NUMBER** lookup field.

3. Modify the details of the write off or bill line items.
4. Click **Save**.
   The changes made to the write off or bill line items are saved.

Related Topics

For more information on...	See...
Write Off Request screen	Write Off Request (Used for Viewing) on page 1818
Write Off Request zone	Write Off Request on page 1818
How to search for a write off request	Searching for a Refund or Write Off Request on page 1773

Deleting a Write Off Request

Procedure

To delete a write off request:

1. Search for the write off request in the **Refund/Write Off Request** screen.

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2. In the **Search Results** section, click the link in the **Refund/Write Off Request** column *c*orresponding to the write off request that you want to delete.
   The **Write Off Request** screen appears.
3. Click the **Delete** button in the **Write Off Request** zone.
   A message appears confirming whether you want to delete the write off request.

> **Note:** The **Delete** button appears when the write off request is in the **Draft** status.

4. Click **OK**.
   The write off request is deleted.

Related Topics

For more information on...	See...
How to search for a write off request	Searching for a Refund or Write Off Request on page 1773
Write Off Request screen	Write Off Request (Used for Viewing) on page 1818
Write Off Request zone	Write Off Request on page 1818

Deleting a Bill from the Write Off Request

Procedure

To delete a bill from the write off request:

1. Search for the write off request in the **Refund/Write Off Request** screen.
2. In the **Search Results** section, click the link in the **Refund/Write Off Request** column *c*orresponding to the write off request whose bill you want to delete.
   The **Write Off Request** screen appears.
3. In the **Write Off Details** zone, select the records where the entity type is **Bill** and click the **Delete** button available in the *u*pper left corner of the **Write Off Details** zone.
   A message appears confirming whether you want to delete the bill from the write off request.

> **Note:** You can delete bill from the write off request when the request is in the **Draft** status.

4. Click **OK**.
   The selected bill gets deleted from the write off request.

Related Topics

For more information on...	See...
Write Off Request screen	Write Off Request (Used for Viewing) on page 1818
Write Off Request zone	Write Off Request on page 1818
How to search for a write off request	Searching for a Refund or Write Off Request on page 1773

Deleting a Bill Line Item from the Write Off Request

Procedure

To delete a bill line item from the write off request:

1. Search for the write off request in the **Refund/Write Off Request** screen.

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2. In the **Search Results** section, click the link in the **Refund/Write Off Request** column *c*orresponding to the write off request whose bill line items you want to delete.
   The **Write Off Request** screen appears.
3. In the **Write Off Details** zone, click the **Broadcast** (ᯤ) icon corresponding to the bill whose line items details *y*ou want to delete.
   The **Bill Line Items** zone appears.
4. In the **Bill Line Items** zone, select the bill line items which you want to delete and click the **Delete** button *a*vailable in the upper left corner of the **Bill Line Items** zone.
   A message appears confirming whether you want to delete the bill line items from the write off request.

Note: You can delete the bill line items from the write off request when the write off request is in the **Draft** status.

5. Click **OK**.
   The selected bill line items are deleted from the write off request.

Related Topics

For more information on...	See...
Write Off Request screen	Write Off Request (Used for Viewing) on page 1818
Write Off Request zone	Write Off Request on page 1818
How to search for a write off request	Searching for a Refund or Write Off Request on page 1773

Submitting a Write Off Request

Prerequisites

To submit a write off request, you should have:

- Debit bill line items added in the write off request.

Procedure

To submit a write off request:

1. Search for the write off request in the **Refund/Write Off Request** screen.
2. In the **Search Results** section, click the link in the **Refund/Write Off Request** column *c*orresponding to the write off request that you want to submit.
   The **Write Off Request** screen appears.
3. Click the **Submit** button in the **Write Off Request** zone.

   The system behaves in the following manner:

If...	Then
The **Approval Required** and **Hierarchical Approval** check boxes are selected in the write off request type using which the write off request is created	A To Do of the **C1-WOREQ** To Do type is created and sent to the approver at the first level in the approval hierarchy, and the status of the write off request is changed to **Approval In Progress**.
The **Approval Required** check box is selected, but the **Hierarchical Approval** check box is not selected in the write off	A To Do of the **C1-WOREQ** To Do type is created and sent to the approver at the hierarchy level where the total write off amount falls within the threshold limit. In addition, the status of the write off request is changed to **Approval In Progress**.

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If...	Then
request type using which the write off request is created	
The **Approval Required** check box is not selected in the write off request type using which the write off request is created	The write off adjustments are created using the specified adjustment types and the status of the write off request is changed to **Processed**.
	Note: The write off adjustments are created in the **Frozen** status. If a match event is present for the debit bill line items (such as bill segments and adjustments), the existing match event is stamped on the write off adjustments and on the corresponding financial transactions. However, if the match events does not exist, a new match event is created and stamped on the write off adjustments and on the corresponding financial transactions. If you are doing a partial write off for any entity, the corresponding match event status is set to **Open**. However, if the entire eligible amount is written off, the corresponding match event status is set to **Balanced**.
The total write off amount is less than the minimum threshold amount	The write off request is automatically approved by the system and write off adjustments are created using the specified adjustment types. In addition, the status of the write off request is changed to **Processed**.
	Note: The write off adjustments are created in the **Frozen** status. If a match event is present for the debit bill line items (such as bill segments and adjustments), the existing match event is stamped on the write off adjustments and on the corresponding financial transactions. However, if the match events does not exist, a new match event is created and stamped on the write off adjustments and on the corresponding financial transactions. If you are doing a partial write off for any entity, the corresponding match event status is set to **Open**. However, if the entire eligible amount is written off, the corresponding match event status is set to **Balanced**.

Note: The **Submit** button appears when the write off request is in the **Draft** status.

Related Topics

For more information on...	See...
How to search for a write off request	Searching for a Refund or Write Off Request on page 1773
Write Off Request screen	Write Off Request (Used for Viewing) on page 1818
Write Off Request zone	Write Off Request on page 1818

Approving a Write Off Request

You can view the number of write off requests which are pending for approval in the **Refund/Write Off Request** screen. The approver can review, and accordingly approve or reject the write off request based on the observations.

Note: The system will not allow you to approve or reject a write off request submitted by you.

Procedure

To approve a write off request:

1. Do either of the following:

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If you want to...	Then...
Approve a write off request through the Refund/Write Off Request screen	**a.** Search for the write off request in the **Refund/Write Off Request** screen. **b.** In the **Search Results** section, click the link in the **Refund/Write Off Request** column corresponding to the write off request which you want to review.
Approve a write off request from the To Do List screen	**a.** Click the **Menu** link in the **Application** toolbar. A list appears. **b.** From the **Main** menu, select **To Do** and then click **To Do List**. The **To Do List** screen appears. **c.** Enter the **C1-WOREQ** To Do Type in the **To Do Type** field. **d.** Click the **Search** (🔍) icon corresponding to the **To Do Type** field. The **To Do Type for User Search** window appears. **e.** In the **To Do Type for User Search** window, enter the **C1-WOREQ** To Do Type in the **To Do Type** field and click the **Search** button. The **To Do List** screen appears. **f.** Select the **Open** option from the **Filter by** list to view all the unassigned To Dos. **g.** Click the link in the **Message** column corresponding to the To Do of the write off request that you want to review.

The **Write Off Request** screen appears.

2. Review the details in the **Write Off Request** screen.
3. Click the **Approve** button in the **Write Off Request** zone.

The system behaves in the following manner:

If...	Then...
The **Hierarchical Approval** check box is selected in the write off request type using which the write off request is created and the total write off amount is greater than the threshold amount specified at the next level in the approval hierarchy	A To Do of the **C1-WOREQ** To Do type is created and sent to the approver at the next level in the approval hierarchy, and the status of the write off request remains as **Approval In Progress**.
The **Hierarchical Approval** check box is selected in the write off request type using which the write off request is created and the total write off amount is less than the threshold amount specified at the next level in the approval hierarchy	The write off adjustments are created using the specified adjustment types and the status of the write off request is changed to **Processed**. **Note:** The write off adjustments are created in the **Frozen** status. If a match event is present for the debit bill line items (such as bill segments and adjustments), the existing match event is stamped on the write off adjustments and on the corresponding financial transactions. However, if the match events does not exist, a new match event is created and stamped on the write off adjustments and on the corresponding financial transactions. If you are doing a partial write off for any entity, the corresponding match event status is set to **Open**. However, if the entire eligible amount is written off, the corresponding match event status is set to **Balanced**.

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If...	Then...
The **Hierarchical Approval** check box is not selected in the write off request type using which the write off request is created	The write off adjustments are created using the specified adjustment types and the status of the write off request is changed to **Processed**.
	Note: The write off adjustments are created in the **Frozen** status. If a match event is present for the debit bill line items (such as bill segments and adjustments), the existing match event is stamped on the write off adjustments and on the corresponding financial transactions. However, if the match events does not exist, a new match event is created and stamped on the write off adjustments and on the corresponding financial transactions. If you are doing a partial write off for any entity, the corresponding match event status is set to **Open**. However, if the entire eligible amount is written off, the corresponding match event status is set to **Balanced**.

Note: The **Approve** button appears when:

- The write off request is in the **Approval In Progress** status.
- A user with the approval To Do role is reviewing the write off request.

Related Topics

For more information on...	See...
How to search for a write off request	Searching for a Refund or Write Off Request on page 1773
Write Off Request screen	Write Off Request (Used for Viewing) on page 1818
Write Off Request zone	Write Off Request on page 1818

Rejecting a Write Off Request

Prerequisites

To reject a write off request, you should have:

- Rejection reasons defined in the application.

Note:

While rejecting a write off request, you need to specify the reason why you want to reject the write off request. You can select the appropriate rejection reason when you have defined the reasons for the **Rejected** status of the **C1-WORequest** business object in the **Status Reason** screen.

The system will not allow you to approve or reject a write off request submitted by you.

Procedure

To reject a write off request:

1. Do either of the following:

If you want to...	Then...
Reject a write off request through the Refund/Write Off Request screen	**a.** Search for the write off request in the **Refund/Write Off Request** screen. **b.** In the **Search Results** section, click the link in the **Refund/Write Off Request** column corresponding to the write off request which you want to review.

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If you want to...	Then...
Reject a write off request from the To Do List screen	**a.** Click the **Menu** link in the **Application** toolbar. A list appears. **b.** From the **Main** menu, select **To Do** and then click **To Do List**. The **To Do List** screen appears. **c.** Enter the **C1-WOREQ** To Do Type in the **To Do Type** field. **d.** Click the **Search** (🔍) icon corresponding to the **To Do Type** field. The **To Do Type for User Search** window appears. **e.** In the **To Do Type for User Search** window, enter the **C1-WOREQ** To Do Type in the **To Do Type** field and click the **Search** button. The **To Do List** screen appears. **f.** Select the **Open** option from the **Filter by** list to view all the unassigned To Dos. **g.** Click the link in the **Message** column corresponding to the To Do of the write off request that you want to review.

The **Write Off Request** screen appears.

2. Review the details in the **Write Off Request** screen.
3. Click the **Reject** button in the **Write Off Request** zone.

   The **Reject Write Off Request** window appears. It contains following fields:

Field Name	Field Description	Mandatory (Yes or No)
Status Reason	Used to indicate the reason why you want to reject the write off request.	Yes
Comments	Used to specify additional information while rejecting the write off request.	No

Note: The **Reject** button appears when:

- The write off request is in the **Approval In Progress** status.
- A user with the approval To Do role is reviewing the write off request.

4. Select the rejection reason from the **Status Reason** list.
5. Click **Save**.
   The status of the write off request is changed to **Rejected**.

Related Topics

For more information on...	See...
How to search for a write off request	Searching for a Refund or Write Off Request on page 1773
Write Off Request screen	Write Off Request (Used for Viewing) on page 1818
Write Off Request zone	Write Off Request on page 1818

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Viewing the Log of a Write Off Request

Procedure

To view the log of a write off request:

1. Search for the write off request in the **Refund/Write Off Request** screen.
2. In the **Search Results** section, click the link in the **Refund/Write Off Request** column *c*orresponding to the write off request whose log you want to view.
   The **Write Off Request** screen appears.
3. Click the **Log** tab
4. View the log of the write off request in the **Write Off Request Log** zone.

> **Note:** You can manually add a log entry for the write off request by clicking the **Add Log Entry** link in the upper right corner of the **Write Off Request Log** zone.

Related Topics

For more information on...	See...
How to search for a write off request	Searching for a Refund or Write Off Request on page 1773
How to add a log entry for a write off request	Adding a Log Entry for a Write Off Request on page 1842
Write Off Request Log zone	Write Off Request Log on page 1826
Log tab	Write Off Request - Log on page 1826

Adding a Log Entry for a Write Off Request

Procedure

To add a log entry for a write off request:

1. Search for the write off request in the **Refund/Write Off Request** screen.
2. In the **Search Results** section, click the link in the **Refund/Write Off Request** column *c*orresponding to the write off request whose log you want to edit.
   The **Write Off Request** screen appears.
3. Click the **Log** tab.
   The **Log** tab appears.
4. Click the **Add Log Entry** link in the upper right corner of the **Write Off Request Log** zone.

   The **Add Request Log** window appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Request Information	Displays information about the write off request.	Not applicable
Log Details	Used to specify additional comments for the write off request.	Yes

5. Enter the comments in the **Log Details** field.
6. Click **Save**.
   The log entry is added in the **Write Off Request Log** zone.

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Related Topics

For more information on...	See...
How to search for a write off request	Searching for a Refund or Write Off Request on page 1773
Write Off Request screen	Write Off Request (Used for Viewing) on page 1818
Log tab	Write Off Request - Log on page 1826

Cancelling a Write Off Request

There might be situations when incorrect write off request is processed in the system. In such case, the system provides you with an ability to cancel the write off request. However, note that you can cancel a write off request when the write off request is in the **Processed** status.

Prerequisites

To cancel a write off request, you should have:

- Cancel reasons defined in the application.

Note: While cancelling a write off request, you need to specify the reason why you want to cancel the write off request. You can select the appropriate cancel reason when you have defined the reasons for the **Cancelled** status of the **C1-WORequest** business object in the **Status Reason** screen.

Procedure

To cancel a write off request:

1. Search for the write off request in the **Refund/Write Off Request** screen.
2. In the **Search Results** section, click the link in the **Refund/Write Off Request** column *c*orresponding to the write off request that you want to cancel.
   The **Write Off Request** screen appears.
3. Click the **Cancel** button in the **Write Off Request** zone.

   The **Cancel Reason** window appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Status Reason	Used to indicate the reason why you want to cancel the write off request.	Yes
Comments	Used to specify additional information while cancelling the write off request.	No

   Note: The **Cancel** button appears when the write off request is in the **Processed** status.
4. Select the cancel reason from the **Status Reason** list.
5. Click **Save**.
   The status of the write off request is changed to **Cancelled**.

Note: The **C1-WOCANCEL** algorithm cancels all the frozen adjustments created for the write off request which is in the **Processed** state.

Related Topics

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For more information on...	See...
How to search for a write off request	Searching for a Refund or Write Off Request on page 1773
Write Off Request screen	Write Off Request (Used for Viewing) on page 1818
Write Off Request zone	Write Off Request on page 1818

Chapter 27

Hold Request

Topics:

- Prerequisites
- Hold Request Lifecycle
- Hold Entities
- Hold Processes
- Hold Mass Accounts Using Selection Criteria
- Hold Mass Persons Using Selection Criteria
- Hold Request (Without Approval) Status Transition
- Hold Request (With Approval) Status Transition
- Setting the C1-HOLDSRCH Feature Configuration
- Setting the SYSDT Feature Configuration
- Algorithms Used in C1-HoldRequest
- Hold Request Type
- Hold Request (Used for Searching)
- Hold Request (Used for Viewing)

Hold is a way to prevent certain types of activities from taking place for a customer over a given period of time. A hold may be enforced due to various reasons, including natural calamities, disaster recovery, disputes, suspicious activity, pending investigations, uncleared checks, legal restrictions, and so on.

Oracle Revenue Management and Billing enables you to hold certain processes at the person, account, or bill level through a hold request. You need to specify a period (i.e., duration) for which the hold request is initiated. Depending on the entity level, you need to add the entities, such as persons, accounts, or bills in the hold request. You need to define a period for which you want to keep the entities on hold. The hold entity period should be within the hold request period. Similarly, depending on the entity level, you need to add the processes, such as bill generation, overdue, auto pay, funding, delinquency, or refund, respectively, that you want to keep on hold for the entity through the hold request. The system will hold the process for the entity when the entity date range falls within the respective process date range. You can create multiple hold requests for the same entity with different hold reasons.

Prerequisites

To setup the hold request feature, you need to do the following:

- Define the required hold request types in the system
- Assign the **C1-HLDAP** To Do type to a To Do role whose users must receive a To Do while submitting a hold activation or release request for approval
- Assign the **C1-HOLSB** To Do type to a To Do role whose users must receive a To Do while requesting to resubmit a hold activation or release request for approval
- Define the required characteristic types where the characteristic entity is set to **Hold Request**
- Define the required characteristic types where the characteristic entity is set to **Hold Request Type**
- Set the **Environment Type** option type of the **SYSDT** feature configuration
- Set the **C1-HOLDSRCH** feature configuration
- Attach the **CI_COPAICP** algorithm to the **Cancel Logic** system event of the respective overdue process templates
- Attach the **CI_OE-NO-DEP** algorithm to the **Cancel Logic** system event of the respective overdue event type
- Define the values for the **HOLD_PROCESS_FLG** and **HOLD_REASON_FLG** lookup fields.
- Define the status reasons for the **Discarded**, **Rejected**, and **Released** statuses of the **C1-HoldRequest** business object in the **Status Reason** screen.
- Set the batch control type of the **Hold Request Periodic Monitor (C1-HLDRQ)**, **Hold Request Monitor (C1-HLMON)**, **Delete Pending Bills and its Bill Segments (C1-DELBI)**, and **Hold Request Entity Derivation Monitor (C1-HLDET)** batches to **Timed** and define the following attributes:
  - Time Interval
  - Timer Active
  - User ID
  - Batch Language
  - Email Address

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

Related Topics

For more information on...	See...
How to setup the **SYSDT** feature configuration	Setting the SYSDT Feature Configuration on page 1890
How to setup the **C1-HOLDSRCH** feature configuration	Setting the C1-HOLDSRCH Feature Configuration on page 1888

Hold Request Lifecycle

While creating a hold request, you need to specify the hold request type using which you want to create the hold request. It is the hold request type which helps the system to determine the following:

- The hold request business object using which a hold request should be created through the hold request type.
- The processes which can be kept on hold for different entities through the respective hold requests.
- Whether approval process is required while activating and/or releasing the respective hold requests.
- Whether partial hold is allowed when a bill is kept on hold through the respective hold requests.

Note: You cannot create a past dated hold request, but you can surely create a future dated hold request.

Once a hold request is created, you can add more processes and entities before activating the hold request. You can then click the **Submit** button to activate the hold request. On activating a hold request, the system checks whether the number

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of entities added in the hold request exceeds the defer processing count. If the number of entities added in the hold request does not exceed the defer processing count, the status of the hold request is changed to **Active** and the respective processes are kept on hold for the selected entities. However, if the number of entities added in the hold request exceeds the defer processing count, the system changes the status of the hold request to **Deferred Processing**. On executing the **C1-HLDRQ** batch, the status of the hold request is changed to **Active**.

You can optionally configure the approval process, if required, while activating the hold request. If the activation approval process is configured in the respective hold request type, the status of the hold request is changed to **Activation Approval In Progress**. The approver can review, and accordingly approve or reject the hold activation request based on the observations. In addition, the approver can request the submitter to resubmit the hold activation request for approval after making the necessary changes to it. On approving the hold activation request, the status of the hold request is changed to **Active** and the respective processes are kept on hold for the selected entities.

Note that all the selected processes of the entities may not be kept on hold on activating a hold request. Only when the entity date falls within the process date range and the process start date is earlier than the system date or batch business date, the system keeps the process of the respective entity on hold. You need to then execute the **C1-HLMON** batch at regular intervals. It will hold a process of an entity when the following conditions are met:

- Entity date falls within the process date range
- Process start date is earlier than the batch business date

The system enables you to manually release a hold request from the user interface. On manually releasing a hold request from the user interface, the system sets the hold request, hold entities, and hold processes end dates to the system date. In addition, the status of the hold request is changed to **Released** and the respective processes kept on hold are released for the selected entities. You can optionally configure the approval process, if required, while releasing the hold request. If the release approval process is configured in the respective hold request type, the status of the hold request is changed to **Release Approval in Progress**. The approver can review, and accordingly approve the hold release request based on the observations. In addition, the approver can request the submitter to resubmit the hold release request for approval after making the necessary changes to it. On approving the hold release request, the status of the hold request is changed to **Released** and the respective processes kept on hold are released for the selected entities.

The system also automatically releases a hold request. On executing the **C1-HLMON** batch, it checks whether any active hold request's end date is earlier than the batch business date. If so, the status of the hold request is changed to **Released** and the respective processes kept on hold are released for the selected entities. In addition, the release status reason is stamped corresponding to the hold request. The hold request, hold entity, and the hold process end dates are updated to the batch business date. Note that the entity and process end dates are updated only when their start date is not a future date.

A hold request goes through various statuses in its lifecycle. Note that lifecycle of a hold request is driven by the business object using which the hold request is created. A hold request business object named **C1-HoldRequest** is shipped with the product. The hold request feature explained in this document is articulated based on the lifecycle and logic defined in the **C1-HoldRequest** business object.

For more information on how to setup the hold request feature, see Prerequisites on page 1846.

Related Topics

For more information on...	See...
How to search for a hold request	Searching for a Hold Request on page 1924
How to create a hold request	Creating a Hold Request on page 1925
How to view the details of a hold request	Viewing the Hold Request Details on page 1946
How to add an entity in a hold request	Adding an Entity in a Hold Request on page 1930
How to define an account selection criteria	Defining an Account Selection Criteria for a Hold Request on page 1932

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For more information on...	See...
How to define a person selection criteria	Defining a Person Selection Criteria for a Hold Request on page 1942
How to add a process in a hold request	Adding a Process in a Hold Request on page 1944
How to define a characteristic for a hold request	Defining a Characteristic for a Hold Request on page 1945
How to add a person in a hold request	Adding a Person in a Hold Request on page 1967
How to add an account in a hold request	Adding an Account in a Hold Request on page 1967
How to add a bill in a hold request	Adding a Bill in a Hold Request on page 1968
How to edit a hold request	Editing a Hold Request on page 1969
How to edit the entity details of a hold request	Editing the Entity Details of a Hold Request on page 1971
How to update the end date of all the hold entities at once in a hold request	Updating the End Date of All the Hold Entities (Mass Edit) on page 1973
How to delete an entity from a hold request	Deleting an Entity from a Hold Request on page 1975
How to delete a hold request	Deleting a Hold Request on page 1976
How to discard a hold request	Discarding a Hold Request on page 1976
How to submit a hold request	Submitting a Hold Activation Request on page 1977
How to approve a hold activation request	Approving a Hold Activation Request on page 1981
How to reject a hold activation request	Rejecting a Hold Activation Request on page 1985
How to request to resubmit a hold activation request for approval	Requesting to Resubmit a Hold Activation Request for Approval on page 1987
How to release a hold request	Releasing a Hold Request on page 1988
How to approve a hold release request	Approving a Hold Release Request on page 1991
How to request to resubmit a hold release request for approval	Requesting to Resubmit a Hold Release Request for Approval on page 1994
How to view the log of a hold request	Viewing the Log of a Hold Request on page 1995
How to add a log entry for a hold request	Adding a Log Entry for a Hold Request on page 1996

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Hold Entities

Through a hold request, you can keep various entities, such as persons, accounts, or bills on hold. To keep the persons, accounts, or bills on hold, you need to set the entity level in the hold request to **Person**, **Account**, or **Bill**, respectively. The system enables you to keep the following processes on hold for the respective entity through a hold request:

Entity	**Valid Hold Processes**
Person	Bill Generation, Delinquency, and Funding
	Note: If you keep the bill generation process on hold for a person, then the system will hold the bill generation process for all its immediate accounts. If you keep the delinquency process on hold for a person, then the system will hold the delinquency process for the person and its immediate accounts. If you keep the funding process on hold for a person, then the system will hold the funding process for all its bills irrespective of the bill status. In addition, the hold will be on the complete outstanding bill amount and not on the partial bill amount.
Account	Auto Pay, Bill Generation, Delinquency, Funding, Overdue, and Refund
	Note: You cannot select both the **Overdue** and **Delinquency** processes at the same time in the hold request. The **Overdue** process is valid for the financial services and health insurance domains, but the **Delinquency** process is valid only for the health insurance domain. If you keep the funding process on hold for an account, then the system will hold the funding process for all its bills irrespective of the bill status. In addition, the hold will be on the complete outstanding bill amount and not on the partial bill amount. If the auto pay process of an account is on hold, you cannot include any debit bill of the account in any funding request. On activating a hold request for an account, the system creates an alert for the account on the dashboard. On clicking the dashboard alert, the **Alerts** tab of the **Account** screen appears. Note that the start and end dates of the alert is set to the hold request start and end dates, respectively. The alert appears until the hold request for the account is released.
Bill	Funding
	Note: If the entity level is set to **Bill**, you can hold the funding process of only completed bills through the hold request. If you select the **Allow Partial Hold for Bill** option in the respective hold request type, you can hold the funding of partial outstanding amount of the bill through the hold request. If you want to hold the auto pay process for a bill, you need to use the **Stop Autopay** feature.

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While creating a hold request where the entity level is set to **Person**, you can select the **Hierarchy** option corresponding to each person included in the hold request. If the **Hierarchy** option is selected, the system keeps the respective processes on hold for all the accounts in the person's hierarchy. Note that the system considers only the child persons and not the grandchild persons from the person's hierarchy and then derives the accounts where the child person is the main customer. However, if the **Hierarchy** option is not selected, the system keeps the respective processes on hold only for the persons' immediate accounts.

You can create multiple hold requests for the same entity with different hold reasons. If a bill is on hold through multiple hold requests with different hold reasons, then the maximum hold amount across the hold requests will be considered for the bill. Let us understand this with the help of an example.

Hold Request	Bill	Bill Outstanding Amount	Hold Amount
HR1	B1	100$	50$
HR2	B2	100$	60$
HR3	B3	-100$	-30$
HR4	B4	-100$	-50$

In this case, the hold amount for B1 would be 60$ and the hold amount for B2 would be 50$.

Hold Processes

Through a hold request, you can keep the following processes on hold:

- **Auto Pay** – You can hold the auto pay process of an account. The system allows you to select the **Auto Pay** option in a hold request only when the entity level is set to **Account** and not when the entity level is set to **Person** or **Bill**. For more information, see Hold Auto Pay on page 1850.
- **Bill Generation** – You can hold the bill generation process of a person or an account. The system allows you to select the **Bill Generation** option in the hold request only when the entity level is set to **Person** or **Account** and not when the entity level is set to **Bill**. For more information, see Hold Bill Generation on page 1854.
- **Delinquency** – You can hold the delinquency process of a person or an account. The system allows you to select the **Delinquency** option in the hold request only when the entity level is set to **Person** or **Account** and not when the entity level is set to **Bill**. For more information, see Hold Delinquency on page 1858.

  Note: The **Delinquency** process is tested and certified only for the health insurance domain and not for the financial services domain.
- **Funding** – You can hold the funding process of a person, account, or a bill. The system allows you to select the **Funding** option in the hold request when the entity level is set to **Person**, **Account**, or **Bill**. For more information, see Hold Funding on page 1863.
- **Overdue** – You can hold the overdue process of an account. The system allows you to select the **Overdue** option in the hold request only when the entity level is set to **Account** and not when the entity level is set to **Person** or **Bill**. For more information, see Hold Overdue Process on page 1864.
- **Refund** – You can hold the refund process of an account. The system allows you to select the **Refund** option in the hold request only when the entity level is set to **Account** and not when the entity level is set to **Person** or **Bill**. For more information, see Hold Refund on page 1868.

Hold Auto Pay

Oracle Revenue Management and Billing enables you to hold the auto pay process for an account through a hold request. If the auto pay process is kept on hold for an account, the system does not allow you to create automatic payments for the debit bills of the account.

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Note: The system allows you to select the **Auto Pay** option in a hold request only when the entity level is set to **Account** and not when the entity level is set to **Person** or **Bill**.

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

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

You can also create, update, or release a hold request through an inbound web service. For more information, see Hold Request Creation, Modification, Release, and View Through Inbound Web Service on page 3875.

Auto Pay Hold Activation

On activating a hold request for an account, the system sets the defer auto pay date corresponding to the accounts whose date range falls within the auto pay process date range of the hold request. The defer auto pay date is set to the hold entity end date or auto pay process end date whichever is earlier. This means that the system will allow to create automatic payments for the accounts only after the respective defer auto pay date. Note that if the start date of the hold request, hold entity, or hold process is earlier than the system date, the system sets the respective start date to the system date.

Let us understand how the defer auto pay date is derived for an account that is kept on hold through a hold request.

Scenario		**Start Date**	**End Date**	**Defer Auto Pay Date**
Scenario 1	Hold Request 1	01-Jan-2025	31-Jan-2025	-
	Auto Pay Process	01-Jan-2025	31-Jan-2025	
	Account 1	01-Jan-2025	15-Jan-2025	15-Jan-2025
	Account 2	01-Jan-2025	20-Jan-2025	20-Jan-2025
Scenario 2	Hold Request 1	01-Jan-2025	31-Jan-2025	-
	Auto Pay Process	01-Jan-2025	20-Jan-2025	
	Bill Generation Process	01-Jan-2025	25-Jan-2025	
	Account 1	01-Jan-2025	22-Jan-2025	20-Jan-2025
Scenario 3	Hold Request 2	01-Jan-2025	31-Jan-2025	-
	Auto Pay Process	01-Jan-2025	31-Jan-2025	
	Account 3	01-Jan-2025	15-Jan-2025	15-Jan-2025
	Hold Request 3	05-Jan-2025	20-Jan-2025	-
	Auto Pay Process	05-Jan-2025	20-Jan-2025	
	Account 3	05-Jan-2025	20-Jan-2025	20-Jan-2025
	Hold Request 4	10-Jan-2025	25-Jan-2025	-
	Auto Pay Process	10-Jan-2025	25-Jan-2025	
	Account 3	10-Jan-2025	25-Jan-2025	25-Jan-2025
Scenario 4	Hold Request 1	01-Jan-2025	31-Jan-2025	-
	Auto Pay Process	01-Jan-2025	30-Jan-2025	

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Scenario		**Start Date**	**End Date**	**Defer Auto Pay Date**
	Account 1	01-Jan-2025	-	30-Jan-2025
	Account 2	01-Jan-2025	-	30-Jan-2025
Scenario 5	Hold Request 1	01-Jan-2025	31-Jan-2025	-
	Auto Pay Process	01-Jan-2025	-	
	Account 1	01-Jan-2025	-	31-Jan-2025
	Account 2	01-Jan-2025	-	31-Jan-2025
Scenario 6	Hold Request 1	01-Jan-2025	20-Jan-2025	-
	Auto Pay Process	01-Jan-2025	-	-
	Account 1	01-Jan-2025	15-Jan-2025	15-Jan-2025
	Account 2	01-Jan-2025	-	20-Jan-2025

In the scenario 1, the defer auto pay date for the Account 1 is set to 15-Jan-2025 and the defer auto pay date for the Account 2 is set to 20-Jan-2025. This is because the entity end date is earlier than the auto pay process end date. However, in the scenario 2, the defer auto pay date for the Account 1 is set to 20-Jan-2025. This is because the auto pay process end date is earlier than the entity end date.

In the scenario 3, three hold requests are created with different hold reasons to keep the Account 3 on hold for different duration. In this case, the defer auto pay date of the Account 3 is updated every time a new hold request is created for the same account. On 1st Jan, the defer auto pay date of the Account 3 is set to 15-Jan-2025 and then on 5th Jan, the defer auto pay date of the Account 3 is updated to 20-Jan-2025, and finally, on 10th Jan, the defer auto pay date of the Account 3 is updated to 25-Jan-2025

In the scenario 4, the defer auto pay date for the Account 1 and Account 2 is set to 30-Jan-2025. This is because the system sets the defer auto pay date to the auto pay process end date when the entity end date is not specified in the hold request. In the scenario 5, the defer auto pay date for the Account 1 and Account 2 is set to 31-Jan-2025. This is because the system sets the defer auto pay date to hold request end date when both the entity end date and auto pay process end date are not specified in the hold request. In the scenario 6, the defer auto pay date for the Account 1 and Account 2 is set to 15-Jan-2025 and 20-Jan-2025, respectively.

In all the above scenarios, the start date of the hold request, hold process, and hold entity is same. Therefore, the defer auto pay date is derived for the entities either immediately or in the deferred mode (when the **C1-HLDRQ** batch is executed). However, if the start date of the auto pay process or hold entity is later than the hold request start date, the defer auto pay date is derived for the respective entity in the deferred mode (when the **C1-HLMON** batch is executed on or after the auto pay process or hold entity start date). For example,

Scenario		**Start Date**	**End Date**	**Defer Auto Pay Date**
Scenario 1	Hold Request 1	01-Jan-2025	31-Jan-2025	-
	Auto Pay Process	01-Jan-2025	31-Jan-2025	
	Account 1	01-Jan-2025	15-Jan-2025	15-Jan-2025
	Account 2	05-Jan-2025	20-Jan-2025	20-Jan-2025
Scenario 2	Hold Request 1	01-Mar-2025	31-Mar-2025	-
	Auto Pay Process	15-Mar-2025	31-Mar-2025	
	Bill Generation Process	01-Mar-2025	31-Mar-2025	
	Account 1	01-Mar-2025	31-Mar-2025	31-Mar-2025

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In the scenario 1, the defer auto pay date for the Account 1 is derived on 01-Jan-2025 (in the online mode), or on or after 01-Jan-2025 (in the deferred mode). However, the defer auto pay date for the Account 2 is derived on or after 05-Jan-2025 (in the deferred mode). Similarly, in the scenario 2, the defer auto pay date for the Account 1 is derived on or after 15-Mar-2025 (in the deferred mode) and not on 01-Mar-2025.

Note: The defer auto pay date then appears corresponding to the account in the Hold Entities zone of the Hold Request screen. In addition, it appears in the Defer Auto Pay Date field on the Auto Pay tab of the Account screen.

If the number of accounts in the hold request is less than or equal to the defer processing count (specified in the respective hold request type), the system immediately sets the defer auto pay date for the respective accounts. However, if the number of accounts in the hold request is greater than the defer processing count, the system sets the defer auto pay date for the respective accounts in the deferred mode when the **C1-HLDRQ** batch is executed.

Auto Pay Hold Release

On releasing a hold request for an account, the system sets the defer auto pay date to the system date for the respective account. In addition, the automatic payment details of the debit bills (if any) for the respective account are updated in the **CI_BILL_ACH** table. Let us understand how the defer auto pay date is updated for an account when the hold is manually or automatically released.

Scenario		**Start Date**	**End Date**	**Manual Release**	**Automatic Release**	**Release Date**	**Defer Auto Pay Date**
Scenario 1	Hold Request 1	01-Jan-2025	31-Jan-2025	Yes	No	10-Jan-2025 (System Date)	-
	Auto Pay Process	01-Jan-2025	31-Jan-2025				
	Account 1	01-Jan-2025	15-Jan-2025				10-Jan-2025
	Account 2	01-Jan-2025	20-Jan-2025				10-Jan-2025
Scenario 2	Hold Request 1	01-Jan-2025	31-Jan-2025	No	Yes	20-Jan-2025 (Batch Business Date)	-
	Auto Pay Process	01-Jan-2025	20-Jan-2025				
	Bill Generation Process	01-Jan-2025	25-Jan-2025				
	Account 1	01-Jan-2025	22-Jan-2025				20-Jan-2025
Scenario 3	Hold Request 2	01-Jan-2025	31-Jan-2025	Yes	No	10-Jan-2025 (System Date)	-
	Auto Pay Process	01-Jan-2025	31-Jan-2025				
	Account 3	01-Jan-2025	15-Jan-2025				25-Jan-2025
	Hold Request 3	05-Jan-2025	20-Jan-2025	Yes	No	20-Jan-2025 (System Date)	25-Jan-2025
	Auto Pay Process	05-Jan-2025	20-Jan-2025				
	Account 3	05-Jan-2025	20-Jan-2025				25-Jan-2025
	Hold Request 4	10-Jan-2025	25-Jan-2025	Yes	No	21-Jan-2025 (System Date)	-

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Scenario		Start Date	End Date	Manual Release	Automatic Release	Release Date	Defer Auto Pay Date
	Auto Pay Process	10-Jan-2025	25-Jan-2025				
	Account 3	10-Jan-2025	25-Jan-2025				21-Jan-2025

In the scenario 1, the defer auto pay date for the Account 1 and Account 2 is set to the system date when the hold request is manually released on 10-Jan-2025. In the scenario 2, the defer auto pay date for the Account 1 is set to the batch business date (i.e., 20-Jan-2025) when the hold request is automatically released through the **C1-HLMON** batch.

In the scenario 3, the defer auto pay date for the Account 3 is not set to the system date when the hold request 2 and 3 are manually released on 10-Jan-2025 and 20-Jan-2025, respectively. The defer auto pay date for the Account 3 is set to the system date when the hold request 4 is manually released on 21-Jan-2025. This is because no more hold requests exist for the Account 3 in the system.

Note: The defer auto pay date then appears corresponding to the account in the **Hold Entities** zone of the **Hold Request** screen. In addition, it appears in the **Defer Auto Pay Date** field on the **Auto Pay** tab of the **Account** screen.

If the number of accounts in the hold request is less than or equal to the defer processing count (specified in the respective hold request type), the system immediately sets the defer auto pay date to the system date for the respective accounts. However, if the number of accounts in the hold request is greater than the defer processing count, the system sets the defer auto pay date to the system date for the respective accounts in the deferred mode when the **C1-HLMON** batch is executed.

Hold Bill Generation

Oracle Revenue Management and Billing enables you to hold the bill generation process of a person or an account through a hold request. If the bill generation process is kept on hold for an account, the system does not allow you to create any bills for the account from the user interface or through a batch process. If the bill generation process is kept on hold for a person, the system does not allow you to create bills for any of its accounts from the user interface or through a batch process.

Note:

The system allows you to select the **Bill Generation** option in the hold request only when the entity level is set to **Person** or **Account** and not when the entity level is set to **Bill**.

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

- Whether you want to hold the bill generation process for the person or account (the valid values are **Y** or **N**)
- Hold bill generation start date (required if the hold bill generation is set to **Y**)
- Hold bill generation end date

You can also create, update, or release a hold request through an inbound web service. For more information, see Hold Request Creation, Modification, Release, and View Through Inbound Web Service on page 3875.

Bill Generation Hold Activation

On activating a hold request for an account, the system sets the bill after date corresponding to the accounts whose date range falls within the bill generation process date range of the hold request. The bill after date is set to the hold entity end date or bill generation process end date whichever is earlier. This means that the system will allow to create bills for the accounts only after the respective bill after date.

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Note that if the start date of the hold request, hold entity, or hold process is earlier than the system date, the system sets the respective start date to the system date. In addition, if there are pending bills for an account which is kept on hold through a hold request, the system creates an entry for the hold request in the **CI_BILL_DEL_REQUEST** table. You need to then execute the **C1-DELBI** batch which will delete the pending bills of the respective entities along with their bill segments. For more information about the batch, see *Oracle Revenue Management and Billing Batch Guide*.

Let us understand how the bill after date is derived for an account that is kept on hold through a hold request.

The following table illustrates how the bill after date is derived for an account that is kept on hold through a hold request:

Scenario		**Start Date**	**End Date**	**Bill After Date**
Scenario 1	Hold Request 1	01-Jan-2025	31-Jan-2025	-
	Bill Generation Process	01-Jan-2025	31-Jan-2025	
	Account 1	01-Jan-2025	15-Jan-2025	15-Jan-2025
	Account 2	01-Jan-2025	20-Jan-2025	20-Jan-2025
Scenario 2	Hold Request 1	01-Jan-2025	31-Jan-2025	-
	Bill Generation Process	01-Jan-2025	20-Jan-2025	
	Auto Pay Process	01-Jan-2025	25-Jan-2025	
	Account 1	01-Jan-2025	22-Jan-2025	20-Jan-2025
Scenario 3	Hold Request 2	01-Jan-2025	31-Jan-2025	-
	Bill Generation Process	01-Jan-2025	31-Jan-2025	
	Account 3	01-Jan-2025	15-Jan-2025	15-Jan-2025
	Hold Request 3	05-Jan-2025	20-Jan-2025	-
	Bill Generation Process	05-Jan-2025	20-Jan-2025	
	Account 3	05-Jan-2025	20-Jan-2025	20-Jan-2025
	Hold Request 4	10-Jan-2025	25-Jan-2025	-
	Bill Generation Process	10-Jan-2025	25-Jan-2025	
	Account 3	10-Jan-2025	25-Jan-2025	25-Jan-2025
Scenario 4	Hold Request 1	01-Jan-2025	31-Jan-2025	-
	Bill Generation Process	01-Jan-2025	30-Jan-2025	
	Account 1	01-Jan-2025	-	30-Jan-2025
	Account 2	01-Jan-2025	-	30-Jan-2025
Scenario 5	Hold Request 1	01-Jan-2025	31-Jan-2025	-
	Bill Generation Process	01-Jan-2025	-	
	Account 1	01-Jan-2025	-	31-Jan-2025

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Scenario		**Start Date**	**End Date**	**Bill After Date**
	Account 2	01-Jan-2025	-	31-Jan-2025
Scenario 6	Hold Request 1	01-Jan-2025	20-Jan-2025	-
	Bill Generation Process	01-Jan-2025	-	-
	Account 1	01-Jan-2025	15-Jan-2025	15-Jan-2025
	Account 2	01-Jan-2025	-	20-Jan-2025

In the scenario 1, the bill after date for the Account 1 is set to 15-Jan-2025 and the bill after date for the Account 2 is set to 20-Jan-2025. This is because the entity end date is earlier than the bill generation process end date. However, in the scenario 2, the bill after date for the Account 1 is set to 20-Jan-2025. This is because the bill generation process end date is earlier than the entity end date.

In the scenario 3, three hold requests are created with different hold reasons to keep the Account 3 on hold for different duration. In this case, the bill after date of the Account 3 is updated every time a new hold request is created for the same account. On 1st Jan, the bill after date of the Account 3 is set to 15-Jan-2025 and then on 5th Jan, the bill after date of the Account 3 is updated to 20-Jan-2025, and finally, on 10th Jan, the bill after date of the Account 3 is updated to 25-Jan-2025.

In the scenario 4, the bill after date for the Account 1 and Account 2 is set to 30-Jan-2025. This is because the system sets the bill after date to the bill generation process end date when the entity end date is not specified in the hold request. In the scenario 5, the bill after date for the Account 1 and Account 2 is set to 31-Jan-2025. This is because the system sets the bill after date to hold request end date when both the entity end date and bill generation process end date are not specified in the hold request. In the scenario 6, the bill after date for the Account 1 and Account 2 is set to 15-Jan-2025 and 20-Jan-2025, respectively.

In all the above scenarios, the start date of the hold request, hold process, and hold entity is same. Therefore, the bill after date is derived for the entities either immediately or in the deferred mode (when the **C1-HLDRQ** batch is executed). However, if the start date of the bill generation process or hold entity is later than the hold request start date, then bill after date is derived for the respective entity in the deferred mode (when the **C1-HLMON** batch is executed on or after the bill generation process or hold entity start date). For example,

Scenario		**Start Date**	**End Date**	**Bill After Date**
Scenario 1	Hold Request 1	01-Jan-2025	31-Jan-2025	-
	Bill Generation Process	01-Jan-2025	31-Jan-2025	
	Account 1	01-Jan-2025	15-Jan-2025	15-Jan-2025
	Account 2	05-Jan-2025	20-Jan-2025	20-Jan-2025
Scenario 2	Hold Request 1	01-Jan-2025	31-Mar-2025	-
	Bill Generation Process	15-Mar-2025	31-Mar-2025	
	Auto Pay Process	01-Mar-2025	31-Mar-2025	
	Account 1	01-Mar-2025	31-Mar-2025	31-Mar-2025

In the scenario 1, the bill after date for the Account 1 can be derived on 01-Jan-2025 (in the online mode), or on or after 01-Jan-2025 (in the deferred mode). However, the bill after date for the Account 2 will be derived on or after 05-Jan-2025 (in the deferred mode). Similarly, in the scenario 2, the bill after date for the Account 1 is derived on or after 15-Mar-2025 (in the deferred mode) and not on 01-Mar-2025.

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Note:

The bill after date then appears corresponding to the account in the **Hold Entities** zone of the **Hold Request** screen. In addition, it appears in the **Bill On or After Date** field on the **Main** tab of the **Account** screen.

On activating a hold request for a person, the system sets the bill after date to the entity end date or process end date whichever is earlier either for all the accounts in the person's hierarchy or only for the persons' immediate accounts depending on whether the **Hierarchy** option is selected or not. Note that the system considers only the child persons and not the grandchild persons from the person's hierarchy and then derives the accounts where the child person is the main customer. The way in which the bill after date is derived for the person's accounts is same as that of an individual account kept on hold through a hold request.

Note that if the start date of the hold request, hold entity, or hold process is earlier than the system date, the system sets the respective start date to the system date. In addition, if there are pending bills for a person which is kept on hold through a hold request, the system creates an entry for the hold request in the **CI_BILL_DEL_REQUEST** table. You need to then execute the **C1-DELBI** batch which will delete the pending bills of the respective entities along with their bill segments. For more information about the batch, see *Oracle Revenue Management and Billing Batch Guide*.

Note: The bill after date then appears in the **Bill On or After Date** field on the **Main** tab of the **Account** screen.

If the number of accounts in the hold request is less than or equal to the defer processing count (specified in the respective hold request type), the system immediately sets the bill after date for the respective accounts. However, if the number of accounts in the hold request is greater than the defer processing count, the system sets the bill after date for the respective accounts in the deferred mode when the **C1-HLDRQ** batch is executed. Note that when the entity level is set to **Person**, the system always sets the bill after date for the respective accounts in the deferred mode when the **C1-HLDRQ** batch is executed.

Bill Generation Hold Release

On releasing a hold request for an account, the system clears the bill after date for the respective account. This will enable the business to bill the account immediately on the same day when the hold is released.

Let us understand how the bill after date is updated for an account when the hold is manually or automatically released.

Scenario		**Start Date**	**End Date**	**Manual Release**	**Automatic Release**	**Release Date**	**Bill After Date**
Scenario 1	Hold Request 1	01-Jan-2025	31-Jan-2025	Yes	No	10-Jan-2025 (System Date)	-
	Bill Generation Process	01-Jan-2025	31-Jan-2025				
	Account 1	01-Jan-2025	15-Jan-2025				-
	Account 2	01-Jan-2025	20-Jan-2025				-
Scenario 2	Hold Request 1	01-Jan-2025	31-Jan-2025	No	Yes	20-Jan-2025 (Batch Business Date)	-
	Bill Generation Process	01-Jan-2025	20-Jan-2025				
	Auto Pay Process	01-Jan-2025	25-Jan-2025				
	Account 1	01-Jan-2025	22-Jan-2025				-
Scenario 3	Hold Request 2	01-Jan-2025	31-Jan-2025	Yes	No	10-Jan-2025 (System Date)	-
	Bill Generation Process	01-Jan-2025	31-Jan-2025				
	Account 3	01-Jan-2025	15-Jan-2025				25-Jan-2025
	Hold Request 3	05-Jan-2025	20-Jan-2025	Yes	No	20-Jan-2025 (System Date)	25-Jan-2025
	Bill Generation Process	05-Jan-2025	20-Jan-2025				

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Scenario		Start Date	End Date	Manual Release	Automatic Release	Release Date	Bill After Date
	Account 3	05-Jan-2025	20-Jan-2025				-
	Hold Request 4	10-Jan-2025	25-Jan-2025	Yes	No	21-Jan-2025 (System Date)	
	Bill Generation Process	10-Jan-2025	25-Jan-2025				
	Account 3	10-Jan-2025	25-Jan-2025				-

In the scenario 1, the bill after date for the Account 1 and Account 2 is cleared when the hold request is manually released on 10-Jan-2025. In the scenario 2, the bill after date for the Account 1 is cleared when the hold request is automatically released through the **C1-HLMON** batch on 20-Jan-2025.

In the scenario 3, the bill after date for the Account 3 is not cleared when the hold request 2 and 3 are manually released on 10-Jan-2025 and 20-Jan-2025, respectively. The bill after date for the Account 3 is cleared when the hold request 4 is manually released on 21-Jan-2025. This is because no more hold requests exist for the Account 3 in the system.

Note: The bill after date is cleared corresponding to the account in the **Hold Entities** zone of the **Hold Request** screen. In addition, it is cleared from the **Bill On or After Date** field on the **Main** tab of the **Account** screen.

On releasing a hold request for a person, the system clears the bill after date either for all the accounts in the person's hierarchy or only for the persons' immediate accounts depending on whether the **Hierarchy** option is selected or not. Note that the system considers only the child persons and not the grandchild persons from the person's hierarchy and then derives the accounts where the child person is the main customer. The way in which the bill after date is updated for the person's accounts is same as that of an individual account whose hold is released either manually or automatically.

Note: The bill after date is cleared from the **Bill On or After Date** field on the **Main** tab of the **Account** screen.

If the number of accounts in the hold request is less than or equal to the defer processing count (specified in the respective hold request type), the system immediately clears the bill after date for the respective accounts. However, if the number of accounts in the hold request is greater than the defer processing count, the system clears the bill after date for the respective accounts in the deferred mode when the **C1-HLMON** batch is executed. Note that when the entity level is set to **Person**, the system always clears the bill after date for the respective accounts in the deferred mode when the **C1-HLMON** batch is executed.

Hold Delinquency

Oracle Revenue Management and Billing enables you to hold the delinquency process for a person or an account through a hold request. If the delinquency process is kept on hold for an account, the system does not allow you to continue the delinquency process (if any) created for the account. Similarly, if the delinquency process is kept on hold for a person, the system does not allow you to continue the delinquency process (if any) created for the person and its accounts.

Note:

The system allows you to select the **Delinquency** option in the hold request only when the entity level is set to **Person** or **Account** and not when the entity level is set to **Bill**.

You cannot select both the **Overdue** and **Delinquency** processes at the same time in the hold request. The **Overdue** process is valid for the financial services and health insurance domains, but the **Delinquency** process is valid only for the health insurance domain.

You should not select the **Overdue** process in one hold request and the **Delinquency** process in another hold request for the same account in the same hold period.

While adding the delinquency process in a hold request, you need to specify the date range for which you want to hold the delinquency process for the persons or accounts. The system enables you to hold the delinquency process while creating a hold request from the user interface or through the upload request feature. If you want to create a hold request

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to hold the delinquency process for a person or an account through the upload request feature, you need to specify the following details in the CSV file:

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

You can also create, update, or release a hold request through an inbound web service. For more information, see Hold Request Creation, Modification, Release, and View Through Inbound Web Service on page 3875.

Delinquency Hold Activation

On activating a hold request for an account, the system sets the postpone credit review until date corresponding to the accounts whose date range falls within the delinquency process date range of the hold request. The postpone credit review until date is set to the hold entity end date or delinquency process end date whichever is earlier. If the postpone credit review until date stamped on the delinquent account is later than the system date, the system will then hold the delinquency process, if any, initiated for the account. Note that if the start date of the hold request, hold entity, or hold process is earlier than the system date, the system sets the respective start date to the system date.

Let us understand how the postpone credit review until date is derived for an account that is kept on hold through a hold request.

Scenario		**Start Date**	**End Date**	**Postpone Credit Review Until Date**
Scenario 1	Hold Request 1	01-Jan-2025	31-Jan-2025	-
	Delinquency Process	01-Jan-2025	31-Jan-2025	
	Account 1	01-Jan-2025	15-Jan-2025	15-Jan-2025
	Account 2	01-Jan-2025	20-Jan-2025	20-Jan-2025
Scenario 2	Hold Request 1	01-Jan-2025	31-Jan-2025	-
	Delinquency Process	01-Jan-2025	20-Jan-2025	
	Bill Generation Process	01-Jan-2025	25-Jan-2025	
	Account 1	01-Jan-2025	22-Jan-2025	20-Jan-2025
Scenario 3	Hold Request 2	01-Jan-2025	31-Jan-2025	-
	Delinquency Process	01-Jan-2025	31-Jan-2025	
	Account 3	01-Jan-2025	15-Jan-2025	15-Jan-2025
	Hold Request 3	05-Jan-2025	20-Jan-2025	-
	Delinquency Process	05-Jan-2025	20-Jan-2025	
	Account 3	05-Jan-2025	20-Jan-2025	20-Jan-2025
	Hold Request 4	10-Jan-2025	25-Jan-2025	-
	Delinquency Process	10-Jan-2025	25-Jan-2025	
	Account 3	10-Jan-2025	25-Jan-2025	25-Jan-2025
Scenario 4	Hold Request 1	01-Jan-2025	31-Jan-2025	-
	Delinquency Process	01-Jan-2025	30-Jan-2025	
	Account 1	01-Jan-2025	-	30-Jan-2025
	Account 2	01-Jan-2025	-	30-Jan-2025

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Scenario		**Start Date**	**End Date**	**Postpone Credit Review Until Date**
Scenario 5	Hold Request 1	01-Jan-2025	31-Jan-2025	-
	Delinquency Process	01-Jan-2025	-	
	Account 1	01-Jan-2025	-	31-Jan-2025
	Account 2	01-Jan-2025	-	31-Jan-2025
Scenario 6	Hold Request 1	01-Jan-2025	20-Jan-2025	-
	Delinquency Process	01-Jan-2025	-	-
	Account 1	01-Jan-2025	15-Jan-2025	15-Jan-2025
	Account 2	01-Jan-2025	-	20-Jan-2025

In the scenario 1, the postpone credit review until date for the Account 1 is set to 15-Jan-2025 and the postpone credit review until date for the Account 2 is set to 20-Jan-2025. This is because the entity end date is earlier than the delinquency process end date. However, in the scenario 2, the postpone credit review until date for the Account 1 is set to 20-Jan-2025. This is because the delinquency process end date is earlier than the entity end date.

In the scenario 3, three hold requests are created with different hold reasons to keep the Account 3 on hold for different duration. In this case, the postpone credit review until date of the Account 3 is updated every time a new hold request is created for the same account. On 1st Jan, the postpone credit review until date of the Account 3 is set to 15-Jan-2025 and then on 5th Jan, the postpone credit review until date of the Account 3 is updated to 20-Jan-2025, and finally, on 10th Jan, the postpone credit review until date of the Account 3 is updated to 25-Jan-2025.

In the scenario 4, the postpone credit review until date for the Account 1 and Account 2 is set to 30-Jan-2025. This is because the system sets the postpone credit review until date to the delinquency process end date when the entity end date is not specified in the hold request. In the scenario 5, the postpone credit review until date for the Account 1 and Account 2 is set to 31-Jan-2025. This is because the system sets the postpone credit review until date to hold request end date when both the entity end date and delinquency process end date are not specified in the hold request. In the scenario 6, the postpone credit review until date for the Account 1 and Account 2 is set to 15-Jan-2025 and 20-Jan-2025, respectively.

In all the above scenarios, the start date of the hold request, hold process, and hold entity is same. Therefore, the postpone credit review until date is derived for the entities either immediately or in the deferred mode (when the **C1-HLDRQ** batch is executed). However, if the start date of the delinquency process or hold entity is later than the hold request start date, the postpone credit review until date is derived for the respective entity in the deferred mode (when the **C1-HLMON** batch is executed on or after delinquency process or hold entity start date). For example,

Scenario		**Start Date**	**End Date**	**Postpone Credit Review Until Date**
Scenario 1	Hold Request 1	01-Jan-2025	31-Jan-2025	-
	Delinquency Process	01-Jan-2025	31-Jan-2025	
	Account 1	01-Jan-2025	15-Jan-2025	15-Jan-2025
	Account 2	05-Jan-2025	20-Jan-2025	20-Jan-2025
Scenario 2	Hold Request 1	01-Mar-2025	31-Mar-2025	-
	Delinquency Process	15-Mar-2025	31-Mar-2025	
	Bill Generation Process	01-Mar-2025	31-Mar-2025	
	Account 1	01-Mar-2025	31-Mar-2025	31-Mar-2025

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In the scenario 1, the postpone credit review until date for the Account 1 is derived on 01-Jan-2025 (in the online mode), or on or after 01-Jan-2025 (in the deferred mode). However, the postpone credit review until date for the Account 2 is derived on or after 05-Jan-2025 (in the deferred mode). Similarly, in the scenario 2, the postpone credit review until date for the Account 1 is derived on or after 15-Mar-2025 (in the deferred mode) and not on 01-Mar-2025.

Note: The postpone credit review until date then appears corresponding to the account in the **Hold Entities** zone of the **Hold Request** screen. In addition, it appears in the **Postpone Credit Review Until** field on the **C & C** tab of the **Account** screen.

On activating a hold request for a person, the system sets postpone credit review until date to the entity end date or process end date whichever is earlier for the respective person and its immediate accounts (where the person is the main customer). If the postpone credit review until date does not exist for the person or if the postpone credit review until date already exists for the person but is earlier than the system date, then the postpone credit review until date is set to the entity end date or process end date whichever is earlier. However, if the postpone credit review until date already exists for the person but is later than the derived hold end date (i.e., entity end date or process end date whichever is earlier), then the postpone credit review until date of the person is not updated.

If the postpone credit review until date does not exist for the person's immediate account or if the postpone credit review until date already exists for the person's immediate account but is earlier than the derived hold end date, then the postpone credit review until date is set to the derived hold end date. However, if the postpone credit review until date already exists for the person's immediate account but is later than the derived hold end date, then the postpone credit review until date of the account is not updated.

If the **Hierarchy** option is selected for the person, the system sets the postpone credit review until date for the person, its immediate accounts, its child persons, and for the child persons' accounts. Note that the system considers only the child persons and not the grandchild persons from the person's hierarchy and then derives the accounts where the child person is the main customer. If the postpone credit review until date does not exist for the person's child person or if the postpone credit review until date already exists for the person's child person but is earlier than the derived hold end date, then the postpone credit review until date is set to the derived hold end date. However, if the postpone credit review until date already exists for the person's child person but is later than the derived hold end date, then the postpone credit review until date of the child person is not updated.

Similarly, if the postpone credit review until date does not exist for the child person's account or if the postpone credit review until date already exists for the child person's account but is earlier than the derived hold end date, then the postpone credit review until date is set to the derived hold end date. However, if the postpone credit review until date already exists for the child person's account but is later than the derived hold end date, then the postpone credit review until date of the child person's account is not updated.

If the postpone credit review until date stamped on the delinquent person or account is later than the system date, the system will then hold the delinquency process, if any, initiated for the person or account. Note that if the start date of the hold request, hold entity, or hold process is earlier than the system date, the system sets the respective start date to the system date.

Note:

On executing the **C1-DPMON** batch, the status of the delinquency process is then changed to **On Hold** when the algorithm (i.e., **C1-HLDDELPRC**) attached to the **Hold Delinquency Process Criteria** system event in the respective delinquency process type is triggered.

The postpone credit review until date then appears corresponding to the person in the **Hold Entities** zone of the **Hold Request** screen. In addition, the postpone credit review until date of the account appears in the **Postpone Credit Review Until** field on the **C & C** tab of the **Account** screen.

If the **Delinquency** process is added in the hold request, the system derives the entity level of the hold request. If the entity level is set to **Account**, the system checks whether any individual or group membership is billed to the account. If an individual membership is billed to the account, the system determines whether the number of entities in the hold request exceeds the defer processing count (specified in the respective hold request type). If the number of entities in the hold request is less than or equal to the defer processing count, the system sets the status of the hold request to **Active**. In addition, it immediately sets the postpone credit review until date for the respective account. However, if the number

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of entities in the hold request is greater than the defer processing count, the system sets the status of the hold request to **Deferred Processing**. The system then sets the postpone credit review until date for the respective accounts in the deferred mode when the **C1-HLDRQ** batch is executed.

However, if a group membership is billed to the account, the system does not use the defer processing count. It sets the status of the hold request to **Active**. It then sets the postpone credit review until date for the respective accounts in the deferred mode when the **C1-HLMON** batch is executed. Similarly, if the entity level is set to **Person**, the system does not use the defer processing count. It sets the status of the hold request to **Active**. It then sets the postpone credit review until date for the respective persons and its accounts in the deferred mode when the **C1-HLMON** batch is executed.

Note: You need to execute the **C1-DPMON** batch after executing the **C1-HLDRQ** or **C1-HLMON** batch.

Delinquency Hold Release

On releasing a hold request for an account, the system sets the postpone credit review until date to the system date for the respective account. Let us understand how the postpone credit review until date is updated for an account when the hold is manually or automatically released.

Scenario		**Start Date**	**End Date**	**Manual Release**	**Automatic Release**	**Release Date**	**Postpone Credit Review Until Date**
Scenario 1	Hold Request 1	01-Jan-2025	31-Jan-2025	Yes	No	10-Jan-2025 (System Date)	-
	Delinquency Process	01-Jan-2025	31-Jan-2025				
	Account 1	01-Jan-2025	15-Jan-2025				-
	Account 2	01-Jan-2025	20-Jan-2025				-
Scenario 2	Hold Request 1	01-Jan-2025	31-Jan-2025	No	Yes	20-Jan-2025 (Batch Business Date)	-
	Delinquency Process	01-Jan-2025	20-Jan-2025				
	Auto Pay Process	01-Jan-2025	25-Jan-2025				
	Account 1	01-Jan-2025	22-Jan-2025				-
Scenario 3	Hold Request 2	01-Jan-2025	31-Jan-2025	Yes	No	10-Jan-2025 (System Date)	-
	Delinquency Process	01-Jan-2025	31-Jan-2025				
	Account 3	01-Jan-2025	15-Jan-2025				25-Jan-2025
	Hold Request 3	05-Jan-2025	20-Jan-2025	Yes	No	20-Jan-2025 (System Date)	-
	Delinquency Process	05-Jan-2025	20-Jan-2025				
	Account 3	05-Jan-2025	20-Jan-2025				25-Jan-2025
	Hold Request 4	10-Jan-2025	25-Jan-2025	Yes	No	21-Jan-2025 (System Date)	-
	Delinquency Process	10-Jan-2025	25-Jan-2025				
	Account 3	10-Jan-2025	25-Jan-2025				-

In the scenario 1, the postpone credit review until date for the Account 1 and Account 2 is set to the system date when the hold request is manually released on 10-Jan-2025. In the scenario 2, the postpone credit review until date for the Account 1 is set to the batch business date (i.e., 20-Jan-2025) when the hold request is automatically released through the **C1-HLMON** batch on 20-Jan-2025.

In the scenario 3, the postpone credit review until date for the Account 3 is not set to the system date when the hold request 2 and 3 are manually released on 10-Jan-2025 and 20-Jan-2025, respectively. The postpone credit review until

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date for the Account 3 is set to the system date when the hold request 4 is manually released on 21-Jan-2025. This is because no more hold requests exist for the Account 3 in the system.

Note: The postpone credit review until date then appears corresponding to the account in the **Hold Entities** zone of the **Hold Request** screen. In addition, it appears in the **Postpone Credit Review Until** field on the **C & C** tab of the **Account** screen.

On releasing a hold request for a person, the system sets the postpone credit review until date to the system date for the respective person and its immediate accounts (where the person is the main customer). If the **Hierarchy** option is selected for the person, the system sets the postpone credit review until date for the person, its immediate accounts, its child persons, and for the child persons' accounts. Note that the system considers only the child persons and not the grandchild persons from the person's hierarchy and then derives the accounts where the child person is the main customer. The way in which the postpone credit review until date is updated for the person, its immediate accounts, its child persons, and its child persons' accounts is same as that of an individual account whose hold is released either manually or automatically.

Note: The postpone credit review until date then appears corresponding to the person in the **Hold Entities** zone of the **Hold Request** screen. In addition, the postpone credit review until date of the account appears in the **Postpone Credit Review Until** field on the **C & C** tab of the **Account** screen.

The system does not consider the defer processing count while releasing a hold request where the delinquency process is kept on hold for an account or a person. The system sets the postpone credit review until date in the deferred mode when the **C1-HLMON** batch is executed.

Note: You need to execute the **C1-DPMON** batch after executing the **C1-HLMON** batch.

Hold Funding

Oracle Revenue Management and Billing enables you to hold the funding process for a person, account, or a bill through a hold request. If the funding process is kept on hold for a bill, the system does not allow you to add the bill in a funding request. If the funding process is kept on hold for an account, the system does not allow you to add any bills of the account in a funding request. However, if the funding process is kept on hold for a person, the system does not allow you to add any bills of any of its accounts in a funding request.

Note: The system allows you to select the **Funding** option in the hold request when the entity level is set to **Person**, **Account**, or **Bill**.

While adding the funding process in a hold request, you need to specify the date range for which you want to hold the funding process for the persons, accounts, or bills. The system enables you to hold the funding process by creating a hold request from the user interface or through the upload request feature. If you want to create a hold request to hold the funding process for a person, account, or a bill through the upload request feature, you need to specify the following details in the CSV file:

- Whether you want to hold the funding process for the person, account, or bill (the valid values are **Y** or **N**)
- Hold funding start date (required if the hold auto pay is set to **Y**)
- Hold funding end date

You can also create, update, or release a hold request through an inbound web service. For more information, see Hold Request Creation, Modification, Release, and View Through Inbound Web Service on page 3875.

Funding Hold Activation

On activating a hold request for a bill, the system does not allow you to add the bill in a funding request. On activating a hold request for an account, the system does not allow you to add any bills of the account in a funding request. However, on activating a hold request for a person, the system does not allow you to add any bills of any of its accounts in a funding request. In addition, if the **Hierarchy** option is selected, the system does not allow you to add any bills of the accounts in

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the person's hierarchy in a funding request. Note that the system considers only the child persons and not the grandchild persons from the person's hierarchy and then derives the accounts where the child person is the main customer.

Note that if the start date of the hold request, hold entity, or hold process is earlier than the system date, the system sets the respective start date to the system date.

Funding Hold Release

On releasing a hold request for a bill, the system allows you to add the bill in a funding request. On releasing a hold request for an account, the system allows you to add any bills of the account in a funding request. However, on releasing a hold request for a person, the system allows you to add any bills of any of its accounts including its child persons' bills (if the **Hierarchy** option is selected) in a funding request.

Hold Overdue Process

Oracle Revenue Management and Billing enables you to hold the overdue process for an account through a hold request. If the overdue process is kept on hold for an account, the system does not allow you to initiate an overdue process for the account. In addition, if an active overdue process (if any) exists for the account kept on hold, the system cancels the respective overdue process of the account and changes its status to **Inactive**.

Note:

The system allows you to select the **Overdue** option in the hold request only when the entity level is set to **Account** and not when the entity level is set to **Person** or **Bill**.

You cannot select both the **Overdue** and **Delinquency** processes at the same time in the hold request. The **Overdue** process is valid for the financial services and health insurance domains, but the **Delinquency** process is valid only for the health insurance domain.

You should not select the **Overdue** process in one hold request and the **Delinquency** process in another hold request for the same account in the same hold period.

The existing active overdue process (if any) is inactivated only when the following conditions are met:

- The **CI_COPAICP** algorithm is attached to the **Cancel Logic** system event of the respective overdue process template.
- The **CI_OE-NO-DEP** algorithm is attached to the **Cancel Logic** system event of the respective overdue event type.

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

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

You can also create, update, or release a hold request through an inbound web service. For more information, see Hold Request Creation, Modification, Release, and View Through Inbound Web Service on page 3875.

Overdue Hold Activation

On activating a hold request for an account, the system sets the postpone credit review until date corresponding to the accounts whose date range falls within the overdue process date range of the hold request. The postpone credit review until date is set to the hold entity end date or overdue process end date whichever is earlier. This means that the system will allow to initiate an overdue process for the account only after the respective postpone credit review until date. Note that if the start date of the hold request, hold entity, or hold process is earlier than the system date, the system sets the respective start date to the system date.

Let us understand how the postpone credit review until date is derived for an account that is kept on hold through a hold request.

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Scenario		**Start Date**	**End Date**	**Postpone Credit Review Until Date**
Scenario 1	Hold Request 1	01-Jan-2025	31-Jan-2025	-
	Overdue Process	01-Jan-2025	31-Jan-2025	
	Account 1	01-Jan-2025	15-Jan-2025	15-Jan-2025
	Account 2	01-Jan-2025	20-Jan-2025	20-Jan-2025
Scenario 2	Hold Request 1	01-Jan-2025	31-Jan-2025	-
	Overdue Process	01-Jan-2025	20-Jan-2025	
	Auto Pay Process	01-Jan-2025	25-Jan-2025	
	Account 1	01-Jan-2025	22-Jan-2025	20-Jan-2025
Scenario 3	Hold Request 2	01-Jan-2025	31-Jan-2025	-
	Overdue Process	01-Jan-2025	31-Jan-2025	
	Account 3	01-Jan-2025	15-Jan-2025	15-Jan-2025
	Hold Request 3	05-Jan-2025	20-Jan-2025	-
	Overdue Process	05-Jan-2025	20-Jan-2025	
	Account 3	05-Jan-2025	20-Jan-2025	20-Jan-2025
	Hold Request 4	10-Jan-2025	25-Jan-2025	-
	Overdue Process	10-Jan-2025	25-Jan-2025	
	Account 3	10-Jan-2025	25-Jan-2025	25-Jan-2025
Scenario 4	Hold Request 1	01-Jan-2025	31-Jan-2025	-
	Overdue Process	01-Jan-2025	30-Jan-2025	
	Account 1	01-Jan-2025	-	30-Jan-2025
	Account 2	01-Jan-2025	-	30-Jan-2025
Scenario 5	Hold Request 1	01-Jan-2025	31-Jan-2025	-
	Overdue Process	01-Jan-2025	-	
	Account 1	01-Jan-2025	-	31-Jan-2025
	Account 2	01-Jan-2025	-	31-Jan-2025
Scenario 6	Hold Request 1	01-Jan-2025	20-Jan-2025	-
	Overdue Process	01-Jan-2025	-	-
	Account 1	01-Jan-2025	15-Jan-2025	15-Jan-2025
	Account 2	01-Jan-2025	-	20-Jan-2025

In the scenario 1, the postpone credit review until date for the Account 1 is set to 15-Jan-2025 and the postpone credit review until date for the Account 2 is set to 20-Jan-2025. This is because the entity end date is earlier than the overdue process end date. However, in the scenario 2, the postpone credit review until date for the Account 1 is set to 20-Jan-2025. This is because the overdue process end date is earlier than the entity end date.

In the scenario 3, three hold requests are created with different hold reasons to keep the Account 3 on hold for different duration. In this case, the postpone credit review until date of the Account 3 is updated every time a new hold request

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is created for the same account. On 1st Jan, the postpone credit review until date of the Account 3 is set to 15-Jan-2025 and then on 5th Jan, the postpone credit review until date of the Account 3 is updated to 20-Jan-2025, and finally, on 10th Jan, the postpone credit review until date of the Account 3 is updated to 25-Jan-2025.

In the scenario 4, the postpone credit review until date for the Account 1 and Account 2 is set to 30-Jan-2025. This is because the system sets the postpone credit review until date to the overdue process end date when the entity end date is not specified in the hold request. In the scenario 5, the postpone credit review until date for the Account 1 and Account 2 is set to 31-Jan-2025. This is because the system sets the postpone credit review until date to hold request end date when both the entity end date and overdue process end date are not specified in the hold request. In the scenario 6, the postpone credit review until date for the Account 1 and Account 2 is set to 15-Jan-2025 and 20-Jan-2025, respectively.

In all the above scenarios, the start date of the hold request, hold process, and hold entity is same. Therefore, the postpone credit review until date is derived for the entities either immediately or in the deferred mode (when the **C1-HLDRQ** batch is executed). However, if the start date of the overdue process or hold entity is later than the hold request start date, the postpone credit review until date is derived for the respective entity in the deferred mode (when the **C1-HLMON** batch is executed on or after the overdue process or hold entity start date). For example,

Scenario		**Start Date**	**End Date**	**Postpone Credit Review Until Date**
Scenario 1	Hold Request 1	01-Jan-2025	31-Jan-2025	-
	Overdue Process	01-Jan-2025	31-Jan-2025	
	Account 1	01-Jan-2025	15-Jan-2025	15-Jan-2025
	Account 2	05-Jan-2025	20-Jan-2025	20-Jan-2025
Scenario 2	Hold Request 1	01-Mar-2025	31-Mar-2025	-
	Overdue Process	15-Mar-2025	31-Mar-2025	
	Auto Pay Process	01-Mar-2025	31-Mar-2025	
	Account 1	01-Mar-2025	31-Mar-2025	31-Mar-2025

In the scenario 1, the postpone credit review until date for the Account 1 is derived on 01-Jan-2025 (in the online mode), or on or after 01-Jan-2025 (in the deferred mode). However, the postpone credit review until date for the Account 2 is derived on or after 05-Jan-2025 (in the deferred mode). Similarly, in the scenario 2, the postpone credit review until date for the Account 1 is derived on or after 15-Mar-2025 (in the deferred mode) and not on 01-Mar-2025.

Note: The postpone credit review until date then appears corresponding to the account in the **Hold Entities** zone of the **Hold Request** screen. In addition, it appears in the **Postpone Credit Review Until** field on the **C & C** tab of the **Account** screen.

If the number of accounts in the hold request is less than or equal to the defer processing count (specified in the respective hold request type), the system immediately sets the postpone credit review until date for the respective accounts. However, if the number of accounts in the hold request is greater than the defer processing count, the system sets the postpone credit review until date for the respective accounts in the deferred mode when the **C1-HLDRQ** batch is executed.

Overdue Hold Release

On releasing a hold request for an account, the system sets the postpone credit review until date to the system date for the respective account. Let us understand how the postpone credit review until date is updated for an account when the hold is manually or automatically released.

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Scenario		**Start Date**	**End Date**	**Manual Release**	**Automatic Release**	**Release Date**	**Postpone Credit Review Until Date**
Scenario 1	Hold Request 1	01-Jan-2025	31-Jan-2025	Yes	No	10-Jan-2025 (System Date)	-
	Overdue Process	01-Jan-2025	31-Jan-2025				
	Account 1	01-Jan-2025	15-Jan-2025				10-Jan-2025
	Account 2	01-Jan-2025	20-Jan-2025				10-Jan-2025
Scenario 2	Hold Request 1	01-Jan-2025	31-Jan-2025	No	Yes	20-Jan-2025 (Batch Business Date)	-
	Overdue Process	01-Jan-2025	20-Jan-2025				
	Bill Generation Process	01-Jan-2025	25-Jan-2025				
	Account 1	01-Jan-2025	22-Jan-2025				20-Jan-2025
Scenario 3	Hold Request 2	01-Jan-2025	31-Jan-2025	Yes	No	10-Jan-2025 (System Date)	-
	Overdue Process	01-Jan-2025	31-Jan-2025				
	Account 3	01-Jan-2025	15-Jan-2025				25-Jan-2025
	Hold Request 3	05-Jan-2025	20-Jan-2025	Yes	No	20-Jan-2025 (System Date)	25-Jan-2025
	Overdue Process	05-Jan-2025	20-Jan-2025				
	Account 3	05-Jan-2025	20-Jan-2025				25-Jan-2025
	Hold Request 4	10-Jan-2025	25-Jan-2025	Yes	No	21-Jan-2025 (System Date)	-
	Overdue Process	10-Jan-2025	25-Jan-2025				
	Account 3	10-Jan-2025	25-Jan-2025				21-Jan-2025

In the scenario 1, the postpone credit review until date for the Account 1 and Account 2 is set to the system date when the hold request is manually released on 10-Jan-2025. In the scenario 2, the postpone credit review until date for the Account 1 is set to the batch business date (i.e., 20-Jan-2025) when the hold request is automatically released through the **C1-HLMON** batch.

In the scenario 3, the postpone credit review until date for the Account 3 is not set to the system date when the hold request 2 and 3 are manually released on 10-Jan-2025 and 20-Jan-2025, respectively. The postpone credit review until date for the Account 3 is set to the system date when the hold request 4 is manually released on 21-Jan-2025. This is because no more hold requests exist for the Account 3 in the system.

Note: The bill after date is cleared corresponding to the account in the **Hold Entities** zone of the **Hold Request** screen. In addition, it appears in the **Postpone Credit Review Until** field on the **C & C** tab of the **Account** screen.

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If the number of accounts in the hold request is less than or equal to the defer processing count (specified in the respective hold request type), the system immediately sets the postpone credit review until date to the system date for the respective accounts. However, if the number of accounts in the hold request is greater than the defer processing count, the system sets the postpone credit review until date to the system date for the respective accounts in the deferred mode when the **C1-HLMON** batch is executed.

Hold Refund

Oracle Revenue Management and Billing enables you to hold the refund process for an account through a hold request. If the refund process is kept on hold for an account, the system does not process the refund requests (if any) created for the account. Note that the system does not stop you from creating A/P adjustments for an account from the **Adjustment** screen when the refund process is kept on hold for the account.

Note:

The system allows you to select the **Refund** option in the hold request only when the entity level is set to **Account** and not when the entity level is set to **Person** or **Bill**.

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

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

You can also create, update, or release a hold request through an inbound web service. For more information, see Hold Request Creation, Modification, Release, and View Through Inbound Web Service on page 3875.

Refund Hold Activation

On activating a hold request for an account, the system sets the hold refund until date corresponding to the accounts whose date range falls within the refund process date range of the hold request. The hold refund until date is set to the hold entity end date or refund process end date whichever is earlier. This means that the system will allow to process the refund request for the accounts only after the respective hold refund until date. Note that if the start date of the hold request, hold entity, or hold process is earlier than the system date, the system sets the respective start date to the system date.

Let us understand how the hold refund until date is derived for an account that is kept on hold through a hold request.

Scenario		**Start Date**	**End Date**	**Hold Refund Until Date**
Scenario 1	Hold Request 1	01-Jan-2025	31-Jan-2025	-
	Refund Process	01-Jan-2025	31-Jan-2025	
	Account 1	01-Jan-2025	15-Jan-2025	15-Jan-2025
	Account 2	01-Jan-2025	20-Jan-2025	20-Jan-2025
Scenario 2	Hold Request 1	01-Jan-2025	31-Jan-2025	-
	Refund Process	01-Jan-2025	20-Jan-2025	
	Bill Generation Process	01-Jan-2025	25-Jan-2025	
	Account 1	01-Jan-2025	22-Jan-2025	20-Jan-2025

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Scenario		**Start Date**	**End Date**	**Hold Refund Until Date**
Scenario 3	Hold Request 2	01-Jan-2025	31-Jan-2025	-
	Refund Process	01-Jan-2025	31-Jan-2025	
	Account 3	01-Jan-2025	15-Jan-2025	15-Jan-2025
	Hold Request 3	05-Jan-2025	20-Jan-2025	-
	Refund Process	05-Jan-2025	20-Jan-2025	
	Account 3	05-Jan-2025	20-Jan-2025	20-Jan-2025
	Hold Request 4	10-Jan-2025	25-Jan-2025	-
	Refund Process	10-Jan-2025	25-Jan-2025	
	Account 3	10-Jan-2025	25-Jan-2025	25-Jan-2025
Scenario 4	Hold Request 1	01-Jan-2025	31-Jan-2025	-
	Refund Process	01-Jan-2025	30-Jan-2025	
	Account 1	01-Jan-2025	-	30-Jan-2025
	Account 2	01-Jan-2025	-	30-Jan-2025
Scenario 5	Hold Request 1	01-Jan-2025	31-Jan-2025	-
	Refund Process	01-Jan-2025	-	
	Account 1	01-Jan-2025	-	31-Jan-2025
	Account 2	01-Jan-2025	-	31-Jan-2025
Scenario 6	Hold Request 1	01-Jan-2025	20-Jan-2025	-
	Refund Process	01-Jan-2025	-	-
	Account 1	01-Jan-2025	15-Jan-2025	15-Jan-2025
	Account 2	01-Jan-2025	-	20-Jan-2025

In the scenario 1, the hold refund until date for the Account 1 is set to 15-Jan-2025 and the hold refund until date for the Account 2 is set to 20-Jan-2025. This is because the entity end date is earlier than the refund process end date. However, in the scenario 2, the hold refund until date for the Account 1 is set to 20-Jan-2025. This is because the refund process end date is earlier than the entity end date.

In the scenario 3, three hold requests are created with different hold reasons to keep the Account 3 on hold for different duration. In this case, the hold refund until date of the Account 3 is updated every time a new hold request is created for the same account. On 1st Jan, the hold refund until date of the Account 3 is set to 15-Jan-2025 and then on 5th Jan, the hold refund until date of the Account 3 is updated to 20-Jan-2025, and finally, on 10th Jan, the hold refund until date of the Account 3 is updated to 25-Jan-2025.

In the scenario 4, the hold refund until date for the Account 1 and Account 2 is set to 30-Jan-2025. This is because the system sets the hold refund until date to the refund process end date when the entity end date is not specified in the hold request. In the scenario 5, the hold refund until date for the Account 1 and Account 2 is set to 31-Jan-2025. This is because the system sets the hold refund until date to hold request end date when both the entity end date and refund process end date are not specified in the hold request. In the scenario 6, the hold refund until date for the Account 1 and Account 2 is set to 15-Jan-2025 and 20-Jan-2025, respectively.

In all the above scenarios, the start date of the hold request, hold process, and hold entity is same. Therefore, the hold refund until date is derived for the entities either immediately or in the deferred mode (when the **C1-HLDRQ** batch is executed). However, if the start date of the refund process or hold entity is later than the hold request start date, the hold

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refund until date is derived for the respective entity in the deferred mode (when the **C1-HLMON** batch is executed on or after refund process or hold entity start date). For example,

Scenario		**Start Date**	**End Date**	**Hold Refund Until Date**
Scenario 1	Hold Request 1	01-Jan-2025	31-Jan-2025	-
	Refund Process	01-Jan-2025	31-Jan-2025	
	Account 1	01-Jan-2025	15-Jan-2025	15-Jan-2025
	Account 2	05-Jan-2025	20-Jan-2025	20-Jan-2025
Scenario 2	Hold Request 1	01-Mar-2025	31-Mar-2025	-
	Refund Process	15-Mar-2025	31-Mar-2025	
	Bill Generation Process	01-Mar-2025	31-Mar-2025	
	Account 1	01-Mar-2025	31-Mar-2025	31-Mar-2025

In the scenario 1, the hold refund until date for the Account 1 is derived on 01-Jan-2025 (in the online mode), or on or after 01-Jan-2025 (in the deferred mode). However, the hold refund until date for the Account 2 is derived on or after 05-Jan-2025 (in the deferred mode). Similarly, in the scenario 2, the hold refund until date for the Account 1 is derived on or after 15-Mar-2025 (in the deferred mode) and not on 01-Mar-2025.

Note: The hold refund until date then appears corresponding to the account in the **Hold Entities** zone of the **Hold Request** screen.

If the number of accounts in the hold request is less than or equal to the defer processing count (specified in the respective hold request type), the system immediately sets the hold refund until date for the respective accounts. In addition, the system changes the status of the non-final refund request (if any) for the respective accounts to **Hold**. However, if the number of accounts in the hold request is greater than the defer processing count, the system sets the hold refund until date for the respective accounts in the deferred mode when the **C1-HLDRQ** batch is executed. In addition, the **C1-HLDRQ** batch changes the status of the non-final refund request (if any) for the respective accounts to **Hold**.

Refund Hold Release

On releasing a hold request for an account, the system sets the hold refund until date to the system date for the respective accounts. Let us understand how the hold refund until date is updated for an account when the hold is manually or automatically released.

Scenario		**Start Date**	**End Date**	**Manual Release**	**Automatic Release**	**Release Date**	**Hold Refund Until Date**
Scenario 1	Hold Request 1	01-Jan-2025	31-Jan-2025	Yes	No	10-Jan-2025 (System Date)	-
	Refund Process	01-Jan-2025	31-Jan-2025				
	Account 1	01-Jan-2025	15-Jan-2025				10-Jan-2025
	Account 2	01-Jan-2025	20-Jan-2025				10-Jan-2025
Scenario 2	Hold Request 1	01-Jan-2025	31-Jan-2025	No	Yes	20-Jan-2025 (Batch Business Date)	-
	Refund Process	01-Jan-2025	20-Jan-2025				

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Scenario		Start Date	End Date	Manual Release	Automatic Release	Release Date	Hold Refund Until Date
	Bill Generation Process	01-Jan-2025	25-Jan-2025				
	Account 1	01-Jan-2025	22-Jan-2025				20-Jan-2025
Scenario 3	Hold Request 2	01-Jan-2025	31-Jan-2025	Yes	No	10-Jan-2025 (System Date)	-
	Refund Process	01-Jan-2025	31-Jan-2025				
	Account 3	01-Jan-2025	15-Jan-2025				25-Jan-2025
	Hold Request 3	05-Jan-2025	20-Jan-2025	Yes	No	20-Jan-2025 (System Date)	25-Jan-2025
	Refund Process	05-Jan-2025	20-Jan-2025				
	Account 3	05-Jan-2025	20-Jan-2025				25-Jan-2025
	Hold Request 4	10-Jan-2025	25-Jan-2025	Yes	No	21-Jan-2025 (System Date)	-
	Refund Process	10-Jan-2025	25-Jan-2025				
	Account 3	10-Jan-2025	25-Jan-2025				21-Jan-2025

In the scenario 1, the hold refund until date for the Account 1 and Account 2 is set to the system date when the hold request is manually released on 10-Jan-2025. In the scenario 2, the hold refund until date for the Account 1 is set to the batch business date (i.e., 20-Jan-2025) when the hold request is automatically released through the **C1-HLMON** batch.

In the scenario 3, the hold refund until date for the Account 3 is not set to the system date when the hold request 2 and 3 are manually released on 10-Jan-2025 and 20-Jan-2025, respectively. The hold refund until date for the Account 3 is set to the system date when the hold request 4 is manually released on 21-Jan-2025. This is because no more hold requests exist for the Account 3 in the system.

Note: The hold refund until date then appears corresponding to the account in the **Hold Entities** zone of the **Hold Request** screen.

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

Hold Mass Accounts Using Selection Criteria

Oracle Revenue Management and Billing enables you to add multiple accounts in a hold request by specifying their respective account ID. Alternatively, you can also specify the selection criteria to derive the list of accounts that you want to add in a hold request. The **Use Selection Criteria** option is available when you set the entity level to **Account** while creating a hold request. On selecting the **Use Selection Criteria** option, the **Hold Entities** section is removed from

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the **Hold Request** screen. Instead, a section named **Account Selection Criteria** appears in the **Hold Request** screen. This section enables you to specify the criteria for deriving accounts using the account, person, policy, or individual membership details. You can specify the criteria for deriving accounts using the policy or individual membership details only when the **Environment Type** option type of the **SYSDT** feature configuration is set to **H**.

On saving a hold request with the account selection criteria, the system does the following:

- Sets the **massHoldSw** field of the hold request to **Y**
- Creates the hold request in the **Entity Derivation Pending** status

Note: You cannot edit the account selection criteria when the hold request is in the **Entity Derivation Pending** status.

However, while saving a hold request without the account selection criteria, the system does the following:

- Sets the **massHoldSw** field of the hold request to **N**
- Creates the hold request in the **Draft** status

The **C1-HLDET** batch then checks whether there are any hold requests in the **Entity Derivation Pending** status. The system considers those hold requests whose start date is earlier than or equal to batch business date. If there is a hold request in the **Entity Derivation Pending** status, the batch derives the accounts based on the criteria defined for the hold request. The derived accounts are stored as the hold entities for the hold request in the **C1_HOLD_REQ_DTLS** table. The start date of all the hold entities is set to the system date and end date is set to null. Finally, the **massHoldSw** field of the hold request is set to **N** and the status of the hold request is changed from **Entity Derivation Pending** to **Draft**. For more information about the batch, see *Oracle Revenue Management and Billing Batch Guide*.

Once the status of the hold request is changed to **Draft**, you can modify the required details of the hold request expect the filter criteria. You can add more accounts (if required) manually from the user interface. You can also edit or delete the accounts derived through the filter criteria from the hold request. On activating a hold request created using a selection criterion, the start date of the hold request, hold entity, or hold process is not changed when it is earlier than the system date.

Related Topics

For more information on...	See...
How to define an account selection criteria	Defining an Account Selection Criteria for a Hold Request on page 1932

Hold Mass Persons Using Selection Criteria

Oracle Revenue Management and Billing enables you to add multiple persons in a hold request by specifying their respective person ID. Here, you can select the **Hierarchy** option corresponding to the person indicating that you want to hold the processes of the person, its immediate accounts, its child persons, and its child persons' accounts. Note that the system considers only the child persons and not the grandchild persons from the person's hierarchy.

Alternatively, you can also specify the selection criteria to derive the list of persons that you want to add in a hold request. The **Use Selection Criteria** option is available when you set the entity to **Person** while creating a hold request. On selecting the **Use Selection Criteria** option, the **Hold Entities** section is removed from the **Hold Request** screen. Instead, a section named **Person Selection Criteria** appears in the **Hold Request** screen. This section enables you to specify the criteria for deriving persons using the person details.

On saving a hold request with the person selection criteria, the system does the following:

- Sets the **massHoldSw** field of the hold request to **Y**
- Sets the **HIERARCHY_SW** field corresponding to each hold entity of the hold request to **N**
- Creates the hold request in the **Entity Derivation Pending** status

Note: You cannot edit the person selection criteria when the hold request is in the **Entity Derivation Pending** status.

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However, while saving a hold request without the person selection criteria, the system does the following:

- Sets the **massHoldSw** field of the hold request to **N**
- Sets the **HIERARCHY_SW** field corresponding to each hold entity of the hold request to **Y** or **N** depending on whether the Hierarchy option is selected or not corresponding to the hold entity
- Creates the hold request in the **Draft** status

The **C1-HLDET** batch then checks whether there are any hold requests in the **Entity Derivation Pending** status. The system considers those hold requests whose start date is earlier than or equal to batch business date. If there is a hold request in the **Entity Derivation Pending** status, the batch derives the persons based on the criteria defined for the hold request. The derived persons are stored as the hold entities for the hold request in the **C1_HOLD_REQ_DTLS** table. The start date of all the hold entities is set to the system date and end date is set to null. Finally, the **massHoldSw** field of the hold request is set to**N** and the status of the hold request is changed from **Entity Derivation Pending** to **Draft**. For more information about the batch, see *Oracle Revenue Management and Billing Batch Guide*.

Once the status of the hold request is changed to **Draft**, you can modify the required details of the hold request expect the filter criteria. You can also set the **Hierarchy** option corresponding to the hold entity in the hold request. You can add more persons (if required) manually from the user interface. You can also edit or delete the persons derived through the filter criteria from the hold request. On activating a hold request created using a selection criterion, the start date of the hold request, hold entity, or hold process is not changed when it is earlier than the system date.

Note: If you select the **Hierarchy** option corresponding to the person, the system will hold the processes of the person, its immediate accounts, its child persons, and its child persons' accounts. The system will consider only the child persons and not the grandchild persons from the person's hierarchy. However, if you do not select the **Hierarchy** option corresponding to the person, the system will hold the processes of the person and its immediate accounts.

Related Topics

For more information on...	See...
How to define a person selection criteria	Defining a Person Selection Criteria for a Hold Request on page 1942

Hold Request (Without Approval) Status Transition

The following figure graphically indicates how a hold request moves from one status to another when the approval process is not configured in the hold request type:

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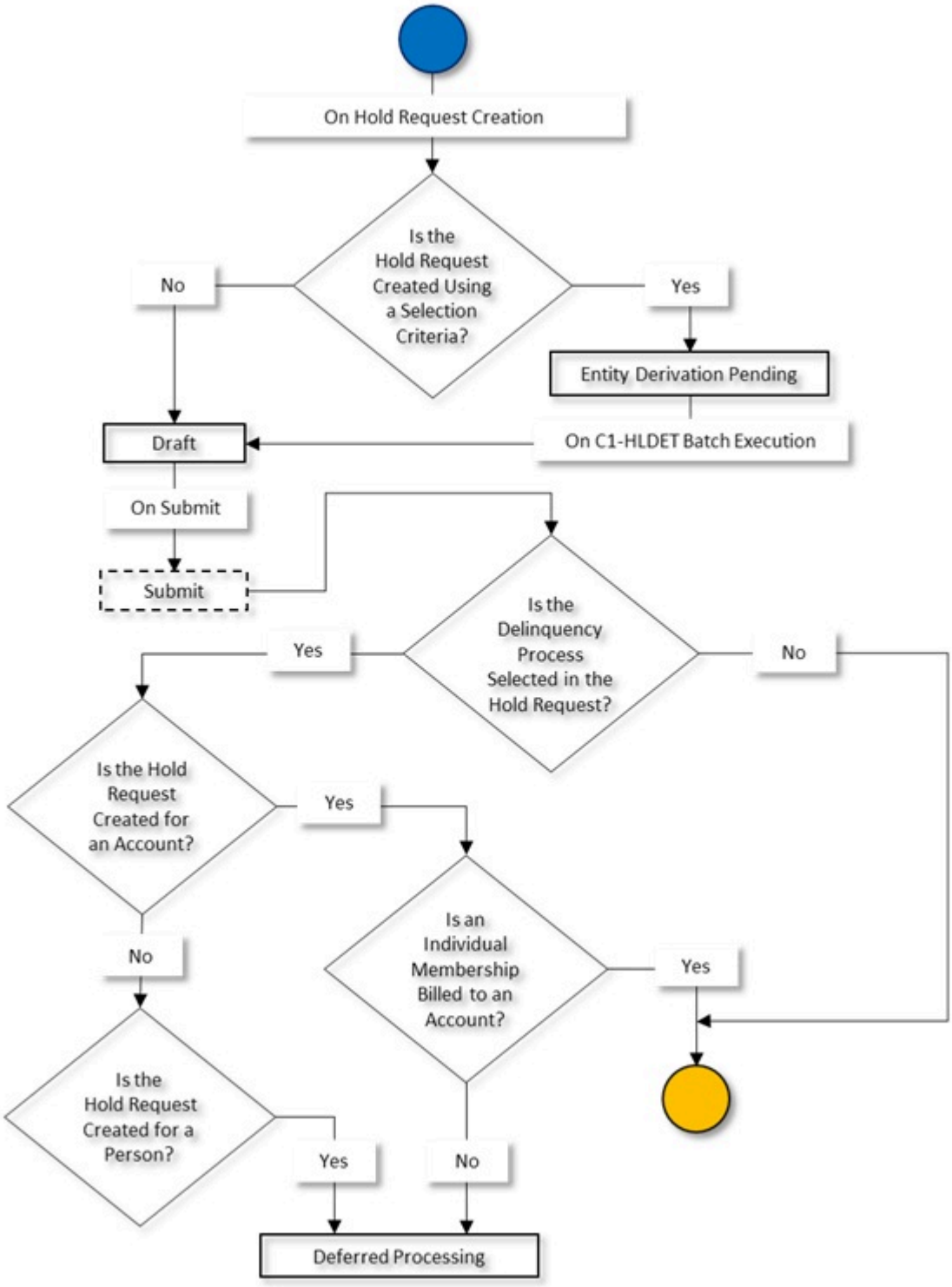

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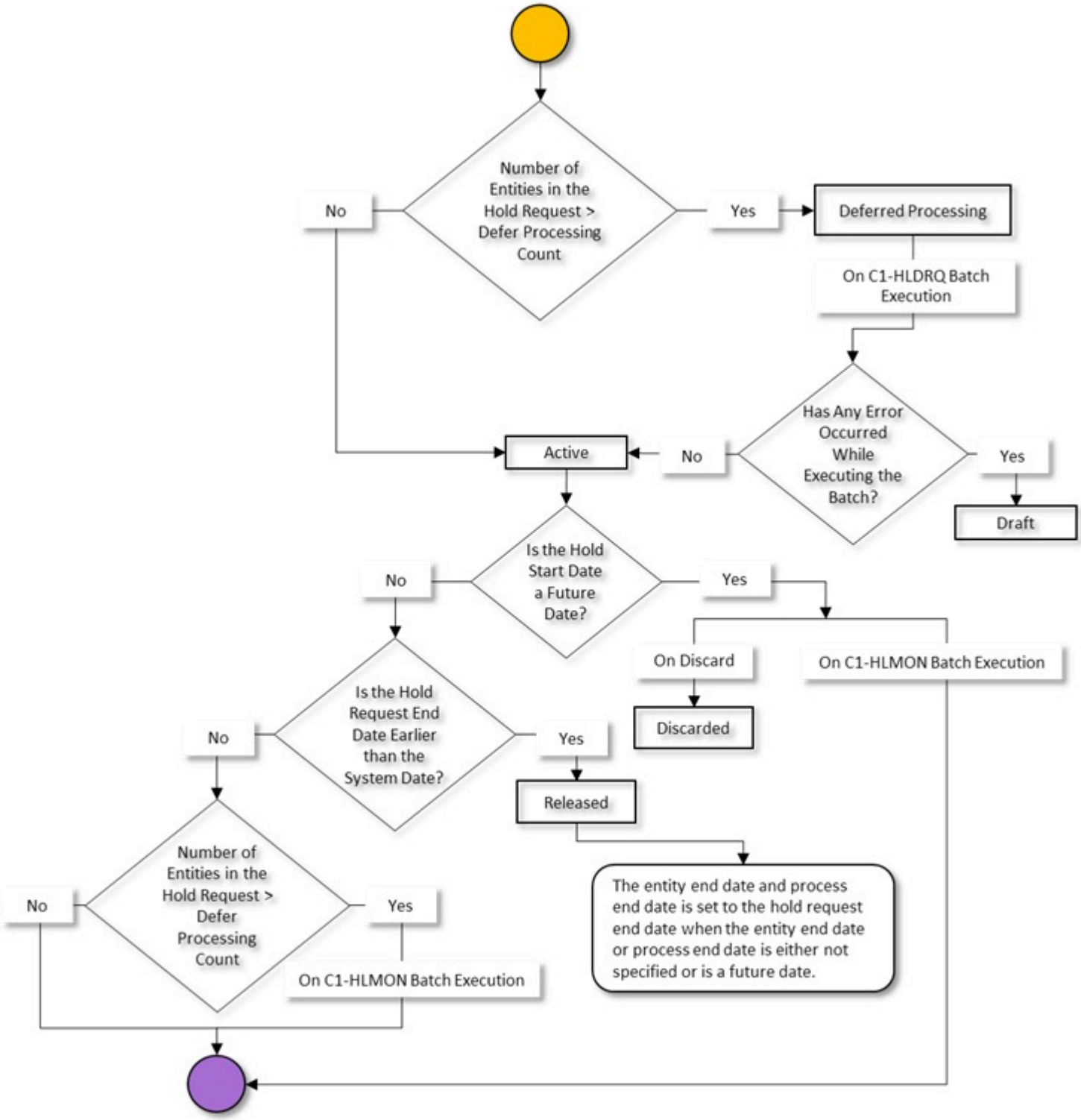

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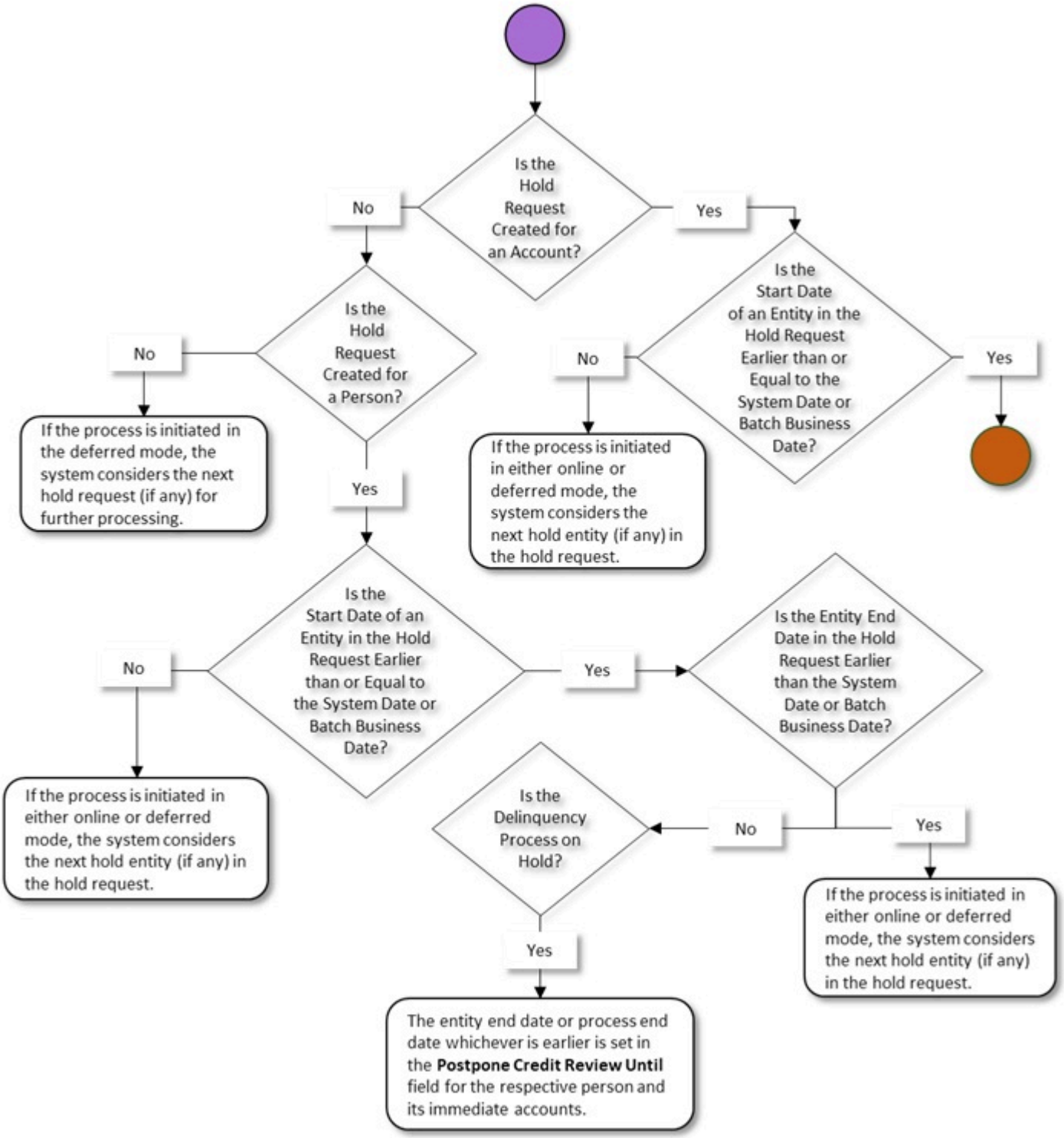

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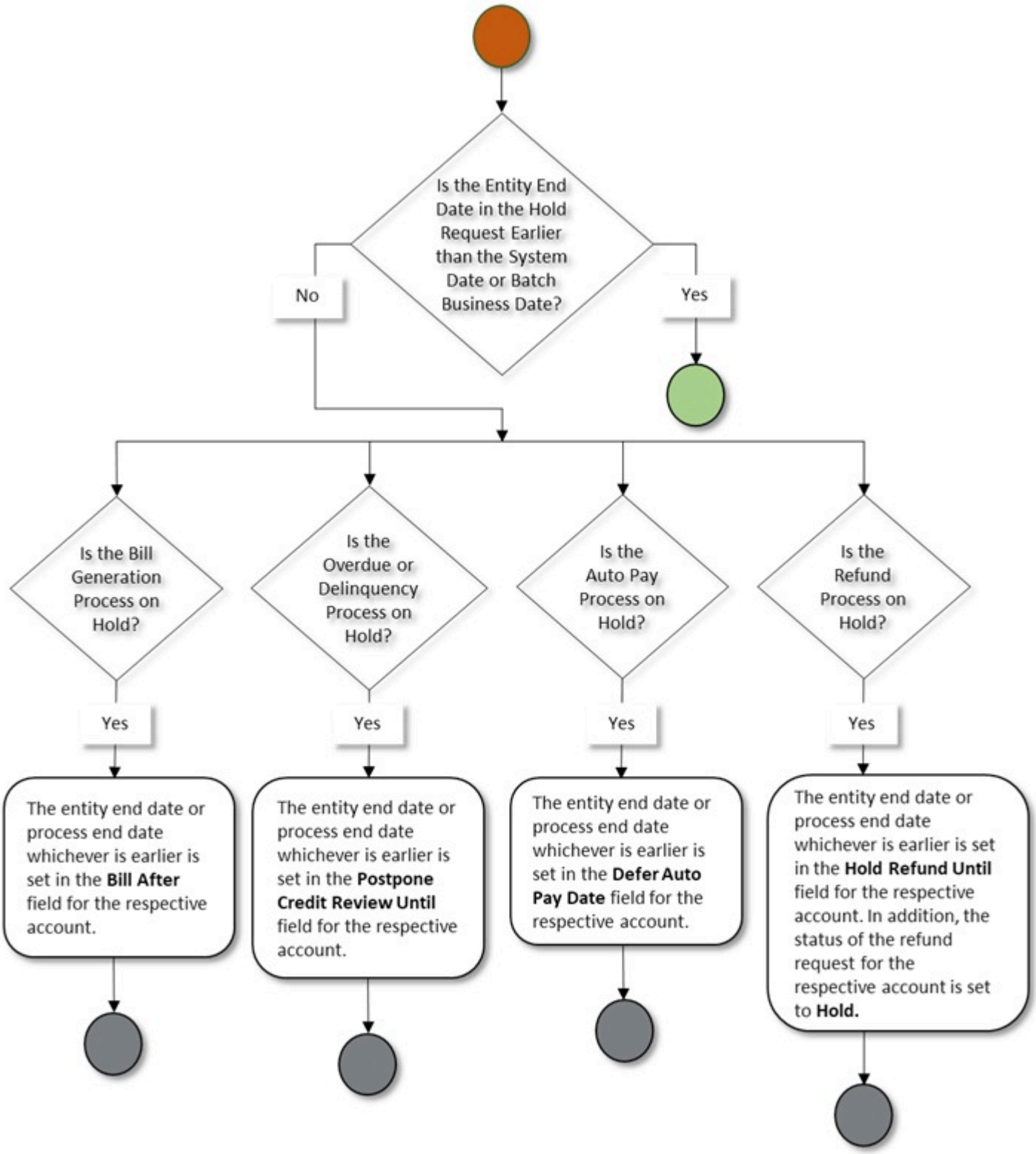

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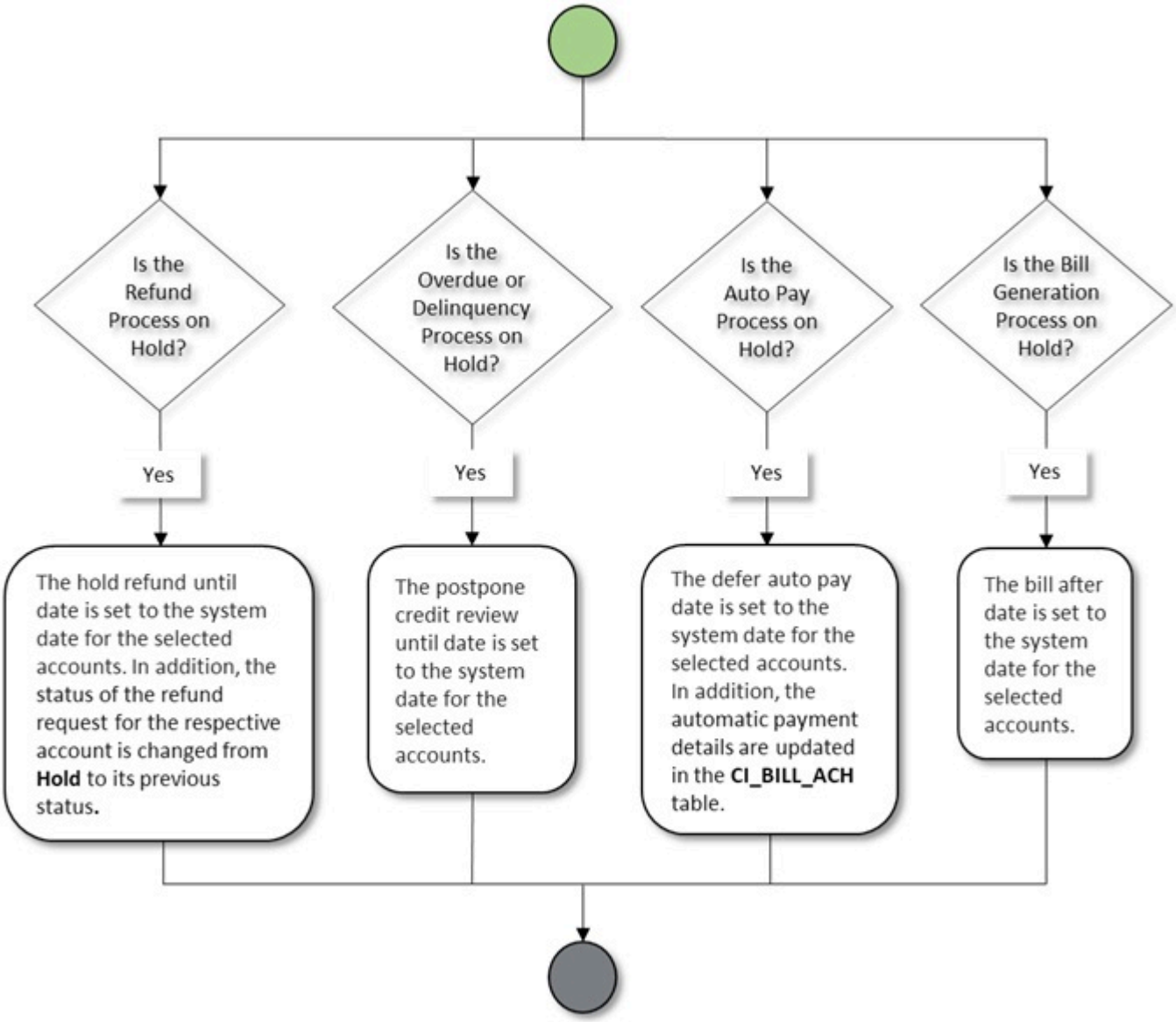

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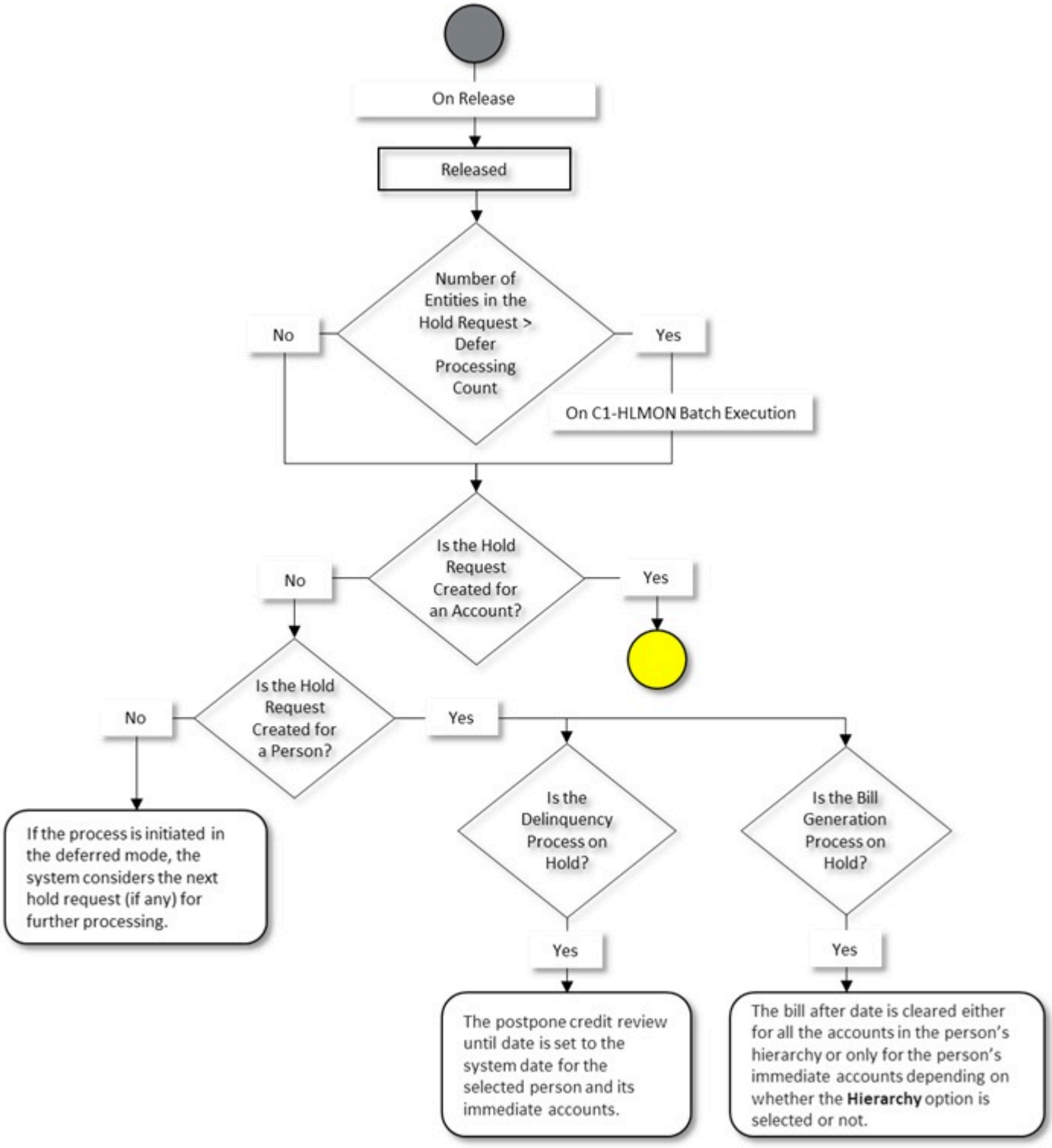

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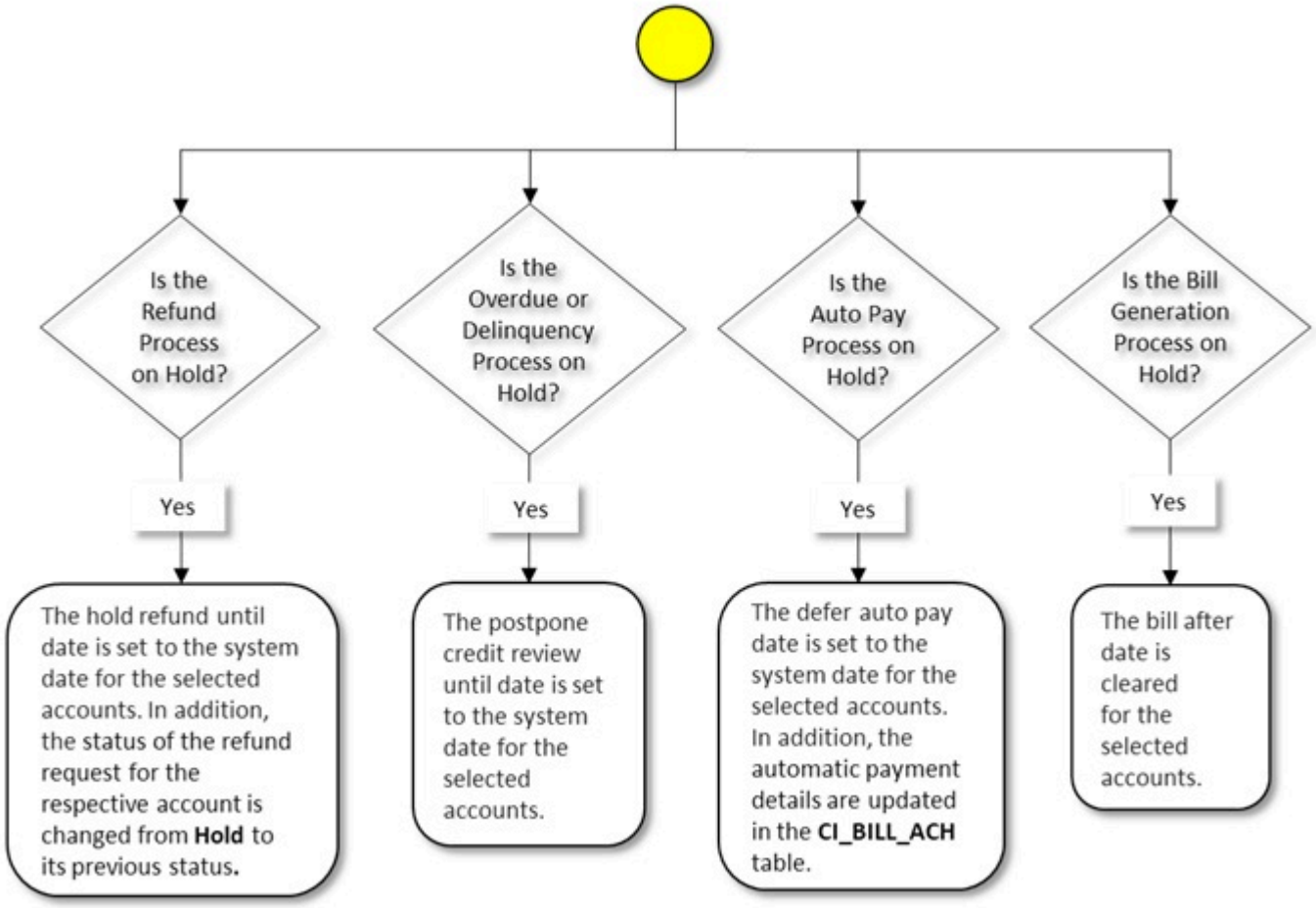

Hold Request (With Approval) Status Transition

The following figure graphically indicates how a hold request moves from one status to another when the approval process is configured in the hold request type:

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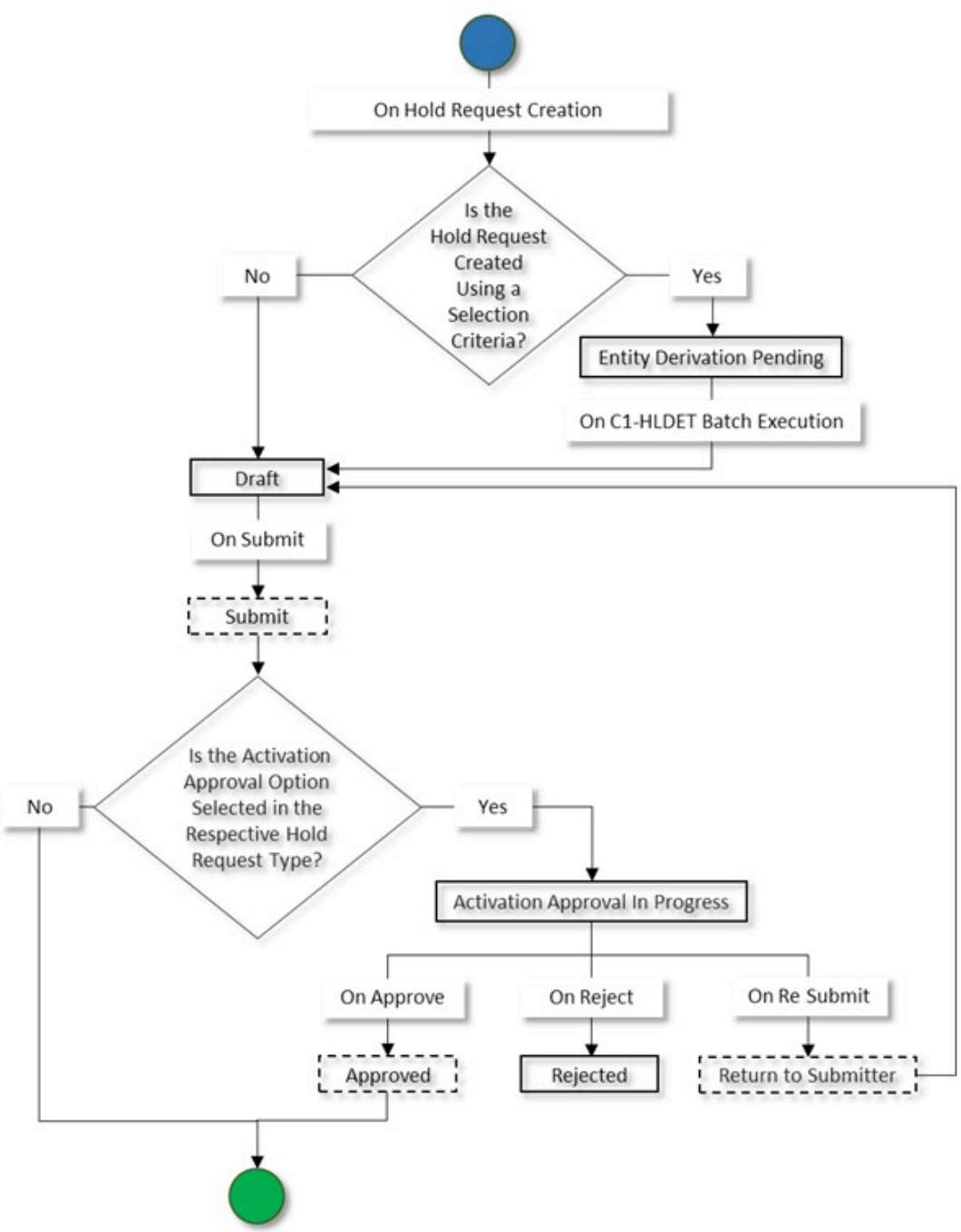

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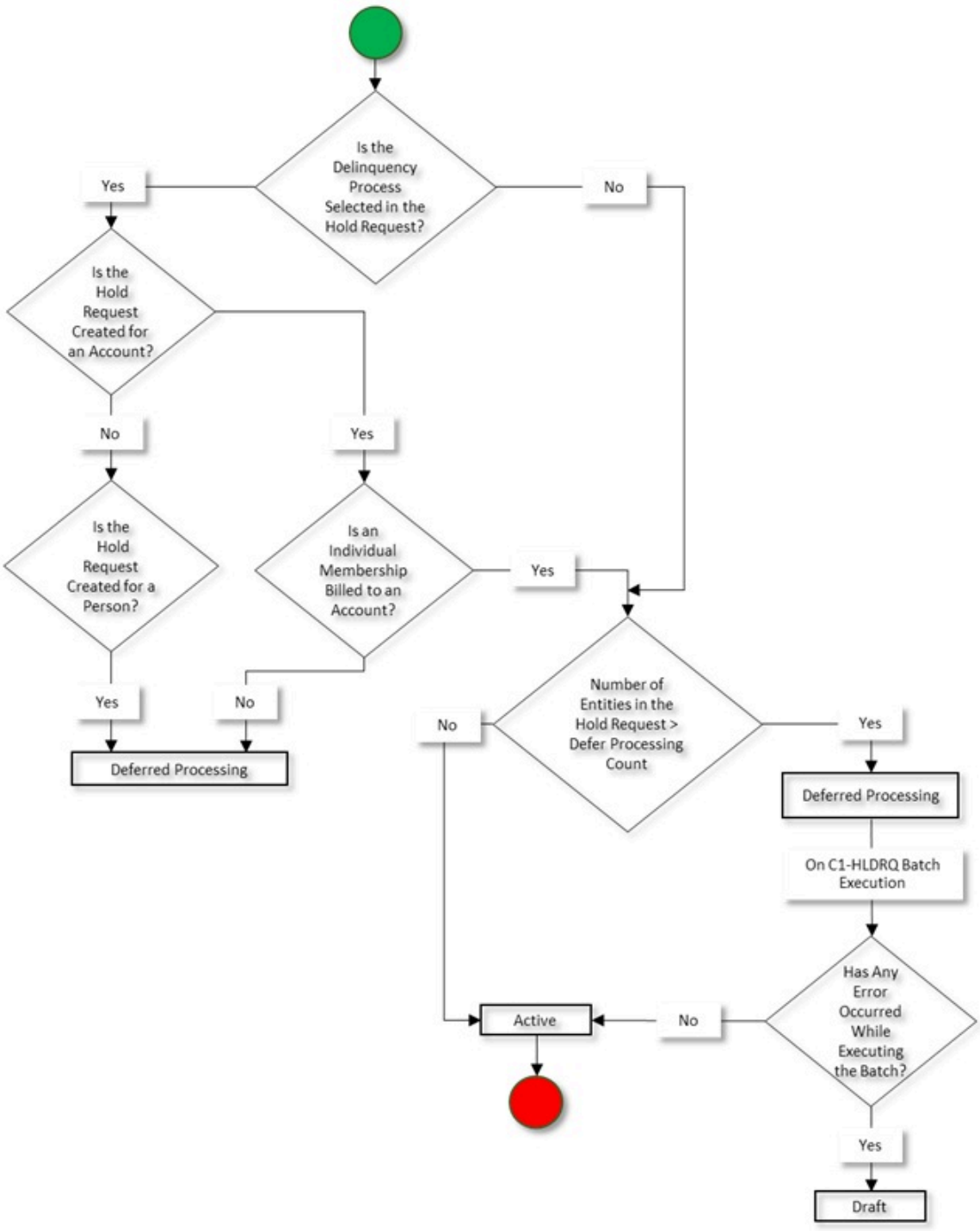

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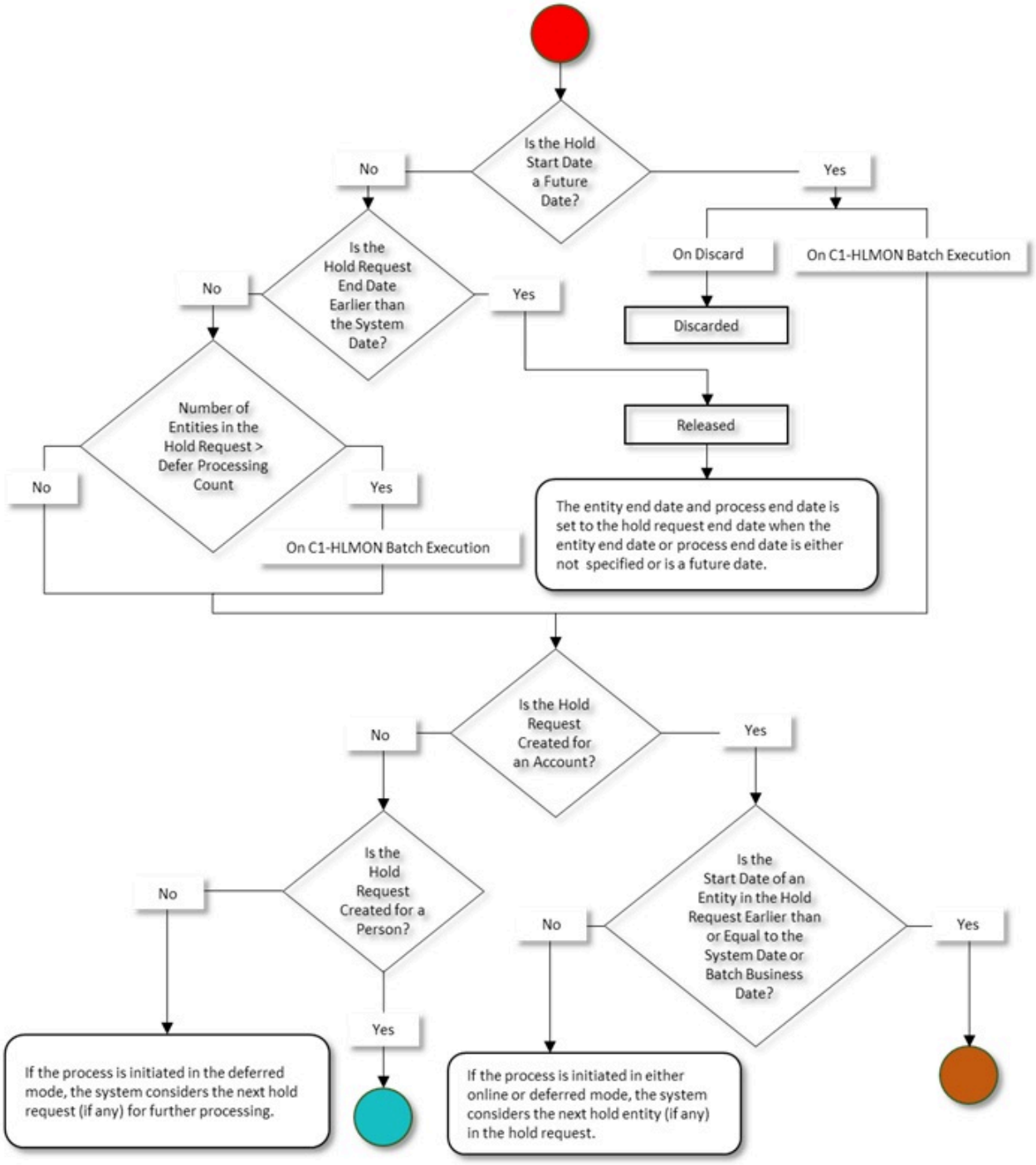

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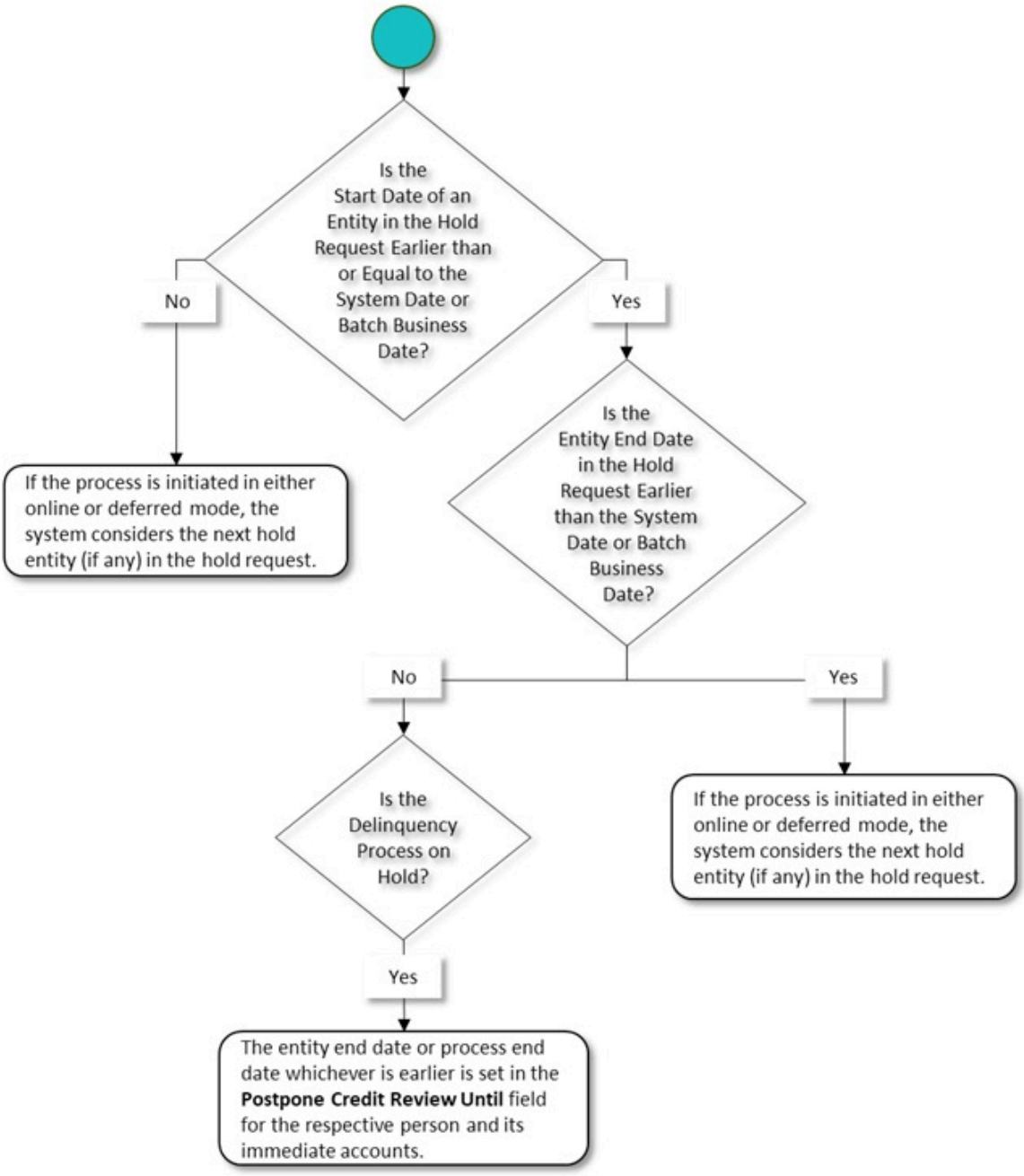

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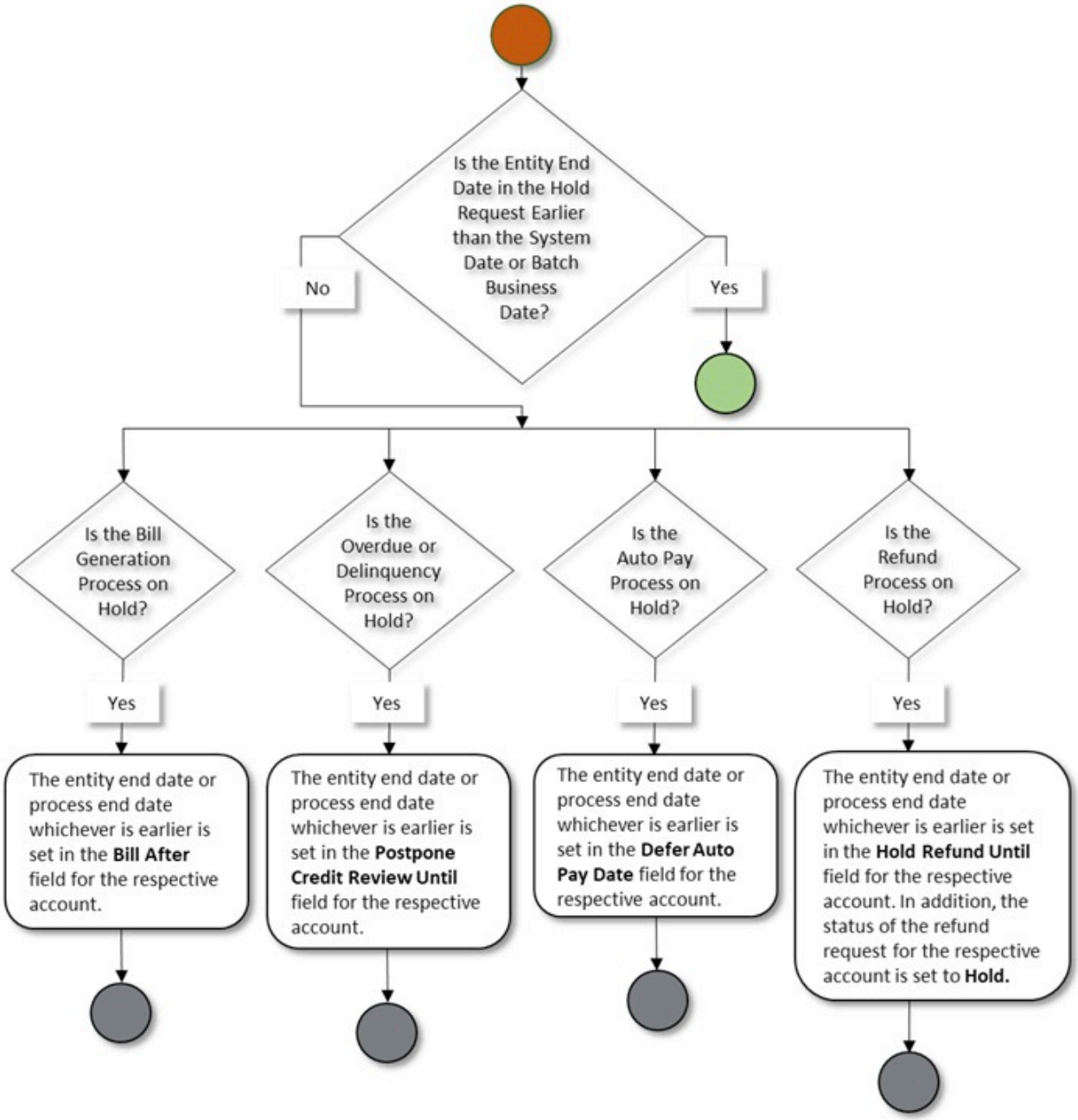

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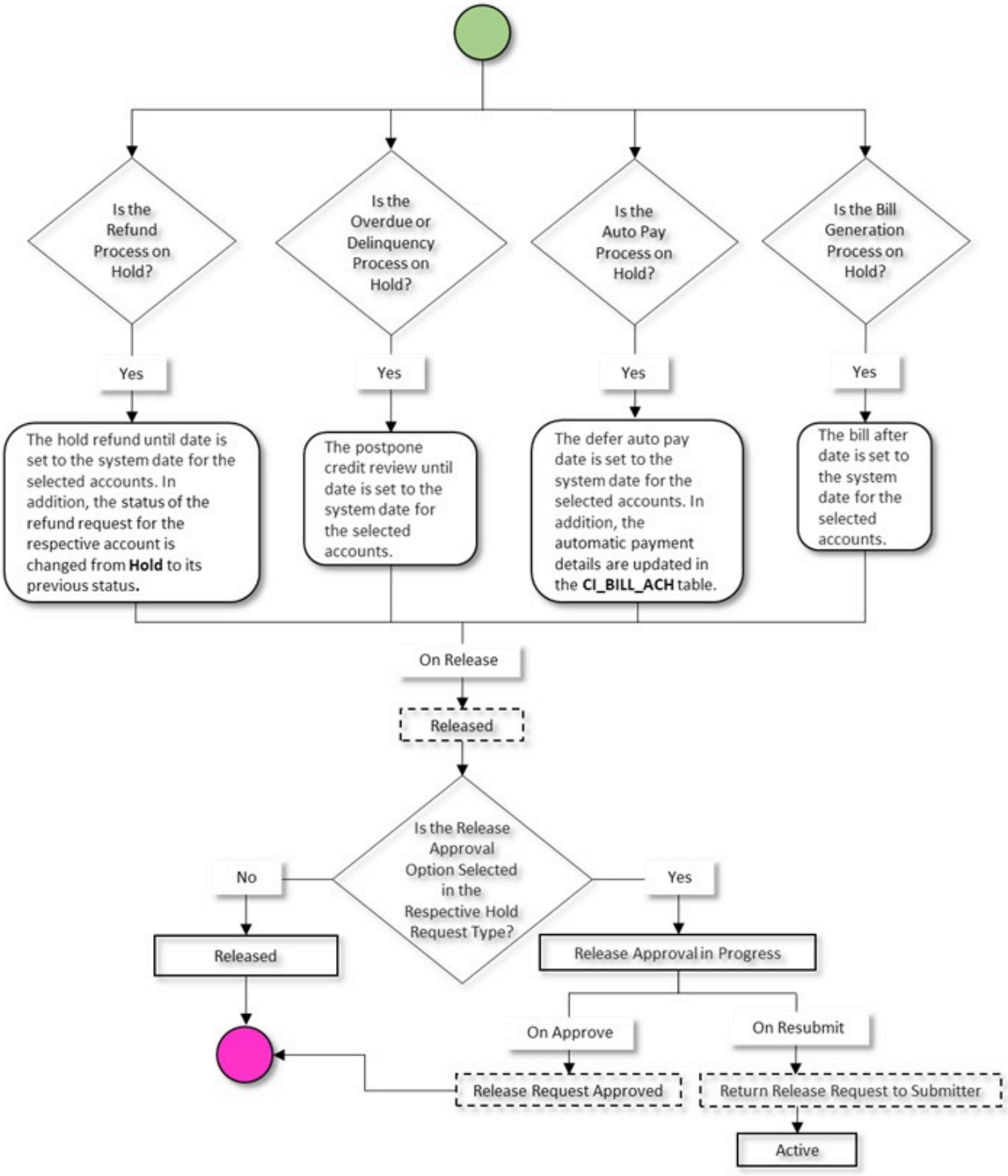

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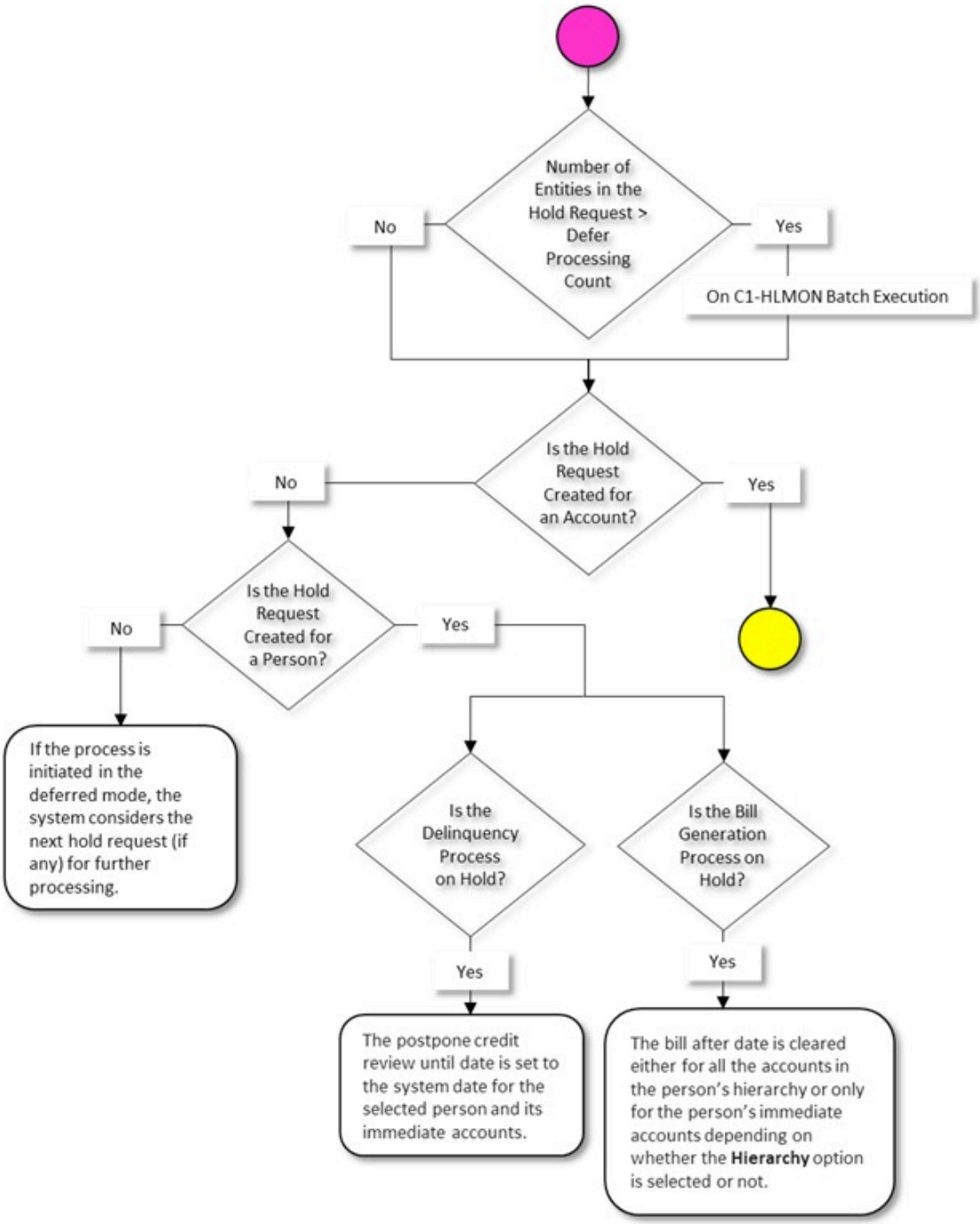

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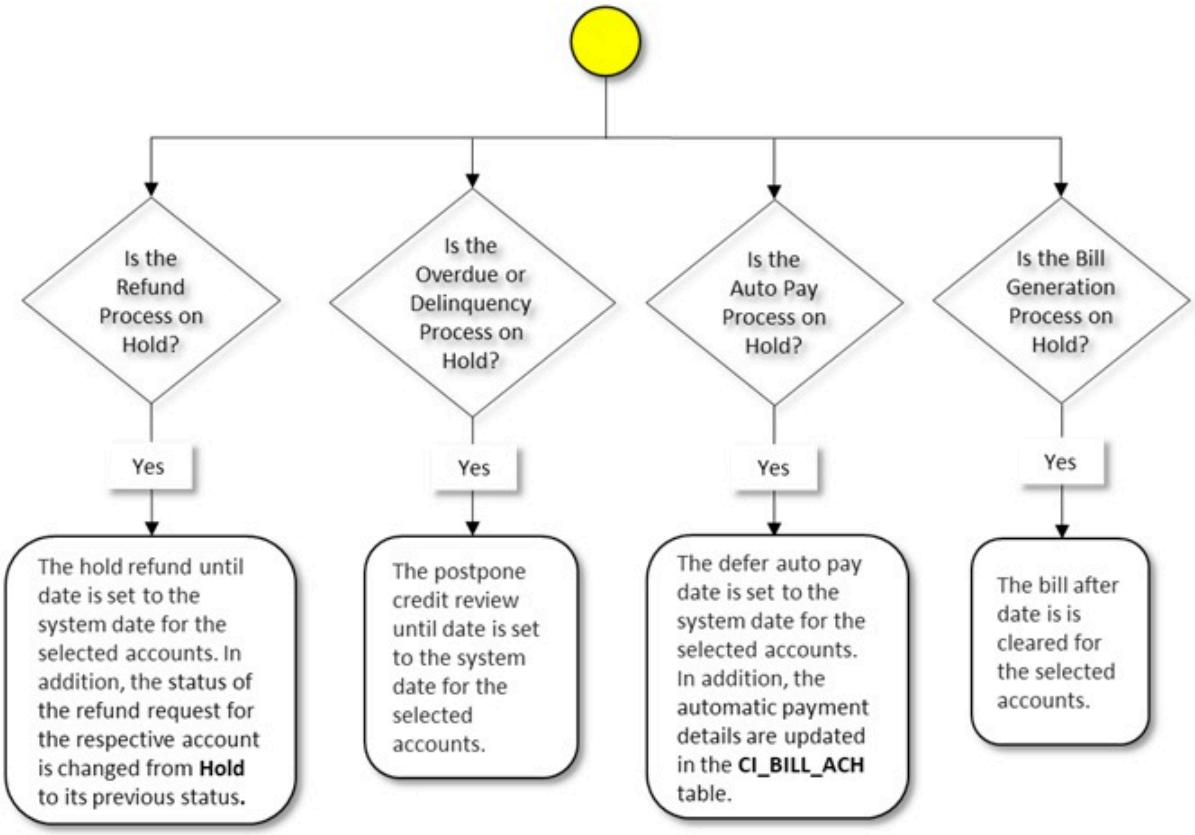

Setting the C1-HOLDSRCH Feature Configuration

The **C1-HOLDSRCH** feature configuration enables you to set certain feature-specific options which are used while creating or viewing a hold request in the system.

Prerequisites

To set the **C1-HOLDSRCH** feature configuration, you should have:

- Foreign key references defined for different entities, such as person, account, and bill
- Required hold request types defined in the application

Procedure

To set the **C1-HOLDSRCH** feature configuration:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **F** and then click **Feature Configuration**.
   A sub-menu appears.
3. Click the **Search** option from the **Feature Configuration** sub-menu.
   The **Feature Configuration Query** screen appears.
4. In the **Feature Configuration Search** zone, enter **C1-HOLDSRCH** in the **Feature Name** field.

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Note: ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.

5. Click **Search**.
   A list of feature configurations that meet the search criteria appears in the search results.
6. In the **Search Results** section, click the link in the **Description** column corresponding to the feature configuration whose details you want to edit.

   The **Feature Configuration** screen appears. It contains the following option types:

Option Type	Description	Mandatory (Yes or No)
Account FK Ref	Used to indicate the foreign key reference for account. The system then generates information string for the account using the specified foreign key reference and accordingly displays it in the **Hold Request** screen. **Note:** You must specify a foreign key reference which is already defined in the system. The **ACCT** foreign key reference for account is shipped with the product. You can also use a custom foreign key reference, if required.	Yes
Bill FK Ref	Used to indicate the foreign key reference for bill. The system then generates information string for the bill using the specified foreign key reference and accordingly displays it in the **Hold Request** screen. **Note:** You must specify a foreign key reference which is already defined in the system. The **C1-BILL** foreign key reference for bill is shipped with the product. You can also use a custom foreign key reference, if required.	Yes
Default Hold Request Type for IWS	Used to indicate the hold request type using which you want to create a hold request through an inbound web service. The system uses the specified hold request type when it is not received in the inbound request. **Note:** You must specify a hold request type which is already defined in the system. Here, you must specify an active hold request type where the approval process is not configured for activation and release.	Yes
Funding Exclusion Reason	Used to indicate the reason why the bill record was excluded from the funding request. The system stamps this reason	Yes

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Option Type	Description	Mandatory (Yes or No)
	corresponding to the bill record when you create a hold request for a bill via the **Funding Request** screen.	
Person FK Ref	Used to indicate the foreign key reference for person. The system then generates information string for the person using the specified foreign key reference and accordingly displays it in the **Hold Request** screen. **Note:** You must specify a foreign key reference which is already defined in the system. The **PERS** foreign key reference for person is shipped with the product. You can also use a custom foreign key reference, if required.	Yes

7. Enter the values for the required option types in the **Feature Configuration** screen.
8. Click the **Save** button in the **Page Title** area.
   The changes made to the feature configuration are saved.

Setting the SYSDT Feature Configuration

The **SYSDT** feature configuration enables you to set certain environment options which will be used across features in the application.

Procedure

To set the **SYSDT** feature configuration:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **F** and then click **Feature Configuration**.
   A sub-menu appears.
3. Click the **Search** option from the **Feature Configuration** sub-menu.
   The **Feature Configuration Query** screen appears.
4. In the **Feature Configuration Search** zone, enter **SYSDT** in the **Feature Name** field.

> **Note:** ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.

5. Click **Search**.
   A list of feature configurations that meet the search criteria appears in the search results.
6. In the **Search Results** section, click the link in the **Description** column corresponding to the feature configuration whose details you want to edit.

   The **Feature Configuration** screen appears. It contains the following option types:

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Option Type	Description	Mandatory (Yes or No)
Environment Type	Used to indicate whether the environment will be used for the financial services or health insurance domain. The valid values are: • **B** - Used when you want to use the environment for the financial services domain. • **H** - Used when you want to use the environment for the health insurance domain.	Yes
Maximum Attachment Size	Used to specify the maximum size limit for a file that can be uploaded in the system. The size is interpreted in megabytes (MB). For example, if you want to set the maximum size limit of a file to 5 MB, then specify the value as 5 in this option type. **Note:** You must specify a value greater than zero. If you do not specify any value for this option type, the system would not enforce any limit while uploading a file in the system.	No
System Override Date	Used when you want to override the system date. The system will then use the specified date as the system date instead of retrieving the system date from the database. **Note:** You must specify the date in the YYYY-MM-DD format. This option type is valid only when an appropriate system property is set. It provides a way to override the system date for online operations of all the users in the region. See the online help (search for 'System Override Date') for more information about the system property and how to override the system date at the user level rather than at the system level.	No

7. Enter the values for the required option types in the **Feature Configuration** screen.
8. Click the **Save** button in the **Page Title** area.
   The changes made to the feature configuration are saved.

Algorithms Used in C1-HoldRequest

The following table lists the algorithms which are attached to the **C1-HoldRequest** business object:

System Event	Algorithm	Algorithm Type	Description
Information	C1-HOLD-INF	C1-HOLD-INF	Refer to C1-HOLD-INF on page 1892.
Validation	C1-HLDVALDN	C1-HLDVALDN	Refer to C1-HLDVALDN on page 1893.

The following table lists the algorithms which are used in the lifecycle of the **C1-HoldRequest** business object:

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Status	System Event	Algorithm	Algorithm Type	Description
Draft	Enter	C1-HLDARCTRN	C1-HLDARCTRN	Refer to C1-HLDARCTRN on page 1893.
	Enter	C1-CKMSHLD	C1-CKMSHLD	Refer to C1-CKMSHLD on page 1894.
	Exit	F1-TODOCOMPL	F1-TODOCOMPL	Refer to F1-TODOCOMPL on page 1469.
Entity Derivation Pending	Monitor	C1-MASSHOLD	C1-MASSHOLD	Refer to C1-MASSHOLD on page 1894.
Submit	Enter	C1-HOLDSUBMT	C1-HOLDSUBMT	Refer to C1-HOLDSUBMT on page 1894.
Deferred Processing	Monitor	F1-AT-RQJ	F1-GEN-BOMNJ	Refer to F1-AT-RQJ on page 225.
Activation Approval In Progress	Enter	C1-HOLDAPP	C1-HOLDAPP	Refer to C1-HOLDAPP on page 1895.
	Exit	F1-TODOCOMPL	F1-TODOCOMPL	Refer to F1-TODOCOMPL on page 1469.
Approved	Enter	C1-HOLDAPRVD	C1-HOLDAPRVD	Refer to C1-HOLDAPRVD on page 1895.
Return to Submitter	Enter	C1-HLDRESUBM	C1-HLDRESUBM	Refer to C1-HLDRESUBM on page 1896.
Rejected	-	-	-	-
Active	Enter	C1-HOLDACTV	C1-HOLDACTV	Refer to C1-HOLDACTV on page 1896.
Release Approval in Progress	Enter	C1-RELAPP	C1-RELAPP	Refer to C1-RELAPP on page 1897.
	Exit	F1-TODOCOMPL	F1-TODOCOMPL	Refer to F1-TODOCOMPL on page 1469.
Release Request Approved	Enter	C1-HRQ-TRANS	C1-HRQ-TRANS	Refer to C1-HRQ-TRANS on page 1898.
Return Release Request to Submitter	Enter	C1-RELRESUBM	C1-RELRESUBM	Refer to C1-RELRESUBM on page 1898.
Released	Enter	C1-RELENTITY	C1-RELENTITY	Refer to C1-RELENTITY on page 1898.
	Enter	C1-RLSHOLD	C1-RLSHOLD	Refer to C1-RLSHOLD on page 1899.
Discarded	-	-	-	-

C1-HOLD-INF

This algorithm generates the hold request information string which appears throughout the application. It concatenates the following fields separated by a comma in the specified order:

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1. Hold Request Type Description
2. Entity Level (i.e., Person, Account, or Bill)
3. Hold Request Status Description
4. Hold Request ID

C1-HLDVALDN

This algorithm validates the following while creating or editing a hold request:

- At least one process is selected for the hold request.

  Note: Entity selection is optional.

- No duplicate entity and process are selected for the hold request.
- The same entity is not kept on hold with the same hold reason in multiple hold requests.
- The hold request end date is specified.
- The process start date is not earlier than the hold request start date.
- The entity start date is not earlier than the hold request start date.
- The process end date is not later than to the hold request end date.
- The entity end date is not later than the hold request end date.
- At least one process start date is earlier than or equal to the entity start date.
- At least one process end date is later than or equal to the entity end date.
- The **Overdue**, **Auto Pay**, and **Refund** processes are not selected when the entity level is set to **Person**.
- The **Bill Generation**, **Overdue**, **Auto Pay**, **Refund**, and **Delinquency** processes are not selected when the entity level is set to **Bill**.
- Both **Overdue** and **Delinquency** processes are not selected at a time in the hold request.

  Note: The **Overdue** process is valid for the financial services and health insurance domains but the **Delinquency** process is valid only for the health insurance domain.

- A bill with non-zero outstanding bill amount is added in the hold request.
- Each entity's start and end dates should fall within at least one process's start and end dates.
- The hold amount is less than or equal to the outstanding amount when the entity level is set to **Bill**.

In addition, this algorithm validates the following when changes are made to an active hold request:

- An existing process or entity is not deleted from the hold request.
- Any process details other than the end date is not modified in the hold request.
- The start date of the hold request, hold entity, or hold process is not modified in the hold request.
- The hold reason in the hold request is not modified.
- The end date of the hold request, hold entity, or hold process is not set to the date which is earlier than the system date.
- A new process is added with the start date later than or equal to the system date.
- A new entity is not added to an active hold request.
- A past end date of an entity or process is not changed in the hold request.

C1-HLDARCTRN

This algorithm is invoked when you create a hold request. If the hold request is created through the **Account Receivable Central** or **Delinquency Central** screen or through an inbound web service, it changes the status of the hold request to **Active**. However, if the hold request is created through the **Hold Request** screen, it changes the status of the hold request to **Draft**.

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C1-CKMSHLD

This algorithm is invoked when the hold request is created in the **Draft** status. If the **massHoldSw** field is set to **Y** for the hold request, this algorithm changes the status of the hold request from **Draft** to **Entity Derivation Pending**.

Note: The system sets the **massHoldSw** field to **Y** when the **Use Selection Criteria** option is selected while creating a hold request.

F1-TODOCOMPL

This algorithm completes the To Do entries that are linked to an object when the object exits the given status. It finds and completes all open To Do entries where the business object's primary key is defined as a drill key. However, if the **Exclude To Do Entries From Auto Completion** (**F1-EXLTD**) characteristic is set to **Y** for a To Do type, the system does not automatically complete the respective To Do entry.

This algorithm contains the following parameter:

- **'Do Not Complete To Do Type' Char Type** – Used to specify the characteristic type that indicates whether the To Do entries should be automatically completed or not.

Note: The **F1-EXLTD** characteristic type is shipped with the product. You can either use the **F1-EXLTD** characteristic type or a custom characteristic type, if required. Note that you must specify a predefined characteristic type where the characteristic entity is set to **To Do Type** and the predefined values are set to **Y** or **N**.

C1-MASSHOLD

This algorithm is invoked when the **C1-HLDET** batch is executed. If the **massHoldSw** field is set to **Y** for the hold request, this algorithm derives the filter criteria specified in the hold request. It then creates a dynamic SQL query to fetch the list of accounts or persons that meets the filter criteria depending on whether the entity level is set to **Account** or **Person**. The derived accounts or persons are then stored as the hold entities for the hold request in the **C1_HOLD_REQ_DTLS** table. This algorithm sets the start date of all the hold entities to the system date and end date to null. Once the hold request is updated, it then sets the **massHoldSw** field of the hold request to **N** and changes the status of the hold request from **Entity Derivation Pending** to **Draft**.

Note:

The system sets the **massHoldSw** field to **Y** when the **Use Selection Criteria** option is selected while creating a hold request.

The filters are stored in the XML format in the **BO_DATA_AREA** column of the **C1_HOLD_REQ** table. If the entity level is set to **Person**, the filter values are stored within the <personFilter> and </personFilter> tags. However, if the entity level is set to **Account**, the filter values are stored within the <acctFilter> and </acctFilter>, <policyFilter> and </policyFilter>, <personFilter> and </personFilter>, or <indMembershipFilter> and </indMembershipFilter> tags, respectively, depending on the search option used in the hold request.

Once the status of the hold request is changed to **Draft**, you can modify the required details of the hold request expect the filter criteria. You can add more accounts (if required) manually from the user interface. You can also edit or delete the accounts derived through the filter criteria from the hold request.

C1-HOLDSUBMT

This algorithm is invoked when you click the **Submit** button. It checks whether the **Activation Approval** option is selected in the respective hold request type. If the **Activation Approval** option is selected in the respective hold request type, it changes the status of the hold request to **Activation Approval In Progress**. However, if the **Activation Approval**

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option is not selected in the respective hold request type, it checks whether the number of entities added (either manually or via filter criteria) in the hold request exceeds the defer processing count. If the number of entities added in the hold request does not exceed the defer processing count, this algorithm changes the status of the hold request to **Active**. Note that the system does not allow you to activate a hold request when the hold request end date is earlier than the system date. However, if the number of entities added in the hold request exceeds the defer processing count, this algorithm changes the status of the hold request to **Deferred Processing**.

In addition, it displays a warning message while activating the hold request if the start date of hold request, hold process, or hold entity is earlier than the system date.

Note that if the **Delinquency** process is added in the hold request, this algorithm derives the entity level of the hold request. If the entity level is set to **Account**, it checks whether any individual or group membership is billed to the account. If an individual membership is billed to the account, it determines whether the number of entities in the hold request exceeds the defer processing count and accordingly changes the status of the hold request to either **Deferred Processing** or **Active**. However, if a group membership is billed to the account, this algorithm does not use the defer processing count. It directly changes the status of the hold request to **Deferred Processing**. Similarly, if the entity level is set to **Person**, it does not use the defer processing count. It directly changes the status of the hold request to **Deferred Processing**.

F1-AT-RQJ

This algorithm transitions the current status of the business object to the specified status. It contains the following parameters:

- **Next Status** – Used when you want to override the default next status specified in the lifecycle.
- **Next Transition Condition** – Used when you want to override the default next transition condition specified in the lifecycle.

At a time, you can specify value for either the **Next Status** or **Next Transition Condition** parameter. If you don't specify any value for these parameters, the system will transition the business object to the default next status specified in its lifecycle.

C1-HOLDAPP

This algorithm is invoked when the status of the hold request is changed to **Activation Approval In Progress**. It creates a To Do using the activation approval To Do type that is specified in the respective hold request type. Once a To Do is created, it is assigned to all the users with the activation approval To Do role that is specified in the respective hold request type. In addition, it creates a log entry for the hold request when the To Do is created for the approver.

C1-HOLDAPRVD

This algorithm is invoked when you click the **Approve** button. It checks whether the number of entities added (either manually or via filter criteria) in the hold request exceeds the defer processing count. If the number of entities added in the hold request does not exceed the defer processing count, this algorithm changes the status of the hold request to **Active**. In addition, it changes the start date of the hold request, hold entities, and the hold processes to the system date. Note that the system does not allow you to activate a hold request when the hold request end date is earlier than the system date. However, if the number of entities added in the hold request exceeds the defer processing count, this algorithm changes the status of the hold request to **Deferred Processing**.

Note that if the **Delinquency** process is added in the hold request, this algorithm derives the entity level of the hold request. If the entity level is set to **Account**, it checks whether any individual or group membership is billed to the account. If an individual membership is billed to the account, it determines whether the number of entities in the hold request exceeds the defer processing count and accordingly changes the status of the hold request to either **Deferred Processing** or **Active**. However, if a group membership is billed to the account, this algorithm does not use the defer processing count. It directly changes the status of the hold request to **Deferred Processing**. Similarly, if the entity level

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is set to **Person**, it does not use the defer processing count. It directly changes the status of the hold request to **Deferred Processing**.

C1-HLDRESUBM

This algorithm is invoked when you click the **Re Submit** button. It changes the status of the hold request to **Draft**. The submitter can then make the required changes and resubmit the hold activation request for approval.

In addition, it creates a To Do using the submitter To Do type that is specified in the respective hold request type. Once a To Do is created, it is assigned to all the users with the submitter To Do role that is specified in the respective hold request type. Note that the To Do is created for the submitter only when the submitter To Do type and submitter To Do role are specified in the respective hold request type. It also creates a log entry for the hold request when the To Do is created for the submitter.

Note:

While requesting a submitter to resubmit a hold activation request, the approver needs to specify the comments so that the submitter can make the required changes in the hold request.

The **Re Submit** button is not available to the approver when the hold request is created through the **Upload Request** feature or through an inbound web service.

C1-HOLDACTV

This algorithm is invoked when the status of the hold request is changed to **Active**. It validates the following on activation:

- The entity start date is not earlier than the hold request start date.
- The entity end date is not later than the hold request end date.
- The hold amount is less than or equal to the outstanding amount when the entity level is set to **Bill**.
- A bill with non-zero outstanding bill amount is added in the hold request.
- The entity end date or process end date is not earlier than the system date.

It also does the following (in the online mode):

- If the start date of the hold request, hold entity, or hold process is earlier than the system date, it sets the respective start date to the system date.
- If an active overdue process (if any) exists for the account which is kept on hold, it cancels the respective overdue process of the account. The status of the overdue process is changed to **Inactive**.

In addition, it does the following in the online or deferred (i.e., when the **C1-HLDRQ** or **C1-HLMON** batch is executed) mode depending on the defer processing count:

- If the hold request is created for the **Account** entity, the **Bill Generation** process is on hold, and the entity start date in the hold request is earlier than or equal to the system date or batch business date, it sets the bill after date to the hold entity end date or bill generation process end date whichever is earlier. In addition, it creates an entry for the hold request in the **CI_BILL_DEL_REQUEST** table.
- If the hold request is created for the **Account** entity, the **Overdue** process is on hold, and the entity start date in the hold request is earlier than or equal to the system date or batch business date, it sets the postpone credit review until date to the hold entity end date or overdue process end date whichever is earlier.
- If the hold request is created for the **Account** entity, the **Delinquency** process is on hold, and the entity start date in the hold request is earlier than or equal to the system date or batch business date, it sets the postpone credit review until date to the hold entity end date or delinquency process end date whichever is earlier.
- If the hold request is created for the **Person** entity, the **Delinquency** process is on hold, and the entity start date in the hold request is earlier than or equal to the batch business date, it sets the postpone credit review until date to the hold entity end date or delinquency process end date whichever is earlier. If the **Hierarchy** option is selected

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for the person, this algorithm sets the postpone credit review until date for the person, its immediate accounts, its child persons, and for the child persons' accounts. Note that the system considers only the child persons and not the grandchild persons from the person's hierarchy and then derives the accounts where the child person is the main customer. However, if the **Hierarchy** option is not selected for the person, this algorithm sets the postpone credit review until date for the person and its immediate accounts (where the person is the main customer).

Note: This happens only in the deferred mode when the **C1-HLDRQ** or **C1-HLMON** batch is executed.) For more information, see Hold Delinquency on page 1858.

- If the hold request is created for the **Person** entity, the **Bill Generation** process is on hold, and the entity start date in the hold request is earlier than or equal to the batch business date, it sets the bill after date to the hold entity end date or bill generation process end date whichever is earlier. The bill after date is set either for all the accounts in the person's hierarchy or only for the persons' immediate accounts depending on whether the **Hierarchy** option is selected or not. Note that the system considers only the child persons and not the grandchild persons from the person's hierarchy and then derives the accounts where the child person is the main customer.

  Note: This happens only in the deferred mode when the **C1-HLDRQ** or **C1-HLMON** batch is executed.) In addition, it creates an entry for the hold request in the **CI_BILL_DEL_REQUEST** table.
- If the hold request is created for the **Account** entity, the **Auto Pay** process is on hold, and the entity start date in the hold request is earlier than or equal to the system date or batch business date, it sets the defer auto pay date to the hold entity end date or auto pay process end date whichever is earlier.
- If the hold request is created for the **Account** entity, the **Auto Pay** process is on hold, and the entity end date in the hold request is earlier than or equal to the system date or batch business date, it updates the automatic payment details of the debit bills (if any) for the respective account in the **CI_BILL_ACH** table.
- If the hold request is created for the **Account** entity, the **Refund** process is on hold, and the entity start date in the hold request is earlier than or equal to the system date or batch business date, it sets the hold refund until date to the hold entity end date or refund process end date whichever is earlier. In addition, the status of the non-final refund request (if any) for the respective account is set to **Hold**.

Note:

If the hold entity end date is not specified, the system will consider the respective process end date while deriving the above dates. If both the hold entity end date and respective process end date are not specified, the system will consider the hold request end date while deriving the above dates.

This algorithm does not change the start date of the hold request, hold entity, or hold process when it is a future date.

This algorithm contains the following parameter:

- **Alert Type** – Used to indicate the alert type using which the alerts should be created in the dashboard whenever an account is kept on hold. You can then click on the hyperlink and navigate to the **Alerts** tab of the **Account** screen. Note that the start and end dates of the alert is set to the hold request start and end dates, respectively. The alert appears until the hold request for the account is released. This parameter is optional.

  Note: You need to specify the same alert type in both the **C1-HOLDACTV** and **C1-RELENTITY** algorithms.

C1-RELAPP

This algorithm is invoked when the status of the hold request is changed to **Release Approval in Progress**. It creates a To Do using the release approval To Do type that is specified in the respective hold request type. Once a To Do is created, it is assigned to all the users with the release approval To Do role that is specified in the respective hold request type. In addition, it creates a log entry for the hold request when the To Do is created for the approver.

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C1-HRQ-TRANS

This algorithm is invoked when you click the **Approve** button. It changes the status of the hold request to **Released**.

C1-RELRESUBM

This algorithm is invoked when you click the **Re Submit** button. It changes the status of the hold request to **Active**. The submitter can then make the required changes and resubmit the hold release request for approval.

In addition, it creates a To Do using the submitter To Do type that is specified in the respective hold request type. Once a To Do is created, it is assigned to all the users with the submitter To Do role that is specified in the respective hold request type. Note that the To Do is created for the submitter only when the submitter To Do type and submitter To Do role are specified in the respective hold request type.

Note:

While requesting a submitter to resubmit a hold release request, the approver needs to specify the comments so that the submitter can make the required changes in the hold request.

The **Re Submit** button is not available to the approver when the hold request is created through the **Upload Request** feature or through an inbound web service.

C1-RELENTITY

This algorithm is invoked when you click the **Release** button. It checks whether the **Release Approval** option is selected in the respective hold request type. If the **Release Approval** option is selected in the respective hold request type, it changes the status of the hold request to **Release Approval in Progress**. However, if the **Release Approval** option is not selected in the respective hold request type, it changes the status of the hold request to **Released**. On releasing a hold request, it checks whether the number of entities added (either manually or via filter criteria) in the hold request exceeds the defer processing count. If the number of entities added in the hold request does not exceed the defer processing count, this algorithm does the following (in the online mode):

- If the hold request is created for the **Account** entity, the **Bill Generation** process is on hold, and the entity end date in the hold request is earlier than or equal to the system date or batch business date, the bill after date is cleared for the respective account.
- If the hold request is created for the **Account** entity , the **Auto Pay** process is on hold, and the entity end date in the hold request is earlier than or equal to the system date or batch business date, the defer auto pay until date is set to the system date for the respective account. In addition, it updates the automatic payment details of the debit bills (if any) for the respective account in the **CI_BILL_ACH** table.
- If the hold request is created for the **Account** entity, the **Overdue** process is on hold, and the entity end date in the hold request is earlier than or equal to the system date or batch business date, the postpone credit review until date is set to the system date for the respective account.
- If the hold request is created for the **Account** entity, the **Delinquency** process is on hold, and the entity end date in the hold request is earlier than or equal to the batch business date, the postpone credit review until date is set to the system date for the respective account. (**Note**: This happens only in the deferred mode when the **C1-HLMON** batch is executed.)
- If the hold request is created for the **Account** entity, the **Refund** process is on hold, and the entity end date in the hold request is earlier than or equal to the system date or batch business date, the hold refund until date is set to the system date for the respective account. In addition, the status of the refund request (if any) for the respective accounts is changed from **Hold** to its previous status.
- If the hold request is created for the **Person** entity, the **Bill Generation** process is on hold, and the entity end date in the hold request is earlier than or equal to the batch business date, the bill after date is cleared either for all the accounts in the person’s hierarchy or only for the persons’ immediate accounts depending on whether the **Hierarchy** option is selected or not. Note that the system considers only the child persons and not the grandchild persons from

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the person's hierarchy and then derives the accounts where the child person is the main customer. (**Note**: This happens only in the deferred mode when the **C1-HLMON** batch is executed.)

- If the hold request is created for the **Person** entity, the **Delinquency** process is on hold, and the entity end date in the hold request is earlier than or equal to the batch business date, the postpone credit review until date is set to the system date either for all the accounts in the person's hierarchy or only for the persons' immediate accounts depending on whether the **Hierarchy** option is selected or not. Note that the system considers only the child persons and not the grandchild persons from the person's hierarchy and then derives the accounts where the child person is the main customer. (**Note**: This happens only in the deferred mode when the **C1-HLMON** batch is executed.)

Note:

The above dates are updated to the system date only when the entity end date or respective process end date is not earlier than the system date.

This algorithm is also invoked when the approver approves the hold release request.

However, if the number of entities added in the hold request exceeds the defer processing count, a log entry is created indicating that the hold request is manually released but the above-mentioned release process would be completed when the **C1-HLMON** batch is executed.

This algorithm also updates the alert end date on the respective account to the system date irrespective of whether the number of entities added in the hold request exceeds the defer processing count or not.

This algorithm contains the following parameter:

- **Alert Type** – Used to indicate the alert type. The system then considers the alerts of the respective alert type on the account and updates its end date when the hold request is released. This parameter is optional.

Note: You need to specify the same alert type in both the **C1-HOLDACTV** and **C1-RELENTITY** algorithms.

C1-RLSHOLD

This algorithm is invoked when you click the **Release** button. If the hold entity end date and hold process end date is later than the system date, this algorithm sets the hold entity end date and hold process end date to the system date. In addition, it sets the hold request end date to the system date. Finally, it changes the status of the hold request to **Released**.

Hold Request Type

Oracle Revenue Management and Billing allows you to define a hold request type using which you can create a hold request. It is the hold request type which helps the system to determine the following:

- Business object using which the hold request should be created in the system
- Whether you can partially hold a bill through a hold request
- Whether a hold request must be activated or released in the deferred mode (i.e. in the background) or in the online mode (i.e. real time).
- Whether approval is required while activating or releasing a hold request
- Processes that you can keep on hold for an entity through a hold request

The **Hold Request Type** screen allows you to define, edit, delete, and copy a hold request type. It contains the following zones:

- Hold Request Type List on page 1900
- Hold Request Type on page 1900

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Hold Request Type List

The **Hold Request Type List** zone lists the hold request types that are already defined in the system. It contains the following columns:

Column Name	Column Description
Hold Request Type	Displays the hold request type.
Description	Displays the description of the hold request type.
Edit	On clicking the **Edit** (✎) icon, the **Hold Request Type** screen appears where you can edit the details of the hold request type.
Duplicate	On clicking the **Duplicate** (⧉) icon, the **Hold Request Type** screen appears where you can define a new hold request type using an existing hold request type.
Delete	On clicking the **Delete** (🗑) icon, you can delete the hold request type.
	Note: You can delete a hold request type only when a hold request is not yet created using the hold request type.

Note: Pagination is used to display limited number of records in this zone. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

On clicking the **Broadcast** (📡) icon corresponding to a hold request type, the **Hold Request Type** zone appears with the details of the respective hold request type.

Related Topics

For more information on...	See...
How to edit a hold request type	Editing a Hold Request Type on page 1910
How to copy a hold request type	Copying a Hold Request Type on page 1914
How to delete a hold request type	Deleting a Hold Request Type on page 1919
How to view the details of a hold request type	Viewing the Hold Request Type Details on page 1919

Hold Request Type

The **Hold Request Type** zone displays the details of the hold request type. It contains the following sections:

- **Main** - Displays the basic information about the hold request type. It contains the following fields:

Field Name	Field Description
Hold Request Type	Displays the hold request type.
Description	Displays the description of the hold request type.
Hold Request Business Object	Indicates the business object using which a hold request should be created. In addition, a context menu (⌄) icon appears corresponding to this field which helps in navigating to other screens in the application.

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Field Name	Field Description
	Note: It has a link. On clicking the link, the **Business Object** screen appears where you can view the details of the respective business object.
Detailed Description	Displays additional information about the hold request type.
Status	Indicates the status of the hold request type. The valid values are: • Active • Inactive
Allow Partial Hold for Bill	Indicates whether partial hold is allowed for a bill.
	Note: This field is applicable when you create a hold request (using the hold request type) where the entity level is set to **Bill**.
Defer Processing Count	Displays the count which helps to determine the following: • Whether a hold request must be activated or released in the deferred mode (i.e. in the background) or in the online mode (i.e. real time). • Whether the bill after date, postpone credit review until date, defer auto pay date, and hold refund until date must be calculated in the deferred or online mode. • Whether the automatic payment details must be updated in the **CI_BILL_ACH** table in the deferred or online mode.
Activation Approval	Indicates whether approval is required while activating a hold request (created using the hold request type) for an entity.
Activation Approval To Do Type	Indicates that the To Do entry of the specified To Do type must be created when a hold activation request is submitted for approval.
	Note: This field appears when the **Activation Approval** option is selected. It has a link. On clicking the link, the **To Do Type** screen appears where you can view the details of the respective To Do Type.
Activation Approval To Do Role	Indicates that users with the specified To Do role can only approve a hold activation request which is submitted for approval.
	Note: This field appears when the **Activation Approval** option is selected. It has a link. On clicking the link, the **To Do Role** screen appears where you can view the details of the respective To Do role.
Release Approval	Indicates whether approval is required while releasing a hold request (created using the hold request type) of an entity.
Release Approval To Do Type	Indicates that the To Do entry of the specified To Do type must be created when a hold release request is submitted for approval.

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Field Name	Field Description
	Note: This field appears when the **Release Approval** option is selected. It has a link. On clicking the link, the **To Do Type** screen appears where you can view the details of the respective To Do Type.
Release Approval To Do Role	Indicates that users with the specified To Do role can only approve a hold release request which is submitted for approval.
	Note: This field appears when the **Release Approval** option is selected. It has a link. On clicking the link, the **To Do Role** screen appears where you can view the details of the respective To Do role.
Submitter To Do Type	Indicates that the To Do entry of the specified To Do type must be created when the approver requests the submitter to resubmit a hold activation or release request for approval.
	Note: It has a link. On clicking the link, the **To Do Type** screen appears where you can view the details of the respective To Do type.
Submitter To Do Role	Indicates that users with the specified To Do role can only receive the To Do that is created when the approver requests the submitter to resubmit a hold activation or release request for approval.
	Note: It has a link. On clicking the link, the **To Do Role** screen appears where you can view the details of the respective To Do role.

- **Hold Processes** - Lists the processes that you can keep on hold for an entity while creating a hold request. The valid values are:
  - Auto Pay
  - Bill Generation
  - Delinquency
  - Funding
  - Overdue
  - Refund
- **Record Actions** - Enables you to perform various actions on the hold request type. It contains the following buttons:

Button Name	Button Description
Edit	Used to edit the details of the hold request type.
Delete	Used to delete the hold request type.
	Note: You can delete a hold request type when a hold request is not yet created using the hold request type.
Duplicate	Used to create a new hold request type using an existing hold request type.

- **Record Information** - This section contains the following field:

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Field Name	Field Description
Business Object	Indicates the business object using which the hold request type is created. In addition, a context menu (⊙) icon appears corresponding to this field which helps in navigating to other screens in the application.
	Note: It has a link. On clicking the link, the **Business Object** screen appears where you can view the details of the respective business object.

- **Characteristics** - Lists the characteristics of the hold request type. It contains the following columns:

Column Name	Column Description
Characteristic Type	Indicates the characteristic type.
Characteristic Value	Displays the value of the characteristic type.

By default, the **Hold Request Type** zone does not appear in the **Hold Request Type** screen. It appears when you click the **Broadcast** (📡) icon corresponding to the hold request type in the **Hold Request Type List** zone.

Related Topics

For more information on...	See...
Hold Request Type screen	Hold Request Type on page 1899
Hold Request Type List zone	Hold Request Type List on page 1900
How to define a hold request type	Defining a Hold Request Type on page 1903
How to edit a hold request type	Editing a Hold Request Type on page 1910
How to copy a hold request type	Copying a Hold Request Type on page 1914
How to delete a hold request type	Deleting a Hold Request Type on page 1919
How to view the details of a hold request type	Viewing the Hold Request Type Details on page 1919

Defining a Hold Request Type

Prerequisites

To define a hold request type, you should have:

- Hold request type business objects defined in the application
- Hold request business objects defined in the application
- Required To Do role assigned to the **C1-HLDAP** and **C1-HOLSB** To Do types in the application

Procedure

To define a hold request type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **H** and then click **Hold Request Type**.
   A sub-menu appears.
3. Click the **Add** option from the **Hold Request Type** sub-menu.

   The **Select Business Object** screen appears. It contains the following field:

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Field Name	Field Description	Mandatory (Yes or No)
Hold Request Type Business Object	Used to indicate the business object using which you want to create the hold request type. The valid value is: • **Hold Request Type (i.e., C1-HoldRequestType)** - Enables you to maintain a hold request type. **Note:** The above business object is shipped with the product. The list includes those business objects which are created using the **Hold Request Type** (i.e., **C1-HOLDRQTY**) maintenance object.	Yes

Tip: Alternatively, you can access the **Select Business Object** screen by clicking the **Add** button in the **Page Title** area of the **Hold Request Type** screen.

Note: The **Select Business Object** screen appears when there are multiple hold request type business objects defined in the application. If there is only one hold request type business object defined in the application, the **Hold Request Type** screen appears.

4. Select the required hold request type business object from the respective field.
5. Click **OK**.

The **Hold Request Type** screen appears. It contains the following sections:

- **Main** - Used to specify the basic details for the hold request type.
- **Hold Processes** - Used to lists the processes that you can keep on hold for an entity while creating a hold request.
- **Characteristics** - Used to define the characteristics for the hold request type.

The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Hold Request Type	Used to specify the hold request type.	Yes
Business Object	Indicates the business object using which you are defining the hold request type.	Not applicable
Description	Used to specify the description for the hold request type.	Yes
Hold Request Business Object	Used to indicate the business object using which you want to create the respective hold request. The valid values are: • **Hold Request - Display (i.e., C1-HoldReqDisplay)**- Enables you to display the details of a hold request. • **Hold Request - Maintenance (i.e., C1-HoldRequest)** - Enables you to maintain a hold request. **Note:** The above mentioned business objects are shipped with the product. The list includes those business objects which are created using the **Hold Request** (i.e., **C1-HOLDREQ**) maintenance object.	Yes
Detailed Description	Used to specify additional information about the hold request type.	No

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Field Name	Field Description	Mandatory (Yes or No)
	Note: You can resize the text box depending on your requirement by clicking the **Resize Handle** (⇲) icon at the bottom right corner of the text box.	
Status	Used to indicate the status of the hold request type. The valid values are: • Active • Inactive **Note:** You cannot change the status of a hold request type to **Inactive** when the corresponding hold request is in a status other than **Discarded**, **Rejected**, or **Released**.	Yes
Allow Partial Hold for Bill	Used to indicate whether partial hold is allowed for a bill. **Note:** This field is applicable when you create a hold request (using the hold request type) where the entity level is set to **Bill**.	Yes
Defer Processing Count	Used to specify the count which helps to determine the following: • Whether a hold request must be activated or released in the deferred mode (i.e. in the background) or in the online mode (i.e. real time). • Whether the bill after date, postpone credit review until date, defer auto pay date, and hold refund until date must be calculated in the deferred or online mode. • Whether the automatic payment details must be updated in the**CI_BILL_ACH** table in the deferred or online mode. **Note:** You must specify a positive integer value in this field. By default, the value is set to 0. If you do not change the value, the system will consider the defer processing count as 50. The **Deferred** mode means in the background when the **Hold Request Periodic Monitor (C1-HLDRQ)** batch is executed. You can configure the **Hold Request Periodic Monitor (C1-HLDRQ)** batch such that it is executed at regular intervals. For more information about this batch, refer to *Oracle Revenue Management and Billing Batch Guide*.	No
Activation Approval	Used to indicate whether approval is required while activating a hold request (created using the hold request type) for an entity.	No

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Field Name	Field Description	Mandatory (Yes or No)
Activation Approval To Do Type	Used to indicate that the To Do entry of the specified To Do type must be created when a hold activation request is submitted for approval. **Note:** The **Search** (🔍) icon appears corresponding to the **Activation Approval To Do Type** field. On clicking the **Search** icon, the **To Do Type Search** window appears. On specifying the To Do type, the description of the To Do type appears corresponding to the **Activation Approval To Do Type** field. This field appears when the **Activation Approval** option is selected. The**C1-HLDAP** To Do type is shipped with the product. You can use the **C1-HLDAP** To Do type or a custom To Do type, if required.	Yes (Conditional) **Note:** This field is required when the **Activation Approval** option is selected.
Activation Approval To Do Role	Used to indicate that users with the specified To Do role can only approve a hold activation request which is submitted for approval. **Note:** The list includes only those To Do roles which are associated with the activation approval To Do type. This field appears when the **Activation Approval** option is selected.	Yes (Conditional) **Note:** This field is required when the **Activation Approval** option is selected.
Release Approval	Used to indicate whether approval is required while releasing a hold request (created using the hold request type) of an entity.	No
Release Approval To Do Type	Used to indicate that the To Do entry of the specified To Do type must be created when a hold release request is submitted for approval. **Note:** The **Search** (🔍) icon appears corresponding to the **Release Approval To Do Type** field. On clicking the **Search** icon, the **To Do Type Search** window appears. On specifying the To Do type, the description of the To Do type appears corresponding to the **Release Approval To Do Type** field. This field appears when the **Release Approval** option is selected. The**C1-HLDAP** To Do type is shipped with the product. You can use the **C1-HLDAP** To Do type or a custom To Do type, if required.	Yes (Conditional) **Note:** This field is required when the **Release Approval** option is selected.

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Field Name	Field Description	Mandatory (Yes or No)
Release Approval To Do Role	Used to indicate that users with the specified To Do role can only approve a hold release request which is submitted for approval. **Note:** This field appears when the **Release Approval** option is selected. The list includes only those To Do roles which are associated with the release approval To Do type.	Yes (Conditional) **Note:** This field is required when the **Release Approval** option is selected.
Submitter To Do Type	Used to indicate that the To Do entry of the specified To Do type must be created when the approver requests the submitter to resubmit a hold activation or release request for approval. **Note:** The **Search** (🔍) icon appears corresponding to the **Submitter To Do Type** field. On clicking the **Search** icon, the **To Do Type Search** window appears. On specifying the To Do type, the description of the To Do type appears corresponding to the **Submitter To Do Type** field. The**C1-HOLSB** To Do type is shipped with the product. You can use the **C1-HOLSB** To Do type or a custom To Do type, if required.	No
Submitter To Do Role	Used to indicate that users with the specified To Do role can only receive the To Do that is created when the approver requests the submitter to resubmit a hold activation or release request for approval. **Note:** The list includes only those To Do roles which are associated with the submitter To Do type.	Yes (Conditional) **Note:** This field is required when the submitter To Do type is specified in the respective field.

6. Enter the required details in the **Main** section.
7. Add the processes that you can keep on hold for an entity while creating the corresponding hold request.
8. Define characteristics for the hold request type, if required.
9. Click **Save**.
   The hold request type is defined.

Related Topics

For more information on...	See...
Hold Request Type screen	Hold Request Type on page 1899
How to add a process in a hold request type	Adding a Hold Process in a Hold Request Type on page 1908
How to define a characteristic for a hold request type	Defining a Characteristic for a Hold Request Type on page 1909

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Adding a Hold Process in a Hold Request Type

Prerequisites

To add a hold process in a hold request type, you should have:

- Values defined in the **HOLD_PROCESS_FLG** lookup field

Procedure

To add a hold process in a hold request type:

1. Ensure that the **Hold Processes** section is expanded when you are defining, editing, or copying a hold request type.

   The **Hold Processes** section contains the following field:

Field Name	Field Description	Mandatory (Yes or No)
Hold Process	Used to indicate the process that you want keep on hold for an entity through a hold request. The valid values are: • **Auto Pay** - Used when you want to hold the automatic payment process of an entity through a hold request. • **Bill Generation** - Used when you want to hold the bill generation process of an entity through a hold request. • **Delinquency** - Used when you want to hold the delinquency process of an entity through a hold request. • **Funding** - Used when you want to hold the funding process of an entity through a hold request. • **Overdue** - Used when you want to hold the overdue process of an entity through a hold request. • **Refund** - Used when you want to hold the refund process of an entity through a hold request.	Yes
	Note: When you create a hold request using a hold request type, the system will derive only those hold processes that are added in the hold request type in the respective list of the **Hold Request** screen. The list includes only those processes which are added in the **HOLD_PROCESS_FLG** lookup field. You must select at least one hold process while defining a hold request type.	

2. Enter the required details in the **Hold Processes** section.
3. If you want to add more than one hold process for the hold request type, click the **Add** (+) icon and then repeat *s*tep 2.

Note: However, if you want to remove a hold process from the hold request type, click the **Delete** (🗑) icon corresponding to the hold process. Note that you cannot remove a process from the hold request type when one or more hold requests with the hold process is in a status other than **Discarded**, **Rejected**, or **Released**.

Related Topics

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For more information on...	See...
How to define a hold request type	Defining a Hold Request Type on page 1903
How to edit a hold request type	Editing a Hold Request Type on page 1910
How to copy a hold request type	Copying a Hold Request Type on page 1914

Defining a Characteristic for a Hold Request Type

Prerequisites

To define a characteristic for a hold request type, you should have:

- Characteristic types defined in the application (where the characteristic entity is set to **Hold Request Type**)

Procedure

To define a characteristic for a hold request type:

1. Ensure that the **Characteristics** section is expanded when you are defining, editing, or copying a hold *r*equest type.

   The **Characteristics** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Characteristic Type	Used to indicate the characteristic type.	Yes (Conditional)
	Note: The list includes only those characteristic types where the characteristic entity is set to **Hold Request Type**.	**Note:** This field is required when you are defining a characteristic for the hold request type.
Characteristic Value	Used to specify the value for the characteristic type.	Yes (Conditional)
	Note: If you select a predefined characteristic type, the **Search** (🔍) icon appears corresponding to the **Characteristic Value** field. On clicking the **Search** icon, the **Predefined Characteristic Search** window appears. On specifying the value for a predefined characteristic type, the description of the characteristic value appears corresponding to the **Characteristic Value** field.	**Note:** This field is required when you are defining a characteristic for the hold request type.

2. Enter the required details in the **Characteristics** section.
3. If you want to define more than one characteristic for the hold request type, click the **Add** (+) icon and then *r*epeat step *2*.

Note: However, if you want to remove a characteristic from the hold request type, click the **Delete** (🗑) icon corresponding to the characteristic.

Related Topics

For more information on...	See...
How to define a hold request type	Defining a Hold Request Type on page 1903

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For more information on...	See...
How to edit a hold request type	Editing a Hold Request Type on page 1910
How to copy a hold request type	Copying a Hold Request Type on page 1914

Editing a Hold Request Type

Prerequisites

To edit a hold request type, you should have:

- Hold request business objects defined in the application
- Required To Do role assigned to the **C1-HLDAP** and **C1-HOLSB** To Do types in the application

Procedure

To edit a hold request type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **H** and then click **Hold Request Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Hold Request Type** sub-menu.
   The **Hold Request Type** screen appears.
4. In the **Hold Request Type List** zone, click the **Edit** (✎) icon in the **Edit** column corresponding to the hold *r*equest type whose details you want to edit.

   The **Hold Request Type** screen appears. It contains the following sections:

   - **Main** - Used to specify the basic details for the hold request type.
   - **Hold Processes** - Used to lists the processes that you can keep on hold for an entity while creating a hold request.
   - **Characteristics** - Used to define the characteristics for the hold request type.

   The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Hold Request Type	Displays the hold request type.	Not applicable
Business Object	Indicates the business object which is used while defining the hold request type.	Not applicable
Description	Used to specify the description for the hold request type.	Yes
Hold Request Business Object	Used to indicate the business object using which you want to create the respective hold request. The valid values are: • **Hold Request - Display (i.e., C1-HoldReqDisplay)**- Enables you to display the details of a hold request. • **Hold Request - Maintenance (i.e., C1-HoldRequest)** - Enables you to maintain a hold request.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The above mentioned business objects are shipped with the product. The list includes those business objects which are created using the **Hold Request** (i.e., **C1-HOLDREQ**) maintenance object.	
Detailed Description	Used to specify additional information about the hold request type. **Note:** You can resize the text box depending on your requirement by clicking the **Resize Handle** ( ) icon at the bottom right corner of the text box.	No
Status	Used to indicate the status of the hold request type. The valid values are: • Active • Inactive **Note:** You cannot change the status of a hold request type to **Inactive** when the corresponding hold request is in a status other than **Discarded**, **Rejected**, or **Released**.	Yes
Allow Partial Hold for Bill	Used to indicate whether partial hold is allowed for a bill. **Note:** This field is applicable when you create a hold request (using the hold request type) where the entity level is set to **Bill**.	Yes
Defer Processing Count	Used to specify the count which helps to determine the following: • Whether a hold request must be activated or released in the deferred mode (i.e. in the background) or in the online mode (i.e. real time). • Whether the bill after date, postpone credit review until date, defer auto pay date, and hold refund until date must be calculated in the deferred or online mode. • Whether the automatic payment details must be updated in the**CI_BILL_ACH** table in the deferred or online mode.	No

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Field Name	Field Description	Mandatory (Yes or No)
	Note: You must specify a positive integer value in this field. By default, the value is set to 0. If you do not change the value, the system will consider the defer processing count as 50. The **Deferred** mode means in the background when the **Hold Request Periodic Monitor (C1-HLDRQ)** batch is executed. You can configure the **Hold Request Periodic Monitor (C1-HLDRQ)** batch such that it is executed at regular intervals. For more information about this batch, refer to *Oracle Revenue Management and Billing Batch Guide*.	
Activation Approval	Used to indicate whether approval is required while activating a hold request (created using the hold request type) for an entity.	No
Activation Approval To Do Type	Used to indicate that the To Do entry of the specified To Do type must be created when a hold activation request is submitted for approval. **Note:** The **Search** (🔍) icon appears corresponding to the **Activation Approval To Do Type** field. On clicking the **Search** icon, the **To Do Type Search** window appears. On specifying the To Do type, the description of the To Do type appears corresponding to the **Activation Approval To Do Type** field. This field appears when the **Activation Approval** option is selected. The**C1-HLDAP** To Do type is shipped with the product. You can use the **C1-HLDAP** To Do type or a custom To Do type, if required.	Yes (Conditional) **Note:** This field is required when the **Activation Approval** option is selected.
Activation Approval To Do Role	Used to indicate that users with the specified To Do role can only approve a hold activation request which is submitted for approval. **Note:** The list includes only those To Do roles which are associated with the activation approval To Do type. This field appears when the **Activation Approval** option is selected.	Yes (Conditional) **Note:** This field is required when the **Activation Approval** option is selected.
Release Approval	Used to indicate whether approval is required while releasing a hold request (created using the hold request type) of an entity.	No

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Field Name	Field Description	Mandatory (Yes or No)
Release Approval To Do Type	Used to indicate that the To Do entry of the specified To Do type must be created when a hold release request is submitted for approval. **Note:** The **Search** (🔍) icon appears corresponding to the **Release Approval To Do Type** field. On clicking the **Search** icon, the **To Do Type Search** window appears. On specifying the To Do type, the description of the To Do type appears corresponding to the **Release Approval To Do Type** field. This field appears when the **Release Approval** option is selected. The**C1-HLDAP** To Do type is shipped with the product. You can use the **C1-HLDAP** To Do type or a custom To Do type, if required.	Yes (Conditional) **Note:** This field is required when the **Release Approval** option is selected.
Release Approval To Do Role	Used to indicate that users with the specified To Do role can only approve a hold release request which is submitted for approval. **Note:** This field appears when the **Release Approval** option is selected. The list includes only those To Do roles which are associated with the release approval To Do type.	Yes (Conditional) **Note:** This field is required when the **Release Approval** option is selected.
Submitter To Do Type	Used to indicate that the To Do entry of the specified To Do type must be created when the approver requests the submitter to resubmit a hold activation or release request for approval. **Note:** The **Search** (🔍) icon appears corresponding to the **Submitter To Do Type** field. On clicking the **Search** icon, the **To Do Type Search** window appears. On specifying the To Do type, the description of the To Do type appears corresponding to the **Submitter To Do Type** field. The**C1-HOLSB** To Do type is shipped with the product. You can use the **C1-HOLSB** To Do type or a custom To Do type, if required.	No
Submitter To Do Role	Used to indicate that users with the specified To Do role can only receive the To Do that is created when	Yes (Conditional)

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Field Name	Field Description	Mandatory (Yes or No)
	the approver requests the submitter to resubmit a hold activation or release request for approval. **Note:** The list includes only those To Do roles which are associated with the submitter To Do type.	**Note:** This field is required when the submitter To Do type is specified in the respective field.

Tip: Alternatively, you can click the **Edit** button in the **Hold Request Type** zone to edit the details of the hold request type.

5. Modify the required details in the **Main** section.
6. Add or remove the hold processes from the hold request type, if required.

Note: You cannot remove a process from the hold request type when one or more hold requests with the hold process is in a status other than **Discarded**, **Rejected**, or **Released**.

7. Define, edit, or remove characteristics of the hold request type, if required.
8. Click **Save**.
   The changes made to the hold request type are saved.

Related Topics

For more information on...	See...
Hold Request Type screen	Hold Request Type on page 1899
Hold Request Type List zone	Hold Request Type List on page 1900
Hold Request Type zone	Hold Request Type on page 1900
How to add a process in a hold request type	Adding a Hold Process in a Hold Request Type on page 1908
How to define a characteristic for a hold request type	Defining a Characteristic for a Hold Request Type on page 1909

Copying a Hold Request Type

Instead of creating a hold request type from scratch, you can create a new hold request type using an existing hold request type. This is possible through copying a hold request type. On copying a hold request type, the details including the hold processes and characteristics are copied to the new hold request type. You can then edit the details, if required.

Prerequisites

To copy a hold request type, you should have:

- Hold request type (whose copy you want to create) defined in the application
- Hold request business objects defined in the application
- Required To Do role assigned to the **C1-HLDAP** and **C1-HOLSB** To Do types in the application

Procedure

To copy a hold request type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **H** and then click **Hold Request Type**.
   A sub-menu appears.

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3. Click the **Search** option from the **Hold Request Type** sub-menu.
   The **Hold Request Type** screen appears.
4. In the **Hold Request Type List** zone, click the **Duplicate** (⧉) icon in the **Duplicate** column *c*orresponding to the hold request type whose copy you want to create.

   The **Hold Request Type** screen appears. It contains the following sections:

   - **Main** - Used to specify the basic details for the hold request type.
   - **Hold Processes** - Used to lists the processes that you can keep on hold for an entity while creating a hold request.
   - **Characteristics** - Used to define the characteristics for the hold request type.

   The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Hold Request Type	Used to specify the hold request type.	Yes
Business Object	Indicates the business object using which you are defining the hold request type.	Not applicable
Description	Used to specify the description for the hold request type.	Yes
Hold Request Business Object	Used to indicate the business object using which you want to create the respective hold request. The valid values are: • **Hold Request - Display (i.e., C1-HoldReqDisplay)**- Enables you to display the details of a hold request. • **Hold Request - Maintenance (i.e., C1-HoldRequest)** - Enables you to maintain a hold request. **Note:** The above mentioned business objects are shipped with the product. The list includes those business objects which are created using the **Hold Request** (i.e., **C1-HOLDREQ**) maintenance object.	Yes
Detailed Description	Used to specify additional information about the hold request type. **Note:** You can resize the text box depending on your requirement by clicking the **Resize Handle** (⇲) icon at the bottom right corner of the text box.	No
Status	Used to indicate the status of the hold request type. The valid values are: • Active • Inactive **Note:** You cannot change the status of a hold request type to **Inactive** when the corresponding hold request is in a status other than **Discarded**, **Rejected**, or **Released**.	Yes
Allow Partial Hold for Bill	Used to indicate whether partial hold is allowed for a bill.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	Note: This field is applicable when you create a hold request (using the hold request type) where the entity level is set to **Bill**.	
Defer Processing Count	Used to specify the count which helps to determine the following: • Whether a hold request must be activated or released in the deferred mode (i.e. in the background) or in the online mode (i.e. real time). • Whether the bill after date, postpone credit review until date, defer auto pay date, and hold refund until date must be calculated in the deferred or online mode. • Whether the automatic payment details must be updated in the**CI_BILL_ACH** table in the deferred or online mode. **Note:** You must specify a positive integer value in this field. By default, the value is set to 0. If you do not change the value, the system will consider the defer processing count as 50. The **Deferred** mode means in the background when the **Hold Request Periodic Monitor (C1-HLDRQ)** batch is executed. You can configure the **Hold Request Periodic Monitor (C1-HLDRQ)** batch such that it is executed at regular intervals. For more information about this batch, refer to *Oracle Revenue Management and Billing Batch Guide*.	No
Activation Approval	Used to indicate whether approval is required while activating a hold request (created using the hold request type) for an entity.	No
Activation Approval To Do Type	Used to indicate that the To Do entry of the specified To Do type must be created when a hold activation request is submitted for approval.	Yes (Conditional)

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The **Search** (🔍) icon appears corresponding to the **Activation Approval To Do Type** field. On clicking the **Search** icon, the **To Do Type Search** window appears. On specifying the To Do type, the description of the To Do type appears corresponding to the **Activation Approval To Do Type** field. This field appears when the **Activation Approval** option is selected. The**C1-HLDAP** To Do type is shipped with the product. You can use the **C1-HLDAP** To Do type or a custom To Do type, if required.	**Note:** This field is required when the **Activation Approval** option is selected.
Activation Approval To Do Role	Used to indicate that users with the specified To Do role can only approve a hold activation request which is submitted for approval. **Note:** The list includes only those To Do roles which are associated with the activation approval To Do type. This field appears when the **Activation Approval** option is selected.	Yes (Conditional) **Note:** This field is required when the **Activation Approval** option is selected.
Release Approval	Used to indicate whether approval is required while releasing a hold request (created using the hold request type) of an entity.	No
Release Approval To Do Type	Used to indicate that the To Do entry of the specified To Do type must be created when a hold release request is submitted for approval. **Note:** The **Search** (🔍) icon appears corresponding to the **Release Approval To Do Type** field. On clicking the **Search** icon, the **To Do Type Search** window appears. On specifying the To Do type, the description of the To Do type appears corresponding to the **Release Approval To Do Type** field. This field appears when the **Release Approval** option is selected. The**C1-HLDAP** To Do type is shipped with the product. You can use the **C1-HLDAP** To Do type or a custom To Do type, if required.	Yes (Conditional) **Note:** This field is required when the **Release Approval** option is selected.
Release Approval To Do Role	Used to indicate that users with the specified To Do role can only approve a hold release request which is submitted for approval.	Yes (Conditional)

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Field Name	Field Description	Mandatory (Yes or No)
	Note: This field appears when the **Release Approval** option is selected. The list includes only those To Do roles which are associated with the release approval To Do type.	**Note:** This field is required when the **Release Approval** option is selected.
Submitter To Do Type	Used to indicate that the To Do entry of the specified To Do type must be created when the approver requests the submitter to resubmit a hold activation or release request for approval.	No
	Note: The **Search** (🔍) icon appears corresponding to the **Submitter To Do Type** field. On clicking the **Search** icon, the **To Do Type Search** window appears. On specifying the To Do type, the description of the To Do type appears corresponding to the **Submitter To Do Type** field. The**C1-HOLSB** To Do type is shipped with the product. You can use the **C1-HOLSB** To Do type or a custom To Do type, if required.	
Submitter To Do Role	Used to indicate that users with the specified To Do role can only receive the To Do that is created when the approver requests the submitter to resubmit a hold activation or release request for approval.	Yes (Conditional)
	Note: The list includes only those To Do roles which are associated with the submitter To Do type.	**Note:** This field is required when the submitter To Do type is specified in the respective field.

Tip: Alternatively, you can click the **Duplicate** button in the **Hold Request Type** zone to create a copy of the hold request type.

5. Enter the required details in the **Main** section.
6. Add or remove the hold processes from the hold request type, if required.
7. Define, edit, or remove characteristics of the hold request type, if required.
8. Click **Save**.
   The new hold request type is defined.

Related Topics

For more information on...	See...
Hold Request Type screen	Hold Request Type on page 1899
Hold Request Type List zone	Hold Request Type List on page 1900
Hold Request Type zone	Hold Request Type on page 1900
How to add a process in a hold request type	Adding a Hold Process in a Hold Request Type on page 1908

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For more information on...	See...
How to define a characteristic for a hold request type	Defining a Characteristic for a Hold Request Type on page 1909

Deleting a Hold Request Type

Procedure

To delete a hold request type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **H** and then click **Hold Request Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Hold Request Type** sub-menu.
   The **Hold Request Type** screen appears.
4. In the **Hold Request Type List** zone, click the **Delete** (🗑) icon in the **Delete** column corresponding to the *h*old request type that you want to delete.

   A message appears confirming whether you want to delete the hold request type.

   Note: You can delete a hold request type only when a hold request is not yet created using the hold request type.

   Tip: Alternatively, you can click the **Delete** button in the **Hold Request Type** zone to delete the hold request type.
5. Click **OK**.
   The hold request type is deleted.

Related Topics

For more information on...	See...
Hold Request Type screen	Hold Request Type on page 1899
Hold Request Type List zone	Hold Request Type List on page 1900
Hold Request Type zone	Hold Request Type on page 1900

Viewing the Hold Request Type Details

Procedure

To view the details of a hold request type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **H** and then click **Hold Request Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Hold Request Type** sub-menu.
   The **Hold Request Type** screen appears.
4. In the **Hold Request Type List** zone, click the **Broadcast** (📡) icon corresponding to the hold request type *w*hose details you want to view.
   The **Hold Request Type** zone appears.

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5. View the details of the hold request type in the **Hold Request Type** zone.

Related Topics

For more information on...	See...
Hold Request Type screen	Hold Request Type on page 1899
Hold Request Type List zone	Hold Request Type List on page 1900
Hold Request Type zone	Hold Request Type on page 1900

Hold Request (Used for Searching)

The **Hold Request** screen allows you to search for a hold request using various search criteria. It also allows you to create a hold request. It contains the following zone:

- Search Hold Request on page 1920

Through this screen, you can navigate to the following screen:

- Hold Request (Used for Viewing) on page 1947

Search Hold Request

The **Search Hold Request** zone allows you to search for a hold request using various search criteria. It contains the following two sections:

- **Search Criteria** - The **Search Criteria** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Search By	Used to indicate whether you want to search for a hold request using the hold request or bill details. The valid values are: • Request Details • Bill Details **Note:** By default, the **Request Details** option is selected.	Yes
Hold Request Type	Used to search for hold requests which are created using a particular hold request type. **Note:** This field appears when the **Request Details** option is selected from the **Search By** list. The list includes only those hold request types which are already defined in the system.	No
Entity	Used to search for hold requests which are created at a particular entity level. The valid values are: • Account • Bill • Person	No

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Field Name	Field Description	Mandatory (Yes or No)
	Note: This field appears when the **Request Details** option is selected from the **Search By** list. The list includes only those values which are defined in the **HOLD_ENTITY_LVL_FLG** lookup field.	
Hold Process	Used to search for hold requests which are created to hold a particular process of an entity. The valid values are: • Auto Pay • Bill Generation • Delinquency • Funding • Overdue • Refund **Note:** This field appears when the **Request Details** option is selected from the **Search By** list. The list includes only those values which are added in the **HOLD_PROCESS_FLG** lookup field.	No
User ID	Used to search for hold requests which are created by a particular user. **Note:** This field appears when the **Request Details** option is selected from the **Search By** list.	No
Hold Reason	Used to search for hold requests which are created due a particular reason. **Note:** This field appears when the **Request Details** option is selected from the **Search By** list. The list includes only those values which are defined in the **HOLD_REASON_FLG** lookup field.	No
Start Date	Used to search for hold requests which are created from a particular date onwards. **Note:** This field appears when the **Request Details** option is selected from the **Search By** list. You can either manually specify the date or select it using the **Date Picker** ( ) icon corresponding to the field.	No

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Field Name	Field Description	Mandatory (Yes or No)
Status	Used to search for hold requests with a particular status. The valid values are: • Active • Activation Approval In Progress • Deferred Processing • Discarded • Draft • Entity Derivation Pending • Rejected • Released • Release Approval in Progress • Release Request Approved • Return Release Request to Submitter **Note:** This field appears when the **Request Details** option is selected from the **Search By** list.	No
End Date	Used to search for hold requests which are created till a particular date. **Note:** This field appears when the **Request Details** option is selected from the **Search By** list. You can either manually specify the date or select it using the **Date Picker** ( ) icon corresponding to the field.	No
Account ID	Used to search for hold requests which are created for a particular account. **Note:** This field appears when the **Request Details** option is selected from the **Search By** list. The **Search** () icon appears corresponding to the **Account ID** field. On clicking the **Search** icon, the **Account Search** window appears.	No
Person ID	Used to search for hold requests which are created for a particular person. **Note:** This field appears when the **Request Details** option is selected from the **Search By** list. The **Search** () icon appears corresponding to the **Person ID** field. On clicking the **Search** icon, the **Person Search** window appears.	No
Hold Request ID	Used to search for a particular hold request.	No

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Field Name	Field Description	Mandatory (Yes or No)
	Note: This field appears when the **Request Details** option is selected from the **Search By** list.	
Bill ID	Used to search for hold requests which are created for a particular bill. **Note:** This field appears when the **Bill Details** option is selected from the **Search By** list. The **Search** (🔍) icon appears corresponding to the **Bill ID** field. On clicking the **Search** icon, the **Bill Search** window appears.	No
Bill Date From	Used to search for hold requests created for bills that are completed on or after the specified date. **Note:** This field appears when the **Bill Details** option is selected from the **Search By** list. You can either manually specify the date or select it using the **Date Picker** (📅) icon corresponding to the field.	Yes (Conditional) **Note:** This field is required when the search criteria is specified in the **To** field.
To	Used to search for hold requests created for bills that are completed on or before the specified date. **Note:** This field appears when the **Bill Details** option is selected from the **Search By** list. You can either manually specify the date or select it using the **Date Picker** (📅) icon corresponding to the field.	Yes (Conditional) **Note:** This field is required when the search criteria is specified in the **Bill Date From** field.

Note: You must specify at least one search criterion while searching for a hold request.

- **Search Results** - On clicking the **Search** button, the search results appear based on the specified search criteria. The **Search Results** section contains the following columns:

Column Name	Column Description
Creation Date Time	Displays the date and time when the hold request is created.
Hold Request Information	Displays information about the hold request. **Note:** It has a link. On clicking the link, the **Hold Request** screen appears where you can view the details of the respective hold request.
Status	Indicates the status of the hold request. The valid values are: • Active • Activation Approval In Progress • Deferred Processing

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Column Name	Column Description
	• Discarded • Draft • Entity Derivation Pending • Rejected • Released • Release Approval in Progress • Release Request Approved • Return Release Request to Submitter
Start Date	Displays the date from when the hold request is effective.
End Date	Displays the date till when the hold request is effective.
Hold Processes	Indicates the processes which are kept on hold for the entity through the hold request. If multiple processes are selected in a hold request, the system concatenates and displays the hold processes separated by the **Comma** (,) symbol.
Hold Reason	Indicates the reason why the hold request is created for the entity.
Created By	Indicates the user who has created the hold request.

Note: Pagination is used to display limited number of records in the **Search Results** section. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

Related Topics

For more information on...	See...
How to search for a hold request	Searching for a Hold Request on page 1924
How to view the details of a hold request	Viewing the Hold Request Details on page 1946
How to create a hold request	Creating a Hold Request on page 1925

Searching for a Hold Request

Prerequisites

To search for a hold request, you should have:

- Hold request types defined in the application
- Values defined in the **HOLD_REASON_FLG** lookup field

Procedure

To search for a hold request:

1. Click the **Menu** link in the **Application** toolbar.
   A list appears.
2. From the **Main** menu, select **Accounting and Receivable** and then click **Hold Request**.
   A sub-menu appears.
3. Click the **Search** option from the **Hold Request** sub-menu.
   The **Hold Request** screen appears.
4. Enter the search criteria in the **Search Hold Request** zone.

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> **Note:** ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.

5. Click **Search**.
   A list of hold requests that meet the search criteria appears in the **Search Results** section.

Related Topics

For more information on...	See...
Hold Request screen	Hold Request (Used for Searching) on page 1920
Search Hold Request zone	Search Hold Request on page 1920

Creating a Hold Request

Prerequisites

To create a hold request, you should have:

- Hold request types defined in the application.
- Values defined in the **HOLD_REASON_FLG** lookup field

Procedure

To create a hold request:

1. Do either of the following:

If you want to...	Then...
Hold a bill through a hold request from the Account Receivable Central screen	**a.** Click the **Menu** link in the **Application** toolbar. A list appears. **b.** From the **Main** menu, select **Accounting and Receivable** and then click **Account Receivable Central**. The **Account Receivable Central** screen appears. **c.** Search for a bill that you want to keep on hold in the **Search Bill** zone. A list of bills that meet the search criteria appears in the search results. **d.** In the **Search Results** section, select the check box corresponding to the required bill that you want keep on hold and then click **Hold**.
	Note: You can select only one bill at a time while creating a hold request from the **Account Receivable Central** screen. You can only select a bill with non-zero outstanding balance.
Hold a bill through a hold request from the Funding Request screen	**a.** Click the **Menu** link in the **Application** toolbar. A list appears. **b.** From the **Main** menu, select **Accounting and Receivable** and then click **Funding Request**. The **Funding Request** screen appears.

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If you want to...	Then...
	c. Search for the required draft funding request in the **Search Funding Request** zone. A list of funding request that meet the search criteria appears in the search results. **d.** In the **Search Results** section, click the link in the **Funding Request Information** column corresponding to the funding request whose details you want to edit. The **Funding Request** screen appears. **e.** Click the **Bills** tab. **f.** Select the check box corresponding to the bills that you want to keep on hold in the **Selected Bills** zone. **g.** Click the **Hold** button.
	Note: Before clicking the **Hold** button, you must ensure that the **Funding Exclusion Reason** option type is set in the **C1-HOLDSRCH** feature configuration. You can select multiple bills at the same time while creating a hold request from the **Funding Request** screen. You can only select a bill with non-zero outstanding balance.
Hold an account through a hold request from the Delinquency Central screen	**a.** Click the **Menu** link in the **Application** toolbar. A list appears. **b.** From the **Main** menu, select **Delinquency Management** and then click **Delinquency Central**. The **Delinquency Central** screen appears. **c.** Search for the overdue process of an account in the **Search Overdue Process** zone. A list of overdue processes that meet the search criteria appears in the search results. **d.** In the **Search Results** section, select the check box corresponding to the required overdue process of an account whose processes you want to keep on hold and then click **Create Hold Request**.
	Note: You can select only one overdue process at a time while creating a hold request for an account from the **Account Receivable Central** screen.
Create a hold request for a person, account, or bill from the Hold Request screen	**a.** Click the **Menu** link in the **Application** toolbar. A list appears. **b.** From the **Main** menu, select **Accounting and Receivable** and then click **Hold Request**. A sub-menu appears. **c.** Click the **Add** option from the **Hold Request** sub-menu.

The **Add Hold Request** screen appears. It contains the following field:

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Field Name	Field Description	Mandatory (Yes or No)
Hold Request Type	Used to indicate the hold request type using which you want to create the hold request. **Note:** The list includes only those hold request types which are already defined in the system.	Yes

Tip: Alternatively, you can access the **Add Hold Request** screen by clicking the **Add** button in the **Page Title** area of the **Hold Request** screen.

2. Select the required hold request type from the respective field.
3. Click **OK**.

The **Hold Request** screen appears. It contains the following sections:

- **Main** - Used to specify the basic details for the hold request.
- **Hold Entities** - Used to indicate the entity (such as, person, account, or bill depending on the specified entity level) that you want to keep on hold. This section appears only when the **Use Selection Criteria** option is not selected while creating a hold request for an account or a person.
- **Account Selection Criteria** - Used to specify a selection criteria to derive the list of accounts that you want to add in the hold request. This section appears only when the following conditions are met:
  - The **Account** option is selected from the **Entity** list.
  - The **Use Selection Criteria** option is selected.
- **Person Selection Criteria** - Used to specify a selection criteria to derive the list of persons that you want to add in the hold request. This section appears only when the following conditions are met:
  - The **Person** option is selected from the **Entity** list.
  - The **Use Selection Criteria** option is selected.
- **Hold Processes** - Used to indicate one or more processes of the entity that you want to keep on hold for a particular period.
- **Characteristics** - Used to define the characteristics for the hold request.

The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Hold Request Type	Indicates the hold request type using which you want to create the hold request.	Not applicable
Start Date	Used to specify the date from when the hold request is effective. **Note:** The hold request start date cannot be later than the hold request end date. By default, this field is set to the system date. You can specify a future date, if required. However, when you specify a past date, the system will automatically reset it to the system date. You can either manually specify the date or select it using the **Date Picker** ( ) icon corresponding to the field.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
End Date	Used to specify the date till when the hold request is effective. **Note:** The hold request end date cannot be earlier than the hold request start date. You can either manually specify the date or select it using the **Date Picker** ( ) icon corresponding to the field.	Yes
Hold Reason	Used to indicate the reason why you want to hold the entity. **Note:** The list includes only those values which are defined in the **HOLD_REASON_FLG** lookup field.	Yes
Entity	Used to indicate the type of entity for which you want to create the hold request. The valid values are: • Account • Bill • Person **Note:** The list includes only those values which are defined in the **HOLD_ENTITY_LVL_FLG** lookup field. If you are creating a hold request for a bill via the **Account Receivable Central** or **Funding Request** screen, the system, by default, sets the entity to **Bill** and the field is non-editable. If you are creating a hold request for an account via the **Delinquency Central** screen, the system, by default, sets the entity to **Account** and the field is non-editable.	Yes
Use Selection Criteria	Used to indicate whether you want to specify a selection criteria to derive the list of accounts or persons that you want to add in the hold request. **Note:** This field appears when the **Account** or **Person** option is selected from the **Entity** list.	No
Comments	Used to specify additional information about the hold request. **Note:** You can resize the text box depending on your requirement by clicking the **Resize Handle** ( ) icon at the bottom right corner of the text box.	No

4. Enter the required details in the **Main** section.

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5. Add the entities (such as, persons, accounts, or bills) that you want to keep on hold through the hold request.
6. Define the account or person selection criteria to derive the list of accounts or persons, respectively, that you want to add in the hold request.

> **Note:** This step is required only when the **Use Selection Criteria** option is selected while creating a hold request for an account or a person.

7. Add the processes of the entity that you want to keep on hold through the hold request.
8. Define characteristics for the hold request, if required.
9. Click **Save**.
   The hold request is created. The creation mode of the hold request is set to **Manual**.

> **Note:**
>
> If you create a hold request for a bill via the **Account Receivable Central** screen, the system sets the status of the hold request to either **Activation Approval In Progress** or **Active** depending on whether the approval process is configured in the respective hold request type. In addition, the **FROM_ARC_SW** field in the **C1_HOLD_REQ_DTLS** table is set to **Y**.
>
> If you create a hold request for an account via the **Delinquency Central** screen, the system sets the status of the hold request to either **Activation Approval In Progress** or **Active** depending on whether the approval process is configured in the respective hold request type. In addition, the **FROM_ARC_SW** field in the **C1_HOLD_REQ_DTLS** table is set to **Y**.
>
> If you create a hold request for a bill via the **Funding Request** screen, the system sets the status of the hold request to either **Activation Approval In Progress** or **Active** depending on whether the approval process is configured in the respective hold request type. In addition, the **FROM_ARC_SW** field in the **C1_HOLD_REQ_DTLS** table is set to **Y**. The status of the respective bill record in the funding request is set to **Excluded**. Also, the status reason is stamped corresponding to the excluded records. The system derives the status reason for the excluded records from the **Funding Exclusion Reason** option type of the **C1-HOLDSRCH** feature configuration.
>
> If you create a hold request for an account, person, or bill directly from the **Hold Request** screen, the system sets the status of the hold request to **Draft**. Note that if you create a hold request for an account or a person using the account selection criteria or person selection criteria, respectively, the system sets the status of the hold request to **Entity Derivation Pending**. In addition, a log entry is created indicating that the account or person derivation will happen after the Hold Request Entity Derivation Monitor batch is executed. For more information, see Hold Mass Accounts Using Selection Criteria on page 1871 and Hold Mass Persons Using Selection Criteria on page 1872.

Related Topics

For more information on...	See...
Hold Request screen	Hold Request (Used for Searching) on page 1920
How to add an entity in a hold request	Adding an Entity in a Hold Request on page 1930
How to define an account selection criteria	Defining an Account Selection Criteria for a Hold Request on page 1932
How to define a person selection criteria	Defining a Person Selection Criteria for a Hold Request on page 1942
How to add a process in a hold request	Adding a Process in a Hold Request on page 1944
How to define a characteristic for a hold request	Defining a Characteristic for a Hold Request on page 1945

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Adding an Entity in a Hold Request

Procedure

To add an entity in a hold request:

1. Ensure that the **Hold Entities** section is expanded when you are creating or editing a hold request.

   The **Hold Entities** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Hold Entity ID	Used to indicate the entity (such as, person, account, or bill depending on the specified entity level) that you want to keep on hold. **Note:** The **Search** (🔍) icon appears corresponding to the **Hold Entity ID** field. Depending on the entity level selected, the system behaves in the following manner on clicking the **Search** icon: • If the entity level is set to **Account**, the **Account Search** window appears. • If the entity level is set to **Person**, the **Person Search** window appears. • If the entity level is set to **Bill**, the **Bill Search** window appears. If you are creating a hold request for a bill via the **Account Receivable Central** or **Funding Request** screen, the system, by default, displays the selected bill ID and the field is non-editable. You cannot remove this selected bill from the hold request throughout its lifestyle. If you are creating a hold request for an account via the **Delinquency Central** screen, the system, by default, displays the account ID (of the selected overdue process) and the field is non-editable. You cannot remove this account from the hold request throughout its lifestyle. If the entity level is set to **Bill**, you must specify a bill with non-zero outstanding bill amount and which is in the **Complete** status.	Yes
Start Date	Used to specify the date from when you want to hold the entity.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The hold entity start date must be between the hold request start and end dates and between at least one process's start and end dates. The hold entity start date cannot be later than the hold entity end date. You can either manually specify the date or select it using the **Date Picker** ( ) icon corresponding to the field.	
End Date	Used to specify the date till when you want to hold the entity. **Note:** The hold entity end date must be between hold request start and end dates and between at least one process's start and end dates. The hold entity end date cannot be earlier than the hold entity start date. You can either manually specify the date or select it using the **Date Picker** ( ) icon corresponding to the field.	No
Hold Amount	Used to specify the outstanding bill amount that you want to keep on hold. **Note:** This field appears when the **Bill** option is selected from the **Entity** list. This field is editable only when the **Allow Partial Hold for Bill** option is selected in the respective hold request type. By default, the system displays the amount which is outstanding on the bill. If the field is editable, you can change the hold amount, if required. However, ensure that you specify a non-zero value in this field and the specified amount should not exceed the outstanding bill amount.	Yes
Hierarchy	Used to indicate whether all the accounts in the person's hierarchy or only the persons' immediate accounts should be kept on hold. Note that the system considers only the child persons and not the grand child persons from the person's hierarchy and then derives the accounts where the child person is the main customer. **Note:** This field appears when the **Person** option is selected from the **Entity** list.	No

Note: The **Hold Entities** section appears only when the **Use Selection Criteria** option is not selected while creating a hold request for an account or a person.

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2. Enter the required details in the **Hold Entities** section.
3. If you want to add more than one entity in the hold request, click the **Add** (+) icon and then repeat *s*tep 2.

> **Note:** However, if you want to remove an entity from the hold request, click the **Delete** (🗑) icon corresponding to the hold entity.

Related Topics

For more information on...	See...
How to create a hold request	Creating a Hold Request on page 1925

Defining an Account Selection Criteria for a Hold Request

Prerequisites

To define an account selection criteria for a hold request, you should have:

- Divisions, bill cycles, customer classes, states, health plans, membership identifier types, and policy types defined in the application
- Values defined in the **BILL_ADDR_SRCE_FLG**, **PRODUCT_TYPE_FLG**, **PRODUCT_HC_CAT_FLG**, **PRODUCT_LOB_FLG**, and **PRODUCT_LOB_CAT_FLG** lookup fields
- Required characteristic types defined in the application (where the characteristic entity is set to **Account**)
- Required characteristic types defined in the application (where the characteristic entity is set to **Membership**)
- Required characteristic types defined in the application (where the characteristic entity is set to **Health Plan**)
- Required characteristic types defined in the application (where the characteristic entity is set to **Product**)
- Required characteristic types defined in the application (where the characteristic entity is set to **Person**)
- Required characteristic types defined in the application (where the characteristic entity is set to **Policy**)

Procedure

To define an account selection criteria for a hold request:

1. Ensure that the **Account Selection Criteria** section is expanded when you are creating or editing a hold request.

   The **Account Selection Criteria** section contains the following field:

Field Name	Field Description	Mandatory (Yes or No)
Search By	Used to indicate whether you want to search for an account using the account, individual membership, person, or policy details. The valid values are: • Account Details • Individual Membership Details • Person Details • Policy Details **Note:** The **Individual Membership Details** and **Policy Details** options appear in the **Search By** list only when the **Environment Type** option type of the **SYSDT** feature configuration is set to **H**. For more information, see Setting the SYSDT Feature Configuration on page 1890.	Yes

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Note:

The **Account Selection Criteria** section appears only when the following conditions are met in the **Main** section:

- The **Account** option is selected from the **Entity** list.
- The **Use Selection Criteria** option is selected. Note that this option appears only when the **Account** or **Person** option is selected from the **Entity** list.

2. Select the required option depending on which you want to search for the accounts from the **Search By** list.

   The following fields appear in the **Account Selection Criteria** section:

Field Name	Field Description	Mandatory (Yes or No)
Address Source	Used to search for accounts where a particular address source is used to route the account's bills and/or quotes via the postal service. The valid values are: • Account Override • Bill • Main • Multiple Account Override • Person **Note:** This field appears when the **Account Details** option is selected from the **Search By** list. The list includes only those values which are defined in the **BILL_ADDR_SRCE_FLG** lookup field.	No
Division	You can use this field while searching for an account using the account, individual membership, or policy details. The context of this field changes depending on the respective option selected from the **Search By** list: • **Account Details** - This field enables you to search for accounts which belong to a particular division. • **Individual Membership Details** - This field enables you to search for individual membership's member persons' accounts that belong to a particular division. • **Policy Details** - This field enables you to search for policy persons' accounts that belong to a particular division.	No

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Field Name	Field Description	Mandatory (Yes or No)
	Note: This field appears when the **Account Details**, **Individual Membership Details**, or **Policy Details** option is selected from the **Search By** list. Note that in case of the latter two options (i.e., **Individual Membership Details** and **Policy Details**), this field appears only when you click the **Advanced Search** link available in the right side of the **Account Selection Criteria** section. The list includes only those divisions which are already defined in the system.	
State	You can use this field while searching for an account using the account, individual membership, person, or policy details. The context of this field changes depending on the respective option selected from the **Search By** list: • **Account Details** - This field enables you to search for accounts whose billing address belongs to a specific state. Note that this field is enabled while searching using the account details only when an option is selected from the **Address Source** list. • **Individual Membership Details** - This field enables you to search for accounts that belong to the individual membership's member persons who resides in a particular state. • **Person Details** - This field enables you to search for accounts belonging to persons (i.e., main customer) who reside in a particular state. • **Policy Details** - This field enables you to search for accounts of persons that are linked to policies issued in a particular state. **Note:** The **Search** (🔍) icon appears corresponding to the **State** field. On clicking the **Search** icon, the **State Search** window appears.	No
Bill Cycle	Used to search for accounts with a particular bill cycle. **Note:** This field appears when the **Account Details** option is selected from the **Search By** list. The list includes only those bill cycles which are already defined in the system.	No
County	You can use this field while searching for an account using the account, individual membership, person, or policy details. The context of this field changes depending on the respective option selected from the **Search By** list: • **Account Details** - This field enables you to search for accounts whose billing address belongs to a specific	No

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Field Name	Field Description	Mandatory (Yes or No)
	county. Note that this field is enabled while searching using the account details only when an option is selected from the **Address Source** list. • **Individual Membership Details** - This field enables you to search for accounts that belong to the individual membership's member persons who resides in a particular county. • **Person Details** - This field enables you to search for accounts belonging to persons (i.e., main customer) who reside in a particular county. • **Policy Details** - This field enables you to search for accounts of persons that are linked to policies issued in a particular county. **Note:** You can specify comma-separated values in this field.	
Customer Class	You can use this field while searching for an account using the account, individual membership, or policy details. The context of this field changes depending on the respective option selected from the **Search By** list: • **Account Details** - This field enables you to search for accounts which belong to a particular customer class. • **Individual Membership Details** - This field enables you to search for individual membership's member persons' accounts that belong to a particular customer class. • **Policy Details** - This field enables you to search for policy persons' accounts that belong to a particular customer class. **Note:** This field appears when the **Account Details**, **Individual Membership Details**, or **Policy Details** option is selected from the **Search By** list. Note that in case of the latter two options (i.e., **Individual Membership Details** and **Policy Details**), this field appears only when you click the **Advanced Search** link available in the right side of the **Account Selection Criteria** section. The list includes only those customer classes which are already defined in the system.	No
Postal	You can use this field while searching for an account using the account, individual membership, person, or policy details. The context of this field changes depending on the respective option selected from the **Search By** list: • **Account Details** - This field enables you to search for accounts whose billing address belongs to a specific postal or zip code. Note that this field is enabled while searching using the account details only when an option is selected from the **Address Source** list.	No

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Field Name	Field Description	Mandatory (Yes or No)
	• **Individual Membership Details** - This field enables you to search for accounts that belong to the individual membership's member persons who resides in an area with a particular postal or zip code. • **Person Details** - This field enables you to search for accounts belonging to persons (i.e., main customer) who reside in an area with a particular postal or zip code. • **Policy Details** - This field enables you to search for accounts of persons that are linked to policies issued in an area with a particular postal or zip code. **Note:** You can specify comma-separated values in this field.	
Product Type	Used to search for accounts of persons that are linked to individual memberships of a particular health product type. The valid values are: • Exclusive Provider Organization • Health Maintenance Organization • Point-of-Service Plan • Preferred Provider Organization **Note:** This field appears when the **Individual Membership Details** option is selected from the **Search By** list. The list includes only those values which are defined in the **PRODUCT_TYPE_FLG** lookup field.	No
Product Category	Used to search for accounts of persons that are linked to individual memberships of a particular health product category. The valid value is: • Medical **Note:** This field appears when the **Individual Membership Details** option is selected from the **Search By** list. The list includes only those values which are defined in the **PRODUCT_HC_CAT_FLG** lookup field.	No
Health Plan	Used to search for accounts of persons that are linked to individual memberships of a particular health plan. **Note:** This field appears when the **Individual Membership Details** option is selected from the **Search By** list. You must specify a health plan which is already defined in the system.	No

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Field Name	Field Description	Mandatory (Yes or No)
Start Date	You can use this field while searching for an account using the individual membership or policy details. The context of this field changes depending on the respective option selected from the **Search By** list: • **Individual Membership Details** - This field enables you to search for accounts of persons that are linked to individual memberships with a particular start date. • **Policy Details** - This field enables you to search for accounts of persons that are linked to policies with a particular start date. **Note:** This field appears when the **Individual Membership Details** or **Policy Details** option is selected from the **Search By** list. You can either manually specify the date or select it using the **Date Picker** ( ) icon corresponding to the field.	No
End Date	You can use this field while searching for an account using the individual membership or policy details. The context of this field changes depending on the respective option selected from the **Search By** list: • **Individual Membership Details** - This field enables you to search for accounts of persons that are linked to individual memberships with a particular end date. • **Policy Details** - This field enables you to search for accounts of persons that are linked to policies with a particular end date. **Note:** This field appears when the **Individual Membership Details** or **Policy Details** option is selected from the **Search By** list. You can either manually specify the date or select it using the **Date Picker** ( ) icon corresponding to the field.	No
Membership Identifier Type	Used to search for accounts of persons that are linked to individual memberships using a particular membership identifier type. **Note:** This field appears when the **Individual Membership Details** option is selected from the **Search By** list. The list includes only those membership identifier types which are already defined in the system.	Yes (Conditional) **Note:** If you specify the membership identifier as a search criteria, you have to select the membership identifier type.
Membership Identifier	Used to search for accounts of persons that are linked to a particular individual membership.	Yes (Conditional)

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Field Name	Field Description	Mandatory (Yes or No)
	Note: This field appears when the **Individual Membership Details** option is selected from the **Search By** list.	**Note:** If you specify the membership identifier type as a search criteria, you have to enter the membership identifier.
Product LOB	Used to search for accounts of persons that are linked to individual memberships belonging to a particular health product LOB. **Note:** This field appears when the **Individual Membership Details** option is selected from the**Search By** list and the **Advanced Search** link available in the right side of the **Account Selection Criteria** section is clicked. The list includes only those values which are defined in the **PRODUCT_LOB_FLG** lookup field.	No
Product LOB Category	Used to search for accounts of persons that are linked to individual memberships belonging to a particular health product LOB category. The valid values are: • Commercial • Government • State Programs **Note:** This field appears when the **Individual Membership Details** option is selected from the**Search By** list and the **Advanced Search** link available in the right side of the **Account Selection Criteria** section is clicked. The list includes only those values which are defined in the **PRODUCT_LOB_CAT_FLG** lookup field.	No
Person ID	Used to search for accounts where a particular person is the main customer. **Note:** The **Search** (🔍) icon appears corresponding to the **Person ID** field. On clicking the **Search** icon, the **Person Search** window appears. This field appears when the **Person Details** option is selected from the **Search By** list. If you specify the person ID along with any other search criteria, the system gives high precedence to the person ID and ignores the other account selection criteria except **Include Person Hierarchy**.	Yes (Conditional) **Note:** This field is required when the **Include Person Hierarchy** option is selected.

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Field Name	Field Description	Mandatory (Yes or No)
Person Name	Used to search for accounts where the main customer have a particular name. **Note:** This field appears when the **Person Details** option is selected from the **Search By** list.	No
Include Person Hierarchy	Used to indicate whether all the accounts in the person's hierarchy or only the persons' immediate accounts should be kept on hold. Note that the system considers only the child persons and not the grand child persons from the person's hierarchy and then derives the accounts where the child person is the main customer. **Note:** This field appears when the **Person Details** option is selected from the **Search By** list.	No
Policy Type	Used to search for accounts of persons that are linked to policies created using a particular policy type. **Note:** This field appears when the **Policy Details** option is selected from the **Search By** list. The list includes only those policy types which are already defined in the system.	No
Policy Plan Number	Used to search for accounts of persons that are linked to policies having a particular policy plan. **Note:** This field appears when the **Policy Details** option is selected from the **Search By** list.	No
Policy Number	Used to search for accounts of persons that are linked to a particular policy. **Note:** This field appears when the **Policy Details** option is selected from the **Search By** list.	No
Source System	Used to search for accounts of persons that are linked to policies originated from a particular external system. **Note:** This field appears when the **Policy Details** option is selected from the **Search By** list. The list includes only those source systems which are already defined in the system.	No
Status	Used to search for accounts of persons that are linked to policies with a particular status. The valid values are: • Activate • In Force/Active	No

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Field Name	Field Description	Mandatory (Yes or No)
	• Cancel • Canceled • Pending Cancelation • Pending • Pending Reinstatement • Pending Termination • Post Run out • Reinstated • Renewed • Run out • Terminated **Note:** This field appears when the **Policy Details** option is selected from the **Search By** list.	

In addition, the following sub-sections appear in the **Account Selection Criteria** section:

- **Characteristics** - This section appears when the **Account Details**, **Person Details**, or **Policy Details** option is selected from the **Search By** list. Note that in case of the latter option (i.e., **Policy Details**), this section appears only when you click the **Advanced Search** link available in the right side of the **Account Selection Criteria** section. This section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Characteristic Type	Used to search for accounts with a particular type of characteristic. **Note:** The **Search** (🔍) icon appears corresponding to the **Characteristic Type** field. On clicking the **Search** icon, the **Search Characteristic Value** window appears.	Yes (Conditional) **Note:** If you specify the characteristic value as a search criteria, you have to select the characteristic type.
Characteristic Value	Used to search for accounts with a particular characteristic.	Yes (Conditional) **Note:** If you specify the characteristic type as a search criteria, you have to enter the characteristic value.

- **Membership Characteristics** - This section appears when the **Individual Membership Details** option is selected from the **Search By** list and the **Advanced Search** link available in the right side of the **Account Selection Criteria** section is clicked. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Characteristic Type	Used to search for accounts of persons that are linked to individual memberships with a particular type of characteristic. **Note:** The **Search** (🔍) icon appears corresponding to the **Characteristic Type** field. On clicking the **Search** icon, the **Search Characteristic Value** window appears.	Yes (Conditional) **Note:** If you specify the characteristic value as a search criteria, you have to select the characteristic type.

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Field Name	Field Description	Mandatory (Yes or No)
Characteristic Value	Used to search for accounts of persons that are linked to individual memberships with a particular characteristic.	Yes (Conditional) **Note:** If you specify the characteristic type as a search criteria, you have to enter the characteristic value.

- **Health Product Characteristics** - This section appears when the **Individual Membership Details** option is selected from the **Search By** list and the **Advanced Search** link available in the right side of the **Account Selection Criteria** section is clicked. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Characteristic Type	Used to search for accounts of persons that are linked to individual memberships of a health product with a particular type of characteristic. **Note:** The **Search** (🔍) icon appears corresponding to the **Characteristic Type** field. On clicking the **Search** icon, the **Search Characteristic Value** window appears.	Yes (Conditional) **Note:** If you specify the characteristic value as a search criteria, you have to select the characteristic type.
Characteristic Value	Used to search for accounts of persons that are linked to individual memberships of a health product with a particular characteristic.	Yes (Conditional) **Note:** If you specify the characteristic type as a search criteria, you have to enter the characteristic value.

- **Health Plan Characteristics** - This section appears when the **Individual Membership Details** option is selected from the **Search By** list and the **Advanced Search** link available in the right side of the **Account Selection Criteria** section is clicked. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Characteristic Type	Used to search for accounts of persons that are linked to individual memberships of a health plan with a particular type of characteristic. **Note:** The **Search** (🔍) icon appears corresponding to the **Characteristic Type** field. On clicking the **Search** icon, the **Search Characteristic Value** window appears.	Yes (Conditional) **Note:** If you specify the characteristic value as a search criteria, you have to select the characteristic type.
Characteristic Value	Used to search for accounts of persons that are linked to individual memberships of a health plan with a particular characteristic.	Yes (Conditional) **Note:** If you specify the characteristic type as a search criteria, you have to enter the characteristic value.

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> **Note:** You can specify multiple characteristics in the account selection criteria by clicking the **Add** (+) icon corresponding to the **Characteristic Type** field. If you specify multiple characteristics in the account selection criteria, the system uses the **AND** operator to derive the list of accounts that have all the specified characteristics. However, note that you cannot specify more than five characteristics in the account selection criteria.

3. Enter the required search criteria in the **Account Selection Criteria** section.

> **Note:**
>
> You must specify at least one search criterion while defining an account selection criteria for a hold request.
>
> ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.

Related Topics

For more information on...	See...
How to create a hold request	Creating a Hold Request on page 1925

Defining a Person Selection Criteria for a Hold Request

Prerequisites

To define a person selection criteria for a hold request, you should have:

- States defined in the application
- Required characteristic types defined in the application (where the characteristic entity is set to **Person**)

Procedure

To define a person selection criteria for a hold request:

1. Ensure that the **Person Selection Criteria** section is expanded when you are creating or editing a hold request.

> **Note:**
>
> The **Person Selection Criteria** section appears only when the following conditions are met in the **Main** section:
>
> - The **Person** option is selected from the **Entity** list.
> - The **Use Selection Criteria** option is selected. Note that this option appears only when the **Account** or **Person** option is selected from the **Entity** list.

The **Person Selection Criteria** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Person ID	Used to search for a particular person. **Note:** The **Search** (🔍) icon appears corresponding to the **Person ID** field. On clicking the **Search** icon, the **Person Search** window appears.	No
Person Name	Used to search for persons with a particular name.	No

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Field Name	Field Description	Mandatory (Yes or No)
State	Used to search for persons who reside in a particular state. **Note:** The **Search** (🔍) icon appears corresponding to the **State** field. On clicking the **Search** icon, the **State Search** window appears.	No
County	Used to search for persons who reside in a particular county. **Note:** You can specify comma-separated values in this field.	No
Postal	Used to search for persons who reside in an area with a particular postal or zip code. **Note:** You can specify comma-separated values in this field.	No

In addition, the following sub-section appears in the **Person Selection Criteria** section:

- **Characteristics** - This section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Characteristic Type	Used to search for persons with a particular type of characteristic. **Note:** The **Search** (🔍) icon appears corresponding to the **Characteristic Type** field. On clicking the **Search** icon, the **Search Person Characteristic Value** window appears.	Yes (Conditional) **Note:** If you specify the characteristic value as a search criteria, you have to select the characteristic type.
Characteristic Value	Used to search for persons with a particular characteristic.	Yes (Conditional) **Note:** If you specify the characteristic type as a search criteria, you have to enter the characteristic value.

Note: You can specify multiple characteristics in the person selection criteria by clicking the **Add** (+) icon corresponding to the **Characteristic Type** field. If you specify multiple characteristics in the person selection criteria, the system uses the **AND** operator to derive the list of persons that have all the specified characteristics. However, note that you cannot specify more than five characteristics in the person selection criteria.

2. Enter the required search criteria in the **Person Selection Criteria** section.

Note:

You must specify at least one search criterion while defining a person selection criteria for a hold request.

ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.

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Related Topics

For more information on...	See...
How to create a hold request	Creating a Hold Request on page 1925

Adding a Process in a Hold Request

Prerequisites

To add a process in a hold request, you should have:

- Required applicable processes added in the respective hold request type

Procedure

To add a process in a hold request:

1. Ensure that the **Hold Processes** section is expanded when you are creating or editing a hold request.

   The **Hold Processes** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Hold Process	Used to indicate the process that you want to keep on hold. The system then holds the selected process of those entities whose start and end dates fall with the process's start and end dates. **Note:** The list includes only those processes which are selected in the respective hold request type. Depending on the entity level selected, the system enables you to select the following processes: • If the entity level is set to **Account**, you can select the **Auto Pay**, **Bill Generation**, **Delinquency**, **Funding**, **Overdue**, and/or **Refund** option (if available) from the **Hold Process** list. However, note that you cannot select both the **Overdue** and **Delinquency** processes at a time in the hold request. • If the entity level is set to **Person**, you can select the **Bill Generation**, **Delinquency**, and/or **Funding** option (if available) from the **Hold Process** list. • If the entity level is set to **Bill**, you can only select the **Funding** option from the **Hold Process** list. The **Overdue** process is valid for the financial services and health insurance domains but the **Delinquency** process is valid only for the health insurance domain.	Yes
Start Date	Used to specify the date from when the process of an entity is kept on hold.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The hold process start date must be between the hold request start and end dates. The hold process start date cannot be later than the hold process end date. You can either manually specify the date or select it using the **Date Picker** ( ) icon corresponding to the field.	
End Date	Used to specify the date till when the process of an entity is kept on hold. **Note:** The hold process end date must be between the hold request start and end dates. The hold process end date cannot be earlier than the hold process start date. You can either manually specify the date or select it using the **Date Picker** ( ) icon corresponding to the field.	No

2. Enter the required details in the **Hold Processes** section.

Note: You must specify at least one process while creating a hold request.

3. If you want to add more than one process in the hold request, click the **Add** (+) icon and then repeat *s*tep 2.

Note: However, if you want to remove a process from the hold request, click the **Delete** ( ) icon corresponding to the hold process.

Related Topics

For more information on...	See...
How to create a hold request	Creating a Hold Request on page 1925

Defining a Characteristic for a Hold Request

Prerequisites

To define a characteristic for a hold request, you should have:

- Characteristic types defined in the application (where the characteristic entity is set to **Hold Request**)

Procedure

To define a characteristic for a hold request:

1. Ensure that the **Characteristics** section is expanded when you are creating or editing a hold request.

   The **Characteristics** section contains the following fields:

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Field Name	Field Description	Mandatory (Yes or No)
Effective Date	Used to specify the date from when the characteristic is effective for the hold request. **Note:** You can either manually specify the date or select it using the **Date Picker** (icon) corresponding to the field.	Yes (Conditional) **Note:** This field is required when you are defining a characteristic for the hold request.
Characteristic Type	Used to indicate the characteristic type. **Note:** The list includes only those characteristic types where the characteristic entity is set to **Hold Request**.	Yes (Conditional) **Note:** This field is required when you are defining a characteristic for the hold request.
Characteristic Value	Used to specify the value for the characteristic type. **Note:** If you select a predefined characteristic type, the **Search** (icon) appears corresponding to the **Characteristic Value** field. On clicking the **Search** icon, the **Predefined Characteristic Search** window appears. On specifying the value for a predefined characteristic type, the description of the characteristic value appears corresponding to the **Characteristic Value** field.	Yes (Conditional) **Note:** This field is required when you are defining a characteristic for the hold request.

2. Enter the required details in the **Characteristics** section.
3. If you want to define more than one characteristic for the hold request, click the **Add** (+) icon and then repeat *s*tep 2.

Note: However, if you want to remove a characteristic from the hold request, click the **Delete** (icon) corresponding to the characteristic.

Related Topics

For more information on...	See...
How to create a hold request	Creating a Hold Request on page 1925

Viewing the Hold Request Details

Procedure

To view the details of a hold request:

1. Search for the hold request in the **Hold Request** screen.
2. In the **Search Results** section, click the link in the **Hold Request Information** column corresponding to the *h*old request whose details you want to view.

   The **Hold Request** screen appears. It contains following tabs:

   - Hold Request - Main on page 1947
   - Hold Request - Log on page 1966

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3. Ensure that the **Main** tab is selected.
4. View the details of the hold request in the **Hold Request** zone.
5. View the entities (such as persons, accounts, or bills) whose processes are kept on hold through the hold request in the **Hold Entities** zone.

Related Topics

For more information on...	See...
How to search for a hold request	Searching for a Hold Request on page 1924
Hold Request screen	Hold Request (Used for Viewing) on page 1947
Hold Request zone	Hold Request on page 1948
Hold Entities zone	Hold Entities on page 1951

Hold Request (Used for Viewing)

Once you create a hold request, the **Hold Request** screen allows you to:

- View the details of the hold request
- Add entities in the hold request
- Add processes in the hold request
- Edit the details of the hold request
- Edit the entity details of the hold request
- Edit the end dates of all the entities at once in the hold request (mass edit)
- Delete an entity from the hold request
- Delete the hold request
- Discard the hold request (i.e., future dated hold request)
- Submit the hold activation request for approval
- Approve or reject the hold activation request
- Request to resubmit the hold activation request for approval
- Release the hold request
- Approve the hold release request
- Request to resubmit the hold release request for approval
- View the log of the hold request
- Add a log entry for the hold request

This screen consists of the following tabs:

- Hold Request - Main on page 1947
- Hold Request - Log on page 1966

Hold Request - Main

The **Main** tab displays information about the hold request. It contains the following zones:

- Hold Request on page 1948
- Hold Entities on page 1951
- Search Account on page 1953

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Note:

This zone appears when the following conditions are met:

- The **Entity** field in the hold request is set to **Account**
- The status of the hold request is set to **Draft**.

- Search Bill on page 1962

Note:

This zone appears when the following conditions are met:

- The **Entity** field in the hold request is set to **Bill**
- The status of the hold request is set to **Draft**.

- Search Person on page 1964

Note:

This zone appears when the following conditions are met:

- The **Entity** field in the hold request is set to **Person**
- The status of the hold request is set to **Draft**.

Hold Request

The **Hold Request** zone displays the details of the hold request. It contains the following sections:

- **Main** - Displays the basic information about the hold request. It contains the following fields:

Field Name	Field Description
Hold Request Information	Displays information about the hold request.
Hold Request Type	Indicates the hold request type using which the hold request is created. **Note:** It has a link. On clicking the link, the **Hold Request Type** screen appears where you can view the details of the respective hold request type.
Status	Indicates the status of the hold request. The valid values are: • Active • Activation Approval In Progress • Deferred Processing • Discarded • Draft • Entity Derivation Pending • Rejected • Released • Release Approval in Progress • Release Request Approved • Return Release Request to Submitter
Status Reason	Indicates the reason why the hold request is rejected or released.

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Field Name	Field Description
	Note: This field appears when the hold request is in **Rejected** or **Released** status. It has a link. On clicking the link, the **Status Reason** screen appears where you can view the details of the respective status reason.
Start Date	Displays the date from when the hold request is effective.
End Date	Displays the date till when the hold request is effective.
Hold Reason	Indicates the reason why the entity is kept on hold.
Entity	Indicates the type of entity for which the hold request is created. The valid values are: • Account • Bill • Person
Comments	Displays additional information about the hold request. **Note:** This field appears when the comments are provided while adding or editing a hold request.

- **Hold Processes** - Lists the processes which are kept on hold for an entity through the hold request. It contains the following columns:

Column Name	Column Description
Hold Process	Indicates the process which is kept on hold. The valid values are: • Auto Pay • Bill Generation • Delinquency • Funding • Overdue • Refund
Start Date	Displays the date from when the process of an entity is kept on hold.
End Date	Displays the date till when the process of an entity is kept on hold.

- **Characteristics** - Lists the characteristics of the hold request. It contains the following columns:

Column Name	Column Description
Effective Date	Indicates the date from when the characteristic is effective.
Characteristic Type	Indicates the characteristic type.
Characteristic Value	Displays the value of the characteristic type.

- **Record Actions** - Enables you to perform various actions on the hold request. It contains the following buttons:

Button Name	Button Description
Edit	Used to edit the details of the hold request.

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Button Name	Button Description
	Note: The **Edit** button appears when the hold request is in the **Draft** or **Active** status.
Delete	Used to delete the hold request.
	Note: The **Delete** button appears when the hold request is in the **Draft** status.
Submit	Used to submit the hold request.
	Note: The **Submit** button appears when the hold request is in the **Draft** status.
Re Submit	Used to re-submit the hold activation or release request.
	Note: The **Re Submit** button appears when the following conditions are met: • The hold request is in the **Activation Approval In Progress** or **Release Approval in Progress** status. • A user with the approval To Do role is reviewing the hold request.
Approve	Used to approve the hold activation or release request.
	Note: The **Approve** button appears when the following conditions are met: • The hold request is in the **Activation Approval In Progress** or **Release Approval in Progress** status. • A user with the approval To Do role is reviewing the hold request.
Reject	Used to reject the hold activation request.
	Note: The **Reject** button appears when the following conditions are met: • The hold request is in the **Activation Approval In Progress** status. • A user with the approval To Do role is reviewing the hold request.
Release	Used to release the hold request.
	Note: The **Release** button appears when the hold request is in the **Active** status.
Discard	Used to discard the future dated hold request.
	Note: The **Discard** button appears when the following conditions are met: • The hold request is future dated (i.e. when the hold request start date is later than the system date). • The hold request is in the **Active** status.

- **Record Information** - This section contains the following fields:

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Field Name	Field Description
Business Object	Indicates the business object using which the hold request is created. In addition, a context menu (⊙) icon appears corresponding to this field which helps in navigating to other screens in the application. **Note:** It has a link. On clicking the link, the **Business Object** screen appears where you can view the details of the respective business object.
Status Date/Time	Displays the date and time when the hold request status is updated.
Create Date/Time	Displays the date and time when the hold request is created.

Related Topics

For more information on...	See...
How to edit a hold request	Editing a Hold Request on page 1969
How to delete a hold request	Deleting a Hold Request on page 1976
How to submit a hold activation request	Submitting a Hold Activation Request on page 1977
How to re-submit a hold activation request	Requesting to Resubmit a Hold Activation Request for Approval on page 1987
How to approve a hold activation request	Approving a Hold Activation Request on page 1981
How to reject a hold activation request	Rejecting a Hold Activation Request on page 1985
How to release a hold request	Approving a Hold Release Request on page 1991
How to discard a hold request	Discarding a Hold Request on page 1976

Hold Entities

The **Hold Entities** zone lists the entities which are added in the hold request. It contains the following columns:

Column Name	Column Description
Person Information	Displays information about the person. In addition, this column has a context menu (⊙) icon which helps in navigating to other screens in the application. **Note:** It has a link. On clicking the link, the **Person** screen appears where you can view the details of the respective person. This column appears when the entity level in the hold request is set to **Person**.
Account Information	Displays information about the account. In addition, this column has a context menu (⊙) icon which helps in navigating to other screens in the application.

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Column Name	Column Description
	Note: It has a link. On clicking the link, the **Account** screen appears where you can view the details of the respective account. This column appears when the entity level in the hold request is set to **Account**.
Bill Information	Displays information about the bill. In addition, this column has a context menu (⊙) icon which helps in navigating to other screens in the application.
	Note: It has a link. On clicking the link, the **Bill** screen appears where you can view the details of the respective bill. This column appears when the entity level in the hold request is set to **Bill**.
Entity ID	Indicates the entity which is kept on hold through the hold request.
Start Date	Displays the date from when the entity is on hold.
End Date	Displays the date till when the entity is on hold.
	Note: Once the hold request is either manually or automatically released, the system updates the hold entity end date to the system date.
Hold Amount	Displays the bill amount which is kept on hold through the hold request.
	Note: This column appears when the entity level in the hold request is set to **Bill**.
Bill After Date	Displays the date after which bills can be generated for the account.
	Note: This column appears when the entity level in the hold request is set to **Account**. Once the hold request is either manually or automatically released, the bill after date is cleared (i.e., set to NULL) for the respective account.
Postpone Credit Review Until	Displays the date after which overdue debt can be monitored for the entity either through the **Overdue** or **Delinquency Management** process.
	Note: This column appears when the entity level in the hold request is set to **Account** or **Person**.
Defer Auto Pay Date	Displays the date till when you want to hold the automatic payment process for the account.
	Note: This column appears when the entity level in the hold request is set to **Account**.
Hierarchy	Indicates whether all the accounts in the person's hierarchy or only the persons' immediate accounts should be kept on hold through the hold request. The valid values are: • Y

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Column Name	Column Description
	• N
	Note: This column appears when the entity level in the hold request is set to **Person**. The system considers only the child persons and not the grand child persons from the person's hierarchy and then derives the accounts where the child person is the main customer.
Hold Refund Until	Displays the date after which the refund request can be processed for the account.
	Note: This column appears when the entity level in the hold request is set to **Account**. The system does not stop you from creating A/P adjustments for an account from the **Adjustment** screen when the refund process is kept on hold for the account.

In addition, this zone contains the following buttons:

Button Name	Button Description
Edit	Used to edit the details of the hold entity.
Delete	Used to delete the hold entity from the hold request.

Note:

The **Edit** and **Delete** buttons appear only when the hold request is in the **Draft** or **Active** status.

A check box appears corresponding to each hold entity. To update the details of a hold entity, select the check box corresponding to the hold entity and then click the **Edit** button. You can also select multiple hold entities at the same time. In addition, you can select the check box corresponding to the column header. This allows you to update the details of all the hold entities listed in the respective page. For more information, see Editing the Entity Details of a Hold Request on page 1971.

You can also mass update the end date of the hold entities in a hold request at once by clicking the **Edit All** link available in the upper right corner of this zone. The link appears only when the hold request is in the **Draft** or **Active** status. For more information, see Updating the End Date of All the Hold Entities (Mass Edit) on page 1973.

To delete a hold entity, select the check box corresponding to the hold entity and click the **Delete** button. You can also select multiple hold entities at the same time. In addition, you can select the check box corresponding to the column header. This allows you to delete all the hold entities listed in the respective page. For more information, see Deleting an Entity from a Hold Request on page 1975.

You can filter the list using the **Entity ID** field available in the **Filter** area. By default, the **Filter** area is hidden. You can view the **Filter** area by clicking the **Filters** (▽) icon in the upper right corner of this zone.

Search Account

The **Search Account** zone allows you to search for accounts using various search criteria. It also allows you to add the accounts in the hold request. It appears when the following conditions are met:

- The **Entity** field in the hold request is set to **Account**
- The status of the hold request is set to **Draft**.

It contains the following two sections:

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- **Search Criteria** - The **Search Criteria** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Search By	Used to indicate whether you want to search for an account using the account, policy, or individual membership details. The valid values are: • Account Details • Policy Details • Individual Membership Details **Note:** By default, the **Account Details** option is selected. The **Individual Membership Details** and **Policy Details** options appear in the **Search By** list only when the **Environment Type** option type of the **SYSDT** feature configuration is set to **H**. For more information, see Setting the SYSDT Feature Configuration on page 1890.	Yes
Account ID	Used to search for a particular account. **Note:** This field appears when the **Account Details** option is selected from the **Search By** list. The **Search** (🔍) icon appears corresponding to the **Account ID** field. On clicking the **Search** icon, the **Account Search** window appears. On selecting the account, the respective information string appears corresponding to the **Account ID** field. It has a link. On clicking the link, the **Account** screen appears where you can view the details of the respective account.	No
Division	You can use this field while searching for an account using the account or individual membership details. The context of this field changes depending on the respective option selected from the **Search By** list: • **Account Details** - This field enables you to search for accounts which belong to a particular division. • **Individual Membership Details** - This field enables you to search for individual membership's member persons' accounts that belong to a particular division. **Note:** This field appears when the **Account Details** or**Individual Membership Details** option is selected from the **Search By** list. The list includes only those divisions which are already defined in the system.	No

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Field Name	Field Description	Mandatory (Yes or No)
Address Source	Used to search for accounts where a particular address source is used to route the account's bills and/or quotes via the postal service. The valid values are: • Account Override • Bill • Main • Multiple Account Override • Person **Note:** This field appears when the **Account Details** option is selected from the **Search By** list. The list includes only those values which are defined in the **BILL_ADDR_SRCE_FLG** lookup field.	Yes (Conditional) **Note:** This field is required when the search criteria is specified in the **State**, **County**, or **Postal** field.
Bill Cycle	Used to search for accounts with a particular bill cycle. **Note:** This field appears when the **Account Details** option is selected from the **Search By** list. The list includes only those bill cycles which are already defined in the system.	No
State	You can use this field while searching for an account using the account, policy, or individual membership details. The context of this field changes depending on the respective option selected from the **Search By** list: • **Account Details** - This field enables you to search for accounts whose billing address belongs to a particular state. • **Policy Details** - This field enables you to search for accounts of persons that are linked to policies issued in a particular state. • **Individual Membership Details** - This field enables you to search for accounts that belong to the individual membership's member persons who resides in a particular state. **Note:** The **Search** (🔍) icon appears corresponding to the **State** field. On clicking the **Search** icon, the **State Search** window appears.	No
Customer Class	You can use this field while searching for an account using the account or individual membership details. The context of this field changes depending on the respective option selected from the **Search By** list: • **Account Details** - This field enables you to search for accounts which belong to a particular customer class.	No

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Field Name	Field Description	Mandatory (Yes or No)
	• **Individual Membership Details** - This field enables you to search for individual membership's member persons' accounts that belong to a particular customer class. **Note:** This field appears when the **Account Details** or **Individual Membership Details** option is selected from the **Search By** list. The list includes only those customer classes which are already defined in the system.	
County	You can use this field while searching for an account using the account, policy, or individual membership details. The context of this field changes depending on the respective option selected from the **Search By** list: • **Account Details** - This field enables you to search for accounts whose billing address belongs to a particular county. • **Policy Details** - This field enables you to search for accounts of persons that are linked to policies issued in a particular county. • **Individual Membership Details** - This field enables you to search for accounts that belong to the individual membership's member persons who resides in a particular county. **Note:** You can specify comma-separated values in this field.	No
Postal	You can use this field while searching for an account using the account, policy, or individual membership details. The context of this field changes depending on the respective option selected from the **Search By** list: • **Account Details** - This field enables you to search for accounts whose billing address belongs to a specific postal or zip code. • **Policy Details** - This field enables you to search for accounts of persons that are linked to policies issued in an area with a particular postal or zip code. • **Individual Membership Details** - This field enables you to search for accounts that belong to the individual membership's member persons who resides in an area with a particular postal or zip code. **Note:** You can specify comma-separated values in this field.	No
Price Item	Used to search for accounts for which charges of a particular price item are created.	No

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Field Name	Field Description	Mandatory (Yes or No)
	Note: This field appears when the **Policy Details** option is selected from the **Search By** list. The **Search** (🔍) icon appears corresponding to the **Price Item** field. On clicking the **Search** icon, the **Price Item Search** window appears.	
Policy Plan Number	Used to search for accounts of persons that are linked to policies having a particular policy plan. **Note:** This field appears when the **Policy Details** option is selected from the **Search By** list.	No
Policy Type	Used to search for accounts of persons that are linked to policies created using a particular policy type. **Note:** This field appears when the **Policy Details** option is selected from the **Search By** list. The list includes only those policy types which are already defined in the system.	Yes (Conditional) **Note:** This field is required if you are searching for accounts using the state, county, postal, start date, or end date as a search criteria.
Source System	Used to search for accounts of persons that are linked to policies originated from a particular external system. **Note:** This field appears when the **Policy Details** option is selected from the **Search By** list. The list includes only those source systems which are already defined in the system.	Yes (Conditional) **Note:** This field is required if you are searching for accounts using the state, county, postal, start date, or end date as a search criteria.
Policy Number	Used to search for accounts of persons that are linked to a particular policy. **Note:** This field appears when the **Policy Details** option is selected from the **Search By** list.	No
Start Date	You can use this field while searching for an account using the policy or individual membership details. The context of this field changes depending on the respective option selected from the **Search By** list: • **Policy Details** - This field enables you to search for accounts of persons that are linked to policies with a particular start date. • **Individual Membership Details** - This field enables you to search for accounts of persons that are linked to individual memberships with a particular start date.	No

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Field Name	Field Description	Mandatory (Yes or No)
	Note: This field appears when the **Individual Membership Details** or **Policy Details** option is selected from the **Search By** list. You can either manually specify the date or select it using the **Date Picker** ( ) icon corresponding to the field.	
End Date	You can use this field while searching for an account using the policy or individual membership details. The context of this field changes depending on the respective option selected from the **Search By** list: • **Policy Details** - This field enables you to search for accounts of persons that are linked to policies with a particular end date. • **Individual Membership Details** - This field enables you to search for accounts of persons that are linked to individual memberships with a particular end date. **Note:** This field appears when the **Individual Membership Details** or **Policy Details** option is selected from the **Search By** list. You can either manually specify the date or select it using the **Date Picker** ( ) icon corresponding to the field.	No
Status	Used to search for accounts of persons that are linked to policies with a particular status. The valid values are: • In Force/Active • Cancel • Canceled • Pending Cancelation • Pending • Pending Reinstatement • Pending Termination • Post Run out • Reinstated • Run out • Terminated **Note:** This field appears when the **Policy Details** option is selected from the **Search By** list.	No
Health Plan	Used to search for accounts of persons that are linked to individual memberships of a particular health plan.	No

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Field Name	Field Description	Mandatory (Yes or No)
	Note: This field appears when the **Individual Membership Details** option is selected from the **Search By** list. You must specify a health plan which is already defined in the system.	
Membership Identifier Type	Used to search for accounts of persons that are linked to individual memberships using a particular membership identifier type. **Note:** This field appears when the **Individual Membership Details** option is selected from the **Search By** list. The list includes only those membership identifier types which are already defined in the system.	Yes (Conditional) **Note:** If you specify the membership identifier as a search criteria, you have to select the membership identifier type.
Membership Identifier	Used to search for accounts of persons that are linked to a particular individual membership. **Note:** This field appears when the **Individual Membership Details** option is selected from the **Search By** list.	Yes (Conditional) **Note:** If you specify the membership identifier type as a search criteria, you have to enter the membership identifier.
Product Type	Used to search for accounts of persons that are linked to individual memberships of a particular health product type. The valid values are: • Exclusive Provider Organization • Health Maintenance Organization • Point-of-Service Plan • Preferred Provider Organization **Note:** This field appears when the **Individual Membership Details** option is selected from the **Search By** list. The list includes only those values which are defined in the **PRODUCT_TYPE_FLG** lookup field.	No
Product Category	Used to search for accounts of persons that are linked to individual memberships of a particular health product category. The valid value is: • Medical	No

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Field Name	Field Description	Mandatory (Yes or No)
	Note: This field appears when the **Individual Membership Details** option is selected from the **Search By** list. The list includes only those values which are defined in the **PRODUCT_HC_CAT_FLG** lookup field.	
Product LOB	Used to search for accounts of persons that are linked to individual memberships belonging to a particular health product LOB. **Note:** This field appears when the **Individual Membership Details** option is selected from the**Search By** list. The list includes only those values which are defined in the **PRODUCT_LOB_FLG** lookup field.	No
Product LOB Category	Used to search for accounts of persons that are linked to individual memberships belonging to a particular health product LOB category. The valid values are: • Commercial • Government • State Programs **Note:** This field appears when the **Individual Membership Details** option is selected from the**Search By** list. The list includes only those values which are defined in the **PRODUCT_LOB_CAT_FLG** lookup field.	No
Characteristic Type	You can use this field while searching for an account using the account, individual membership, or policy details. The context of this field changes depending on the respective option selected from the **Search By** list: • **Account Details** - This field enables you to search for accounts with a particular type of characteristic. Here, the system lists those characteristic types where the characteristic entity is set to **Account**. • **Individual Membership Details** - This field enables you to search for member persons' accounts of the individual memberships with a particular type of characteristic. Here, the system lists those characteristic types where the characteristic entity is set to **Membership**. • **Policy Details** - This field enables you to search for policy persons' accounts of the policies with a particular type of characteristic. Here, the system lists those characteristic types where the characteristic entity is set to **Policy**.	Yes (Conditional) **Note:** If you specify the characteristic value as a search criteria, you have to select the characteristic type.

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Field Name	Field Description	Mandatory (Yes or No)
Characteristic Value	You can use this field while searching for an account using the account, individual membership, or policy details. The context of this field changes depending on the respective option selected from the **Search By** list: • **Account Details** - This field enables you to search for accounts with a particular characteristic. • **Individual Membership Details** - This field enables you to search for member persons' accounts of the individual memberships with a particular characteristic. • **Policy Details** - This field enables you to search for policy persons' accounts of the policies with a particular characteristic. **Note:** This field appears when you select an option from the **Characteristic Type** list.	Yes (Conditional) **Note:** If you specify the characteristic type as a search criteria, you have to enter the characteristic value.

Note: You must specify at least one search criterion while searching for an account.

- **Search Results** - On clicking the **Search** button, the search results appear based on the specified search criteria. The **Search Results** section contains the following columns:

Column Name	Column Description
Account Information	Displays additional information about the account. In addition, this column has a context menu (⊙) icon which helps in navigating to other screens in the application. **Note:** It has a link. On clicking the link, the **Account** screen appears where you can view the details of the respective account.
Country	Displays the country in which the account's main customer resides.
State	Displays the state where the county is located.
County	Displays the county name.
Postal	Displays the postal or zip code of the address.
Customer Class	Indicates the customer class to which the account belongs.
Division	Indicates the division to which the account belongs.
Account ID	Displays the account ID.

Note: Pagination is used to display limited number of records in the **Search Results** section. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

In addition, this section contains the following button:

Button Name	Button Description
Add	Used to add an account to the hold request.

A check box appears corresponding to each account. On selecting the check box, you can add the account to the hold request. You can also select multiple accounts at the same time. In addition, you can select the check box

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corresponding to the column header. This allows you to add all the accounts listed in the respective page to the hold request.

Note: The **Export** option is available in the **Explorer Zone** menu. On clicking the **Export** option, you can extract the search results in the CSV format. Two additional columns named **Account Identifier Type** and **Account Identifier** appear in the CSV file apart from the columns listed above in the **Search Results** section.

Related Topics

For more information on...	See...
How to add an account in a hold request	Adding an Account in a Hold Request on page 1967

Search Bill

The **Search Bill** zone allows you to search for bills using various search criteria. It also allows you to add the bills in the hold request. It appears when the following conditions are met:

- The **Entity** field in the hold request is set to **Bill**
- The status of the hold request is set to **Draft**.

It contains the following two sections:

- **Search Criteria** - The **Search Criteria** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Search By	Used to indicate whether you want to search for a bill using the bill details. The valid value is: • Bill Details **Note:** By default, the **Bill Details** option is selected.	Yes
Bill ID	Used to search for a particular bill. **Note:** The **Search** (🔍) icon appears corresponding to the **Bill ID** field. On clicking the **Search** icon, the **Bill Search** window appears. On selecting the bill, the respective information string appears corresponding to the **Bill ID** field. It has a link. On clicking the link, the **Bill** screen appears where you can view the details of the respective bill.	No
Alternate Bill ID	Used to search for a bill using its alternate bill ID.	No
Address Source	Used to search for bills which are routed using a particular address source. The valid values are: • Account Override • Bill • Main • Multiple Account Override • Person	Yes (Conditional) **Note:** This field is required if you are searching for bills using the state, country, or postal as a search criteria.

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The list includes only those values which are defined in the **BILL_ADDR_SRCE_FLG** lookup field.	
Bill Date From	Used to search for bills which are completed on or after the specified date. **Note:** By default, the current date appears in this field. You can either manually specify the date or select it using the **Date Picker** ( ) icon corresponding to the field.	Yes (Conditional) **Note:** This field is required if you have specified the value in the **To** field.
State	Used to search for bills where billing address belongs to a particular state. **Note:** The **Search** ( ) icon appears corresponding to the **State** field. On clicking the **Search** icon, the **State Search** window appears.	No
To	Used to search for bills which are completed on or before the specified date. **Note:** By default, the current date appears in this field. You can either manually specify the date or select it using the **Date Picker** ( ) icon corresponding to the field.	Yes (Conditional) **Note:** This field is required if you have specified the value in the **Bill Date From** field.
County	Used to search for bills where billing address belongs to a particular county.	No
Show All Bills	Used to indicate whether you want to search for all the bills or only the non-zero bills. **Note:** By default, this option is not selected and as a result, only the non-zero bills that meet the search criteria appears in the search results. However, if you select the **Show All Bills** option, the system lists all the bills including zero amount bills that meet the search criteria in the **Search Results** section.	No
Postal	Used to search for bills where billing address belongs to a particular postal or zip code.	No

Note:

You must specify at least one search criterion while searching for a bill.

The number of days between Bill From Date and Bill To Date should not exceed 60 days.

- **Search Results** - On clicking the **Search** button, the search results appear based on the specified search criteria. The **Search Results** section contains the following columns:

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Column Name	Column Description
Bill Information	Displays additional information about the bill. In addition, this column has a context menu (⊙) icon which helps in navigating to other screens in the application.
	Note: It has a link. On clicking the link, the **Bill** screen appears where you can view the details of the respective bill.
Account Information	Indicates the account for which the bill is created. In addition, this column has a context menu (⊙) icon which helps in navigating to other screens in the application.
	Note: It has a link. On clicking the link, the **Account** screen appears where you can view the details of the respective account.
Country	Displays the country to which the bill is routed via the postal service.
State	Displays the state where the county is located.
County	Displays the county name.
Postal	Displays the postal or zip code of the address.
Entity ID	Displays the bill ID.

In addition, this section contains the following button:

Button Name	Button Description
Add	Used to add a bill to the hold request.

A check box appears corresponding to each bill. On selecting the check box, you can add the bill to the hold request. You can also select multiple bills at the same time. In addition, you can select the check box corresponding to the column header. This allows you to add all the bills listed in the respective page to the hold request.

Note: The **Export** option is available in the **Explorer Zone** menu. On clicking the **Export** option, you can extract the search results in the CSV format. One additional column named **Account ID** appears in the CSV file apart from the columns listed above in the **Search Results** section.

Related Topics

For more information on...	See...
How to add a bill in a hold request	Adding a Bill in a Hold Request on page 1968

Search Person

The **Search Person** zone allows you to search for persons using various search criteria. It also allows you to add the persons in the hold request. It appears when the following conditions are met:

- The **Entity** field in the hold request is set to **Person**
- The status of the hold request is set to **Draft**.

It contains the following two sections:

- **Search Criteria** - The **Search Criteria** section contains the following fields:

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Field Name	Field Description	Mandatory (Yes or No)
Search By	Used to indicate whether you want to search for a person using the person details. The valid value is: • Person Details **Note:** By default, the **Person Details** option is selected.	Yes
Person ID	Used to search for a particular person. **Note:** The **Search** (🔍) icon appears corresponding to the **Person ID** field. On clicking the **Search** icon, the **Person Search** window appears. On selecting the person, the respective information string appears corresponding to the **Person ID** field. It has a link. On clicking the link, the **Person** screen appears where you can view the details of the respective person.	No
County	Used to search for persons who reside in a particular county.	No
State	Used to search for persons who reside in a particular state.	No
Postal	Used to search for persons who reside in an area with a particular postal or zip code.	No

Note: You must specify at least one search criterion while searching for a person.

- **Search Results** - On clicking the **Search** button, the search results appear based on the specified search criteria. The **Search Results** section contains the following columns:

Column Name	Column Description
Person Information	Displays additional information about the person. In addition, this column has a context menu (⊙) icon which helps in navigating to other screens in the application. **Note:** It has a link. On clicking the link, the **Person** screen appears where you can view the details of the respective person.
Person Identifier Type	Indicates the primary person identifier type.
Person Identifier	Displays the value of the primary person identifier type.
Country	Indicates the country where the person resides.
State	Displays the state where the county is located.
County	Displays the county name.
Postal	Displays the postal or zip code of the address.
Entity ID	Displays the person ID.

Note: Pagination is used to display limited number of records in the **Search Results** section. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

In addition, this section contains the following button:

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Button Name	Button Description
Add	Used to add a person to the hold request.

A check box appears corresponding to each person. On selecting the check box, you can add the person to the hold request. You can also select multiple persons at the same time. In addition, you can select the check box corresponding to the column header. This allows you to add all the persons listed in the respective page to the hold request.

Note: The **Export** option is available in the **Explorer Zone** menu. On clicking the **Export** option, you can extract the search results in the CSV format. One additional column named **Person Name** appears in the CSV file apart from the columns listed above in the **Search Results** section.

Related Topics

For more information on...	See...
How to add a person in a hold request	Adding a Person in a Hold Request on page 1967

Hold Request - Log

The **Log** tab contains the following zone:

- Hold Request Log on page 1966

Hold Request Log

The **Hold Request Log** zone lists the complete trail of actions performed on the hold request. It contains the following columns:

Column Name	Column Description
Creation Date Time	Displays the date and time when the action was performed on the hold request.
Details	Displays the details about the action performed on the hold request.
User	Indicates the user who has performed the action on the hold request.
Log Type	Indicates the type of log.
Related Object	Indicates the object or entity which is created when the action is performed on the hold request. **Note:** At present, no data appears in this column. The implementation team can build the custom logic to meet the business requirements.
Status Reason	Indicates the reason why the hold request is rejected or released.

Note: You can manually add a log entry for the hold request by clicking the **Add Log Entry** link in the upper right corner of the **Hold Request Log** zone.

Related Topics

For more information on...	See...
How to view the log of a hold request	Viewing the Log of a Hold Request on page 1995
How to add a log entry for a hold request	Adding a Log Entry for a Hold Request on page 1996

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Adding a Person in a Hold Request

Prerequisites

To add a person in a hold request, you should have:

- States defined in the application

Procedure

To add a person in a hold request:

1. Search for the draft hold request in the **Hold Request** screen where you want to add another person.
2. In the **Search Results** section, click the link in the **Hold Request Information** column corresponding to the *h*old request whose details you want to edit.
   The **Hold Request** screen appears.
3. Expand the **Search Person** zone.
4. Enter the search criteria in the **Search Person** zone.

> **Note:** ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.

5. Click **Search**.
   A list of persons that meet the search criteria appears in the **Search Results** section.
6. Select the check box corresponding to the person that you want to add in the hold request.

> **Note:** You can also select multiple persons at the same time. In addition, you can select the check box corresponding to the column header. This allows you to add all the persons listed in the respective page to the hold request.

7. Click the **Add** button in the **Search Person** zone.
   A message appears indicating that the selected person is successfully added in the hold request. Note that the person is added in the **Hold Entities** zone.

> **Note:** You cannot add a person in a hold request when it is created through the **Upload Request** feature.

Related Topics

For more information on...	**See...**
How to search for a hold request	Searching for a Hold Request on page 1924
How to create a hold request	Creating a Hold Request on page 1925
Hold Request screen	Hold Request (Used for Viewing) on page 1947
Search Person zone	Search Person on page 1964
Hold Entities zone	Hold Entities on page 1951

Adding an Account in a Hold Request

Prerequisites

To add an account in a hold request, you should have:

- Divisions, bill cycles, customer classes, states, health plans, membership identifier types, and policy types defined in the application

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- Values defined in the **BILL_ADDR_SRCE_FLG**, **PRODUCT_TYPE_FLG**, **PRODUCT_HC_CAT_FLG**, **PRODUCT_LOB_FLG**, and **PRODUCT_LOB_CAT_FLG** lookup fields
- Required characteristic types defined in the application (where the characteristic entity is set to **Account**)
- Required characteristic types defined in the application (where the characteristic entity is set to **Membership**)
- Required characteristic types defined in the application (where the characteristic entity is set to **Policy**)

Procedure

To add an account in a hold request:

1. Search for the draft hold request in the **Hold Request** screen where you want to add another account.
2. In the **Search Results** section, click the link in the **Hold Request Information** column corresponding to the *h*old request whose details you want to edit.
   The **Hold Request** screen appears.
3. Expand the **Search Account** zone.
4. Enter the search criteria in the **Search Account** zone.

> **Note:** ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.

5. Click **Search**.
   A list of accounts that meet the search criteria appears in the **Search Results** section.
6. Select the check box corresponding to the account that you want to add in the hold request.

> **Note:** You can also select multiple accounts at the same time. In addition, you can select the check box corresponding to the column header. This allows you to add all the accounts listed in the respective page to the hold request.

7. Click the **Add** button in the **Search Account** zone.
   A message appears indicating that the selected account is successfully added in the hold request. Note that the account is added in the **Hold Entities** zone.

> **Note:** You cannot add an account in a hold request when it is created through the **Upload Request** feature.

Related Topics

For more information on...	**See...**
How to search for a hold request	Searching for a Hold Request on page 1924
How to create a hold request	Creating a Hold Request on page 1925
Hold Request screen	Hold Request (Used for Viewing) on page 1947
Search Account zone	Search Account on page 1953
Hold Entities zone	Hold Entities on page 1951

Adding a Bill in a Hold Request

Prerequisites

To add a bill in a hold request, you should have:

- States defined in the application
- Values defined in the **BILL_ADDR_SRCE_FLG** lookup field

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Procedure

To add a bill in a hold request:

1. Search for the draft hold request in the **Hold Request** screen where you want to add another bill.
2. In the **Search Results** section, click the link in the **Hold Request Information** column corresponding to the *h*old request whose details you want to edit.
   The **Hold Request** screen appears.
3. Expand the **Search Bill** zone.
4. Enter the search criteria in the **Search Bill** zone.

> **Note:** ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.

5. Click **Search**.
   A list of bills that meet the search criteria appears in the **Search Results** section.
6. Select the check box corresponding to the bill that you want to add in the hold request.

> **Note:** You can also select multiple bills at the same time. In addition, you can select the check box corresponding to the column header. This allows you to add all the bills listed in the respective page to the hold request.

7. Click the **Add** button in the **Search Bill** zone.
   A message appears indicating that the selected bill is successfully added in the hold request. Note that the bill is added in the **Hold Entities** zone.

> **Note:**
>
> You cannot add a bill in the hold request if its outstanding amount is zero.
>
> You cannot add a bill in a hold request when it is created through the **Upload Request** feature.

Related Topics

For more information on...	**See...**
How to search for a hold request	Searching for a Hold Request on page 1924
How to create a hold request	Creating a Hold Request on page 1925
Hold Request screen	Hold Request (Used for Viewing) on page 1947
Search Bill zone	Search Bill on page 1962
Hold Entities zone	Hold Entities on page 1951

Editing a Hold Request

Prerequisites

To edit a hold request, you should have:

- Values defined in the **HOLD_REASON_FLG** lookup field

Procedure

To edit a hold request:

1. Search for the hold request in the **Hold Request** screen.

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2. In the **Search Results** section, click the link in the **Hold Request Information** column corresponding to the *h*old request whose details you want to edit.
   The **Hold Request** screen appears.
3. Ensure that the **Main** tab is selected.
4. Click the **Edit** button in the **Hold Request** zone.

   The **Hold Request** screen appears. It contains the following sections:

   - **Main** - Used to specify the basic details for the hold request.
   - **Hold Processes** - Used to indicate one or more processes of the entity that you want to keep on hold for a particular period.
   - **Characteristics** - Used to define the characteristics for the hold request.

   The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Hold Request Information	Displays information about the hold request.	Not applicable
Hold Request Type	Indicates the hold request type using which the hold request is created.	Not applicable
Start Date	Displays the date from when the hold request is effective.	Not applicable
End Date	Used to specify the date till when the hold request is effective. **Note:** The hold request end date cannot be earlier than the hold request start date. You can either manually specify the date or select it using the **Date Picker** ( ) icon corresponding to the field. You must specify a date which is equal to or later than the system date.	Yes
Hold Reason	Used to indicate the reason why you want to hold the entity. **Note:** The list includes only those values which are defined in the **HOLD_REASON_FLG** lookup field. You cannot change the hold reason when the hold request is in the **Active** status.	Yes
Entity	Indicates the type of entity for which the hold request is created. The valid values are: • Account • Bill • Person	Not applicable

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Field Name	Field Description	Mandatory (Yes or No)
Comments	Used to specify additional information about the hold request. **Note:** You can resize the text box depending on your requirement by clicking the **Resize Handle** ( ) icon at the bottom right corner of the text box.	No

Note: The **Edit** button appears when the hold request is in the **Draft** or **Active** status.

5. Modify the required details in the **Main** section.
6. Add or remove the hold processes from the hold request, if required.

Note:

You cannot delete a process or modify the details of a process except the end date when the hold request is in the **Active** status. Note that you cannot specify a date which is earlier than the system date.

A new process is added with the start date later than or equal to the system date.

You cannot change the past end date of an entity or process in the hold request.

You cannot add or remove a hold process from the hold request when it is created through the **Upload Request** feature.

7. Define, edit, or remove characteristics of the hold request, if required.
8. Click **Save**.
   The changes made to the hold request are saved.

Related Topics

For more information on...	See...
How to search for a hold request	Searching for a Hold Request on page 1924
Hold Request screen	Hold Request (Used for Viewing) on page 1947
Hold Request zone	Hold Request on page 1948
How to add a process in a hold request	Adding a Process in a Hold Request on page 1944
How to define a characteristic for a hold request	Defining a Characteristic for a Hold Request on page 1945

Editing the Entity Details of a Hold Request

Procedure

To edit the entity details of a hold request:

1. Search for the hold request in the **Hold Request** screen.
2. In the **Search Results** section, click the link in the **Hold Request Information** column corresponding to the *h*old request whose details you want to edit.
   The **Hold Request** screen appears.
3. Select the check box corresponding to the hold entity that you want to edit in the **Hold Entities** zone.

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Note: You can also select multiple hold entities at the same time. In addition, you can select the check box corresponding to the column header. This allows you to update the details of all the hold entities listed in the respective page.

4. Click **Edit**.

The **Edit Hold Request Entities** screen appears. It contains the following fields:

Field Name	Field Description
Hold Request Information	Displays information about the hold request.
Start Date	Displays the date from when the hold request is effective.
End Date	Displays the date till when the hold request is effective.

In addition, this screen contains the following columns:

Column Name	Column Description	Mandatory (Yes or No)
Entity ID	Displays the entity ID.	Not applicable
Entity Information	Displays the information about the entity.	Not applicable
Start Date	Used to specify the date from when you want to hold the entity. **Note:** This field is editable only when the hold request is in the **Draft** status. The hold entity start date must be between the hold request start and end dates and between at least one process's start and end dates. The hold entity start date cannot be later than the hold entity end date. You can either manually specify the date or select it using the **Date Picker** ( ) icon corresponding to the field.	Yes
End Date	Used to specify the date till when you want to hold the entity. **Note:** The hold entity end date must be between hold request start and end dates and between at least one process's start and end dates. The hold entity end date cannot be earlier than the hold entity start date or system date. You cannot update a past dated end date of a hold entity. You can either manually specify the date or select it using the **Date Picker** ( ) icon corresponding to the field.	No
Hold Amount	Used to specify the outstanding bill amount that you want to keep on hold.	Yes

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Column Name	Column Description	Mandatory (Yes or No)
	Note: This column appears when the **Bill** option is selected from the **Entity** list. This field is editable only when the **Allow Partial Hold for Bill** option is selected in the respective hold request type. You must specify a non-zero value in this field and the specified amount should not exceed the outstanding bill amount.	
Hierarchy	Used to indicate whether all the accounts in the person's hierarchy or only the persons' immediate accounts should be kept on hold. Note that the system considers only the child persons and not the grand child persons from the person's hierarchy and then derives the accounts where the child person is the main customer.	No
	Note: This column appears when the **Person** option is selected from the **Entity** list. This column is editable only when the hold request is in the **Draft** status.	

Note: The **Edit** button appears when the hold request is in the **Draft** or **Active** status.

5. Modify the details of the hold entities, if required.
6. Click **Save**.
   The changes made to the hold request are saved.

Note: After updating the end date of a hold entity, you need to execute the **Hold Request Monitor** (**C1-HLMON**) batch. On executing the batch, the system will accordingly update the bill after date, postpone credit review until date, defer auto pay date, and hold refund until date, if required, for the respective entity.

Related Topics

For more information on...	See...
How to search for a hold request	Searching for a Hold Request on page 1924
Hold Request screen	Hold Request (Used for Viewing) on page 1947
Hold Entities zone	Hold Entities on page 1951

Updating the End Date of All the Hold Entities (Mass Edit)

Procedure

To update the end date of all the hold entities at once in a hold request:

1. Search for the hold request in the **Hold Request** screen.

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2. In the **Search Results** section, click the link in the **Hold Request Information** column corresponding to the *h*old request whose details you want to edit.
   The **Hold Request** screen appears.
3. Click the **Edit All** link available in the upper right corner of the **Hold Entities** zone.

   The **Hold Request Information** screen appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Start Date	Displays the date from when the hold request is effective.	Not applicable
End Date	Displays the date till when the hold request is effective.	Not applicable
Hold Entity End Date	Used to specify the date till when you want to hold all the entities in the hold request. **Note:** The hold entity end date must be between hold request start and end dates and between at least one process's start and end dates. The hold entity end date cannot be earlier than the hold entity start date or system date. You cannot update a past dated end date of a hold entity. You can either manually specify the date or select it using the **Date Picker** ( ) icon corresponding to the field.	Yes

Note: The **Edit All** link appears when the hold request is in the **Draft** or **Active** status.

4. Enter the required date in the **Hold Entity End Date** field.
5. Click **Save**.

   The end date of the hold entities, hold processes, and the hold request is set to the specified date. For example, a hold request exists with the following hold processes and hold entities:

	Original Start Date	Original End Date
Hold Request	01-01-2021	12-31-2021
Hold Process: Billing	01-01-2021	12-31-2021
Hold Process: Auto Pay	01-01-2021	06-30-2021
Account 1	01-01-2021	12-31-2021
Account 2	01-20-2021	03-31-2021
Account 3	04-04-2021	10-30-2021

Now, if you want to mass update the hold entity end date to 09-30-2021 on 04-01-2021, the system updates the hold entity, hold process, and hold request end dates as shown in the following table:

	Original Start Date	Original End Date
Hold Request	01-01-2021	09-30-2021
Hold Process: Billing	01-01-2021	09-30-2021
Hold Process: Auto Pay	01-01-2021	06-30-2021

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	Original Start Date	**Original End Date**
Account 1	01-01-2021	09-30-2021
Account 2	01-20-2021	03-31-2021
Account 3	04-04-2021	09-30-2021

While updating the end date of a hold entity, the system checks whether the existing hold entity end date is earlier than the new hold entity end date. If the existing hold entity end date is earlier than the new hold entity end date, the system does not consider and update the end date of such hold entities. However, if the existing hold entity end date is later than the new hold entity end date, the system considers and updates the end date of such hold entities. Similarly, the system checks whether the existing hold process end date is earlier than the new hold entity end date. If the existing hold process end date is earlier than the new hold entity end date, the system does not consider and update the end date of such hold processes. However, if the existing hold process end date is later than the new hold entity end date, the system considers and updates the end date of such hold processes. Finally, the hold request end date is also set to the new hold entity end date.

A log is also created for the hold request indicating that mass update is done for the end date of the entities.

Note:

If the start date of any hold entity is later than the new hold entity end date, the system throws an appropriate error message and does not update the end date of the respective hold entity.

After updating the end date of a hold entity, you need to execute the **Hold Request Monitor** (**C1-HLMON**) batch. On executing the batch, the system will accordingly update the bill after date, postpone credit review until date, defer auto pay date, and hold refund until date, if required, for the respective entity.

Related Topics

For more information on...	**See...**
How to search for a hold request	Searching for a Hold Request on page 1924
Hold Request screen	Hold Request (Used for Viewing) on page 1947
Hold Entities zone	Hold Entities on page 1951

Deleting an Entity from a Hold Request

Procedure

To delete an entity from a hold request:

1. Search for the hold request in the **Hold Request** screen.
2. In the **Search Results** section, click the link in the **Hold Request Information** column corresponding to the *h*old request whose details you want to edit.
   The **Hold Request** screen appears.
3. Select the check box corresponding to the hold entity that you want to delete in the **Hold Entities** zone.

Note: You can also select multiple hold entities at the same time. In addition, you can select the check box corresponding to the column header. This allows you to delete all the hold entities listed in the respective page.

4. Click **Delete**.
   A message appears confirming whether you want to delete the hold entity.

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> **Note:** The **Delete** button appears when the hold request is in the **Draft** or **Active** status. However, the system enables you to delete an entity from the hold request only when it is in the **Draft** status. Also, the entity (i.e., bill or account) added from the **Account Receivable Central**, **Funding Request**, or **Delinquency Central** screen, respectively, cannot be deleted from the hold request even when it is in the **Draft** status.

5. Click **OK**.
   The hold entities are deleted from the hold request.

> **Note:** You cannot remove an entity from a hold request when it is created through the **Upload Request** feature.

Related Topics

For more information on...	See...
How to search for a hold request	Searching for a Hold Request on page 1924
Hold Request screen	Hold Request (Used for Viewing) on page 1947
Hold Request zone	Hold Request on page 1948

Deleting a Hold Request

Procedure

To delete a hold request:

1. Search for the hold request in the **Hold Request** screen.
2. In the **Search Results** section, click the link in the **Hold Request Information** column corresponding to the *h*old request that you want to delete.
   The **Hold Request** screen appears.
3. Ensure that the **Main** tab is selected.
4. Click the **Delete** button in the **Hold Request** zone.
   A message appears confirming whether you want to delete the hold request.

> **Note:** The **Delete** button appears when the hold request is in the **Draft** status.

5. Click **OK**.
   The hold request is deleted.

Related Topics

For more information on...	See...
How to search for a hold request	Searching for a Hold Request on page 1924
Hold Request screen	Hold Request (Used for Viewing) on page 1947
Hold Request zone	Hold Request on page 1948

Discarding a Hold Request

Prerequisites

To discard a hold request, you should have:

- Reasons defined for the **Discarded** status of the **C1-HoldRequest** business object in the **Status Reason** screen

Procedure

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To discard a hold request:

1. Search for a future dated active hold request in the **Hold Request** screen.
2. In the **Search Results** section, click the link in the **Hold Request Information** column corresponding to the *h*old request that you want to discard.
   The **Hold Request** screen appears.
3. Click the **Discard** button in the **Hold Request** zone.

   The **Discard Reason** window appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Discard Reason	Used to indicate the reason why you want to discard the hold request. **Note:** The list includes only those reasons which are defined for the **Discarded** status of the **C1-HoldRequest** business object through the **Status Reason** screen.	Yes
Comments	Used to specify additional information while discarding the hold request.	No

Note:

The **Discard** button appears when the following conditions are met:

- The hold request is future dated (i.e. when the hold request start date is later than the system date).
- The hold request is in the **Active** status.

4. Select the reason for discarding the hold request from the **Discard Reason** list.
5. Enter the comments (if any) while discarding the hold request in the respective field.
6. Click **Save**.
   The status of the hold request is changed to **Discarded**. Note that the hold request end date, hold entity end date, and the hold process end date are not changed to the date when the hold request is discarded.

Related Topics

For more information on...	See...
How to search for a hold request	Searching for a Hold Request on page 1924
Hold Request screen	Hold Request (Used for Viewing) on page 1947
Hold Request zone	Hold Request on page 1948

Submitting a Hold Activation Request

Prerequisites

To submit a hold activation request, you should have:

- At least one entity (such as, person, account, or bill depending on the specified entity level) added to the hold request

Procedure

To submit a hold activation request:

1. Search for the hold request in the **Hold Request** screen.

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2. In the **Search Results** section, click the link in the **Hold Request Information** column corresponding to the *h*old request that you want to submit.
   The **Hold Request** screen appears.
3. Ensure that the **Main** tab is selected.
4. Click the **Submit** button in the **Hold Request** zone.

   The system behaves in the following manner:

If...	**Then...**
The **Activation Approval** option is selected in the respective hold request type	The status of the hold request is changed to **Activation Approval In Progress**. A To Do is created using the To Do type (i.e., **C1-HLDAP**) specified in the **Activation Approval To Do Type** field of the respective hold request type and then assigned to the users with the role specified in the **Activation Approval To Do Role** field of the respective hold request type. In addition, a log entry is created for the hold request when the To Do is created for the approver.
The **Activation Approval** option is not selected in the respective hold request type and the number of entities added (either manually or via filter criteria) in the hold request exceeds the defer processing count (defined in the respective hold request type)	The status of the hold request is changed to **Deferred Processing**. **Note:** You need to execute the **Hold Request Periodic Monitor** (**C1-HLDRQ**) batch. It considers the hold requests which are in the **Deferred Processing** status and then changes its status to **Active**. Once the hold request is activated, you need to execute the following batches: • **C1-DELBI** - If the bill generation process is kept on hold for an account or person through a hold request, you need to execute the **C1-DELBI** batch which will delete the pending bills of the respective entities along with their bill segments. For more information about the batch, see *Oracle Revenue Management and Billing Batch Guide*. • **C1-HLMON** - On executing the **C1-HLMON** batch, the system will set the bill after date, postpone credit review until date, defer auto pay date, and hold refund until date, if required, for the respective entity.
The **Activation Approval** option is not selected in the respective hold request type and the number of entities added (either manually or via filter criteria) in the hold request does not exceed the defer processing count (defined in the respective hold request type)	The status of the hold request is changed to **Active**. In addition, the system does the following (in the online mode): • If the start date of the hold request, hold entity, or hold process is earlier than the system date, it sets the respective start date to the system date. • If an active overdue process (if any) exists for the account which is kept on hold, it cancels the respective overdue process of the account. The status of the overdue process is changed to **Inactive**. • An alert is created in the dashboard whenever an account is kept on hold through a hold request. Note that the start and end dates of the alert is set to the hold request start and end dates, respectively. The alert appears until the hold request for the account is released.

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If...	Then...
	Note: A warning message appears while activating the hold request if the start date of hold request, hold process, or hold entity is earlier than the system date. The system does not allow you to activate a hold request when the hold request end date is earlier than the system date. If the bill generation process is kept on hold for an account or person through a hold request, you need to execute the **C1-DELBI** batch which will delete the pending bills of the respective entities along with their bill segments. For more information about the batch, see *Oracle Revenue Management and Billing Batch Guide*.

Note:

If the **Delinquency** process is added in the hold request, this algorithm derives the entity level of the hold request. If the entity level is set to **Account**, it checks whether any individual or group membership is billed to the account. If an individual membership is billed to the account, it determines whether the number of entities in the hold request exceeds the defer processing count and accordingly changes the status of the hold request to either **Deferred Processing** or **Active**. However, if a group membership is billed to the account, this algorithm does not use the defer processing count. It directly changes the status of the hold request to **Deferred Processing**. Similarly, if the entity level is set to **Person**, it does not use the defer processing count. It directly changes the status of the hold request to **Deferred Processing**.

The **Submit** button appears when the hold request is in the **Draft** status.

On activating a hold request, the system checks whether the number of entities added (either manually or via filter criteria) in the hold request exceeds the defer processing count. If the number of entities added in the hold request does not exceed the defer processing count, the system does the following (in the online mode):

If…	Then...
The hold request is created for an account, the bill generation process is on hold, and the entity start date in the hold request is earlier than or equal to the system date	The entity end date or process end date whichever is earlier is set as the bill after date for the respective account. In addition, the system creates an entry for the hold request in the **CI_BILL_DEL_REQUEST** table.
	Note: The bill after date then appears corresponding to the account in the **Hold Entities** zone of the **Hold Request** screen. In addition, it appears in the **Bill On** or **After Date** field on the **Main** tab of the **Account** screen.
The hold request is created for an account, the overdue process is on hold, and the entity start date in the hold request is earlier than or equal to the system date	The entity end date or process end date whichever is earlier is set as the postpone credit review until date for the respective account.
	Note: The postpone credit review until date then appears corresponding to the account in the **Hold Entities** zone of the **Hold Request** screen. In addition, it appears in the **Postpone Credit Review Until** field on the **C & C** tab of the **Account** screen.
The hold request is created for an account, the delinquency process is on hold, and the entity start date in	The entity end date or process end date whichever is earlier is set as the postpone credit review until date for the respective account.

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If…	Then...
the hold request is earlier than or equal to the system date	**Note:** The postpone credit review until date then appears corresponding to the account in the **Hold Entities** zone of the **Hold Request** screen. In addition, it appears in the **Postpone Credit Review Until** field on the **C & C** tab of the **Account** screen.
The hold request is created for an account, the auto pay process is on hold, and the entity start date in the hold request is earlier than or equal to the system date	The entity end date or process end date whichever is earlier is set as the defer auto pay date for the respective account.
	Note: The defer auto pay date then appears corresponding to the account in the **Hold Entities** zone of the **Hold Request** screen. In addition, it appears in the **Defer Auto Pay Date** field on the **Auto Pay** tab of the **Account** screen.
The hold request is created for an account, the refund process is on hold, and the entity start date in the hold request is earlier than or equal to the system date	The entity end date or process end date whichever is earlier is set as the hold refund until date for the respective account. In addition, the status of the non-final refund request (if any) for the respective account is set to **Hold**.
	Note: The hold refund until date then appears corresponding to the account in the **Hold Entities** zone of the **Hold Request** screen.
The hold request is created for an account, the auto pay process is on hold, and the entity end date in the hold request is earlier than the system date	The automatic payment details of the debit bills (if any) for the respective account are updated in the **CI_BILL_ACH** table.
The hold request is created for a person, the bill generation process is on hold, and the entity start date in the hold request is earlier than or equal to the batch business date	The entity end date or process end date whichever is earlier is set as the bill after date either for all the accounts in the person's hierarchy or only for the persons' immediate accounts depending on whether the **Hierarchy** option is selected or not. Note that the system considers only the child persons and not the grandchild persons from the person's hierarchy and then derives the accounts where the child person is the main customer. In addition, the system creates an entry for the hold request in the **CI_BILL_DEL_REQUEST** table.
	Note: In this scenario, the bill after date is always set in the deferred mode when the **C1-HLMON** batch is executed. The bill after date then appears in the **Bill On** or **After Date** field on the **Main** tab of the **Account** screen.
The hold request is created for a person, the delinquency process is on hold, and the entity start date in the hold request is earlier than or equal to the batch business date	The entity end date or process end date whichever is earlier is set as the postpone credit review until date for the respective person and its immediate accounts (where the person is the main customer). If the **Hierarchy** option is selected for the person, the system sets the postpone credit review until date for the person, its immediate accounts, its child persons, and for the child persons' accounts. Note that the system considers only the child persons and not the grandchild persons from the person's hierarchy and then derives the accounts where the child person is the main customer.

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If…	Then...
	Note: In this scenario, the postpone credit review until date is always set in the deferred mode when the **C1-HLMON** batch is executed. The postpone credit review until date then appears corresponding to the person in the **Hold Entities** zone of the **Hold Request** screen. In addition, the postpone credit review until date of the account appears in the **Postpone Credit Review Until** field on the **C & C** tab of the **Account** screen.

Note:

If the hold entity end date is not specified, the system will consider the respective process end date while deriving the above dates. If both the hold entity end date and respective process end date are not specified, the system will consider the hold request end date while deriving the above dates.

The system does not change the start date of the hold request, hold entity, or hold process when it is a future date.

However, if the number of entities added in the hold request exceeds the defer processing count, the system behavior mentioned in the above table would be completed when the **C1-HLMON** batch is executed.

Related Topics

For more information on...	See...
How to search for a hold request	Searching for a Hold Request on page 1924
Hold Request screen	Hold Request (Used for Viewing) on page 1947
Hold Request zone	Hold Request on page 1948

Approving a Hold Activation Request

You can view the number of hold requests for which activation is pending for approval from the **Hold Request** screen. The approver can review, and accordingly approve or reject the hold activation request based on the observations. In addition, the approver can request the submitter to resubmit the hold activation request for approval after making the necessary changes in it.

Note: The system will not allow you to approve, reject, or request to resubmit a hold activation request submitted by you.

To approve a hold activation request, you should have:

- Required activation approval To Do role assigned in the system

Procedure

To approve a hold activation request:

1. Do either of the following:

If you want to...	Then...
Review a hold activation request through the Hold Request screen	**a.** Search for the hold request with the **Approval In Progress** status in the **Hold Request** screen. A list of hold requests with the respective status appears in the search results.

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If you want to...	Then...
	b. In the **Search Results** section, click the link in the **Hold Request Information** column corresponding to the hold request which you want to review.
Review a hold activation request through the To Do List screen	**a.** Click the **Menu** link in the **Application** toolbar. A list appears. **b.** From the **Main** menu, select **To Do** and then click **To Do List**. The **To Do List** screen appears. **c.** Click the **Search** (🔍) icon corresponding to the **To Do Type** field. The **To Do Type for User Search** window appears. **d.** Enter **C1-HLDAP** in the **To Do Type** field. **e.** Click the **Search** button corresponding to the **To Do Type** field. The **To Do List** screen appears. **f.** Select the **Open** option from the **Filter by** list to view all unassigned To Dos. **g.** Click the link in the **Message** column corresponding to the To Do of the hold request that you want to review.

The **Hold Request** screen appears.

2. Review the details in the **Hold Request** screen.
3. If the information in the hold request is accurate, click the **Approve** button in the **Hold Request** zone.

   The system behaves in the following manner:

If...	Then...
The number of entities added (either manually or via filter criteria) in the hold request exceeds the defer processing count (defined in the respective hold request type)	The status of the hold request is changed to **Deferred Processing**.
	Note: You need to execute the **Hold Request Periodic Monitor** (**C1-HLDRQ**) batch. It considers the hold requests which are in the **Deferred Processing** status and then changes its status to **Active**. Once the hold request is activated, you need to execute the following batches: • **C1-DELBI** - If the bill generation process is kept on hold for an account or person through a hold request, you need to execute the **C1-DELBI** batch which will delete the pending bills of the respective entities along with their bill segments. For more information about the batch, see *Oracle Revenue Management and Billing Batch Guide*. • **C1-HLMON** - On executing the **C1-HLMON** batch, the system will set the bill after date, postpone credit review until date, defer auto pay date, and hold refund until date, if required, for the respective entity.
The number of entities added (either manually or via filter criteria) in the hold request does not exceed the defer processing count (defined in the respective hold request type)	The status of the hold request is changed to **Active**. In addition, the system does the following (in the online mode): • If the start date of the hold request, hold entity, or hold process is earlier than the system date, it sets the respective start date to the system date. • If an active overdue process (if any) exists for the account which is kept on hold, it cancels the respective overdue process of the account. The status of the overdue process is changed to **Inactive**.

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If...	Then...
	• An alert is created in the dashboard whenever an account is kept on hold through a hold request. Note that the start and end dates of the alert is set to the hold request start and end dates, respectively. The alert appears until the hold request for the account is released.
	Note: A warning message appears while activating the hold request if the start date of hold request, hold process, or hold entity is earlier than the system date. The system does not allow you to activate a hold request when the hold request end date is earlier than the system date. If the bill generation process is kept on hold for an account or person through a hold request, you need to execute the **C1-DELBI** batch which will delete the pending bills of the respective entities along with their bill segments. For more information about the batch, see *Oracle Revenue Management and Billing Batch Guide*.

Note:

If the **Delinquency** process is added in the hold request, this algorithm derives the entity level of the hold request. If the entity level is set to **Account**, it checks whether any individual or group membership is billed to the account. If an individual membership is billed to the account, it determines whether the number of entities in the hold request exceeds the defer processing count and accordingly changes the status of the hold request to either **Deferred Processing** or **Active**. However, if a group membership is billed to the account, this algorithm does not use the defer processing count. It directly changes the status of the hold request to **Deferred Processing**. Similarly, if the entity level is set to **Person**, it does not use the defer processing count. It directly changes the status of the hold request to **Deferred Processing**.

The **Approve** button appears when the hold request is in the **Activation Approval In Progress** status and when a user with the activation approval To Do role is reviewing the hold request.

On approving a hold activation request, the system does the following in the online or deferred (i.e., when the **C1-HLMON** batch is executed) mode depending on the defer processing count:

If…	Then...
The hold request is created for an account, the bill generation process is on hold, and the entity start date in the hold request is earlier than or equal to the batch business date	The entity end date or process end date whichever is earlier is set as the bill after date for the respective account. In addition, the system creates an entry for the hold request in the **CI_BILL_DEL_REQUEST** table.
	Note: The bill after date then appears corresponding to the account in the **Hold Entities** zone of the **Hold Request** screen. In addition, it appears in the **Bill On** or **After Date** field on the **Main** tab of the **Account** screen.
The hold request is created for an account, the overdue process is on hold, and the entity start date in the hold request is earlier than or equal to the batch business date	The entity end date or process end date whichever is earlier is set as the postpone credit review until date for the respective account.
	Note: The postpone credit review until date then appears corresponding to the account in the **Hold Entities** zone of the **Hold Request** screen. In addition, it appears in the **Postpone Credit Review Until** field on the **C & C** tab of the **Account** screen.
The hold request is created for an account, the delinquency process is	The entity end date or process end date whichever is earlier is set as the postpone credit review until date for the respective account.

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If…	Then...
on hold, and the entity start date in the hold request is earlier than or equal to the batch business date	**Note:** The postpone credit review until date then appears corresponding to the account in the **Hold Entities** zone of the **Hold Request** screen. In addition, it appears in the **Postpone Credit Review Until** field on the **C & C** tab of the **Account** screen.
The hold request is created for an account, the auto pay process is on hold, and the entity start date in the hold request is earlier than or equal to the batch business date	The entity end date or process end date whichever is earlier is set as the defer auto pay date for the respective account.
	Note: The defer auto pay date then appears corresponding to the account in the **Hold Entities** zone of the **Hold Request** screen. In addition, it appears in the **Defer Auto Pay Date** field on the **Auto Pay** tab of the **Account** screen.
The hold request is created for an account, the refund process is on hold, and the entity start date in the hold request is earlier than or equal to the batch business date	The entity end date or process end date whichever is earlier is set as the hold refund until date for the respective account. In addition, the status of the non-final refund request (if any) for the respective account is set to **Hold**.
	Note: The hold refund until date then appears corresponding to the account in the **Hold Entities** zone of the **Hold Request** screen.
The hold request is created for an account, the auto pay process is on hold, and the entity end date in the hold request is earlier than the batch business date	The automatic payment details of the debit bills (if any) for the respective account are updated in the **CI_BILL_ACH** table.
The hold request is created for a person, the bill generation process is on hold, and the entity start date in the hold request is earlier than or equal to the batch business date	The entity end date or process end date whichever is earlier is set as the bill after date either for all the accounts in the person's hierarchy or only for the persons' immediate accounts depending on whether the **Hierarchy** option is selected or not. Note that the system considers only the child persons and not the grandchild persons from the person's hierarchy and then derives the accounts where the child person is the main customer. In addition, the system creates an entry for the hold request in the **CI_BILL_DEL_REQUEST** table.
	Note: In this scenario, the bill after date is always set in the deferred mode when the **C1-HLMON** batch is executed. The bill after date then appears in the **Bill On** or **After Date** field on the **Main** tab of the **Account** screen.
The hold request is created for a person, the delinquency process is on hold, and the entity start date in the hold request is earlier than or equal to the batch business date	The entity end date or process end date whichever is earlier is set as the postpone credit review until date for the respective person and its immediate accounts (where the person is the main customer). If the **Hierarchy** option is selected for the person, the system sets the postpone credit review until date for the person, its immediate accounts, its child persons, and for the child persons' accounts. Note that the system considers only the child persons and not the grandchild persons from the person's hierarchy and then derives the accounts where the child person is the main customer.

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If…	Then...
	Note: In this scenario, the postpone credit review until date is always set in the deferred mode when the **C1-HLMON** batch is executed. The postpone credit review until date then appears corresponding to the person in the **Hold Entities** zone of the **Hold Request** screen. In addition, the postpone credit review until date of the account appears in the **Postpone Credit Review Until** field on the **C & C** tab of the **Account** screen.

Note:

If the hold entity end date is not specified, the system will consider the respective process end date while deriving the above dates. If both the hold entity end date and respective process end date are not specified, the system will consider the hold request end date while deriving the above dates.

The system does not change the start date of the hold request, hold entity, or hold process when it is a future date.

Related Topics

For more information on...	See...
How to search for a hold request	Searching for a Hold Request on page 1924
Hold Request screen	Hold Request (Used for Viewing) on page 1947
Hold Request zone	Hold Request on page 1948

Rejecting a Hold Activation Request

Prerequisites

To reject a hold activation request, you should have:

- Required activation approval To Do role assigned in the system
- Reasons defined for the **Rejected** status of the **C1-HoldRequest** business object in the **Status Reason** screen.

Note: The system will not allow you to approve, reject, or request to resubmit a hold activation request submitted by you.

Procedure

To reject a hold activation request:

1. Do either of the following:

If you want to...	Then...
Review a hold activation request through the Hold Request screen	**a.** Search for the hold request with the **Activation Approval In Progress** status in the **Hold Request** screen. A list of hold requests with the respective status appears in the search results. **b.** In the **Search Results** section, click the link in the **Hold Request Information** column corresponding to the hold request which you want to review.

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If you want to...	Then...
Review a hold activation request through the To Do List screen	**a.** Click the **Menu** link in the **Application** toolbar. A list appears. **b.** From the **Main** menu, select **To Do** and then click **To Do List**. The **To Do List** screen appears. **c.** Click the **Search** (🔍) icon corresponding to the **To Do Type** field. The **To Do Type for User Search** window appears. **d.** Enter **C1-HLDAP** in the **To Do Type** field. **e.** Click the **Search** button corresponding to the **To Do Type** field. The **To Do List** screen appears. **f.** Select the **Open** option from the **Filter by** list to view all unassigned To Dos. **g.** Click the link in the **Message** column corresponding to the To Do of the hold request that you want to review.

The **Hold Request** screen appears.

2. Review the details in the **Hold Request** screen.
3. If the information in the hold request is incorrect, click the **Reject** button in the **Hold Request** zone.

   The **Reject Hold Request** window appears. It contains following fields:

Field Name	Field Description	Mandatory (Yes or No)
Status Reason	Used to indicate the reason why you want to reject the hold activation request. **Note:** The list includes only those reasons which are defined for the **Rejected** status of the **C1-HoldRequest** business object through the **Status Reason** screen.	Yes
Comments	Used to specify additional information while rejecting the hold activation request. **Note:** You can resize the text box depending on your requirement by clicking the **Resize Handle** (⤡) icon at the bottom right corner of the text box.	No

Note: The **Reject** button appears when the following conditions are met:

- The hold request is in the **Activation Approval In Progress** status.
- A user with the activation approval To Do role is reviewing the hold request.

4. Select the reason for rejecting the hold activation request from the **Status Reason** list.
5. Enter the comments (if any) while rejecting the hold activation request in the respective field.
6. Click **Save**.
   The status of the hold request is changed to **Rejected**.

Related Topics

For more information on...	See...
How to search for a hold request	Searching for a Hold Request on page 1924

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For more information on...	See...
Hold Request screen	Hold Request (Used for Viewing) on page 1947
Hold Request zone	Hold Request on page 1948

Requesting to Resubmit a Hold Activation Request for Approval

While reviewing a hold activation request, the approver can also request the submitter to resubmit the hold activation request for approval after making the necessary changes to it.

Prerequisites

To request to resubmit a hold activation request for approval, you should have:

- Required activation approval To Do role assigned in the system
- Submitter To Do type and submitter To Do role defined in the respective hold request type

Procedure

To request to resubmit a hold activation request for approval:

1. Do either of the following:

If you want to...	Then...
Review a hold activation request through the Hold Request screen	**a.** Search for the hold request with the **Activation Approval In Progress** status in the **Hold Request** screen. A list of hold requests with the respective status appears in the search results. **b.** In the **Search Results** section, click the link in the **Hold Request Information** column corresponding to the hold request which you want to review.
Review a hold activation request through the To Do List screen	**a.** Click the **Menu** link in the **Application** toolbar. A list appears. **b.** From the **Main** menu, select **To Do** and then click **To Do List**. The **To Do List** screen appears. **c.** Click the **Search** (🔍) icon corresponding to the **To Do Type** field. The **To Do Type for User Search** window appears. **d.** Enter **C1-HLDAP** in the **To Do Type** field. **e.** Click the **Search** button corresponding to the **To Do Type** field. The **To Do List** screen appears. **f.** Select the **Open** option from the **Filter by** list to view all unassigned To Dos. **g.** Click the link in the **Message** column corresponding to the To Do of the hold request that you want to review.

   The **Hold Request** screen appears.
2. Review the details in the **Hold Request** screen.
3. If the information in the hold request is incomplete and you want the submitter to make the required changes and resubmit the hold activation request for approval, click the **Re Submit** button in the **Hold Request** zone.

   The **Resubmit Hold Request** window appears. It contains following field:

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Field Name	Field Description	Mandatory (Yes or No)
Comments	Used to specify the changes that the submitter should make in the hold request before resubmitting the activation request for approval. **Note:** You can resize the text box depending on your requirement by clicking the **Resize Handle** (⁄) icon at the bottom right corner of the text box.	Yes

Note: The **Re Submit** button appears when the following conditions are met:

- The hold request is in the **Activation Approval In Progress** status.
- A user with the activation approval To Do role is reviewing the hold request.

4. Enter the comments in the respective field.
5. Click **Save**.
   The status of the hold request is changed to **Draft**. A To Do is created using the To Do type (i.e., **C1-HOLSB**) specified in the **Submitter To Do Type** field of the respective hold request type and then assigned to the users with the role specified in the **Submitter To Do Role** field of the respective hold request type. In addition, a log entry is created for the hold request when the To Do is created for the submitter.

Note:

The To Do is created for the submitter only when the submitter To Do type and submitter To Do role are specified in the respective hold request type.

The **Re Submit** button is not available to the approver when the hold request is created through the **Upload Request** feature or through an inbound web service.

Related Topics

For more information on...	See...
How to search for a hold request	Searching for a Hold Request on page 1924
Hold Request screen	Hold Request (Used for Viewing) on page 1947
Hold Request zone	Hold Request on page 1948

Releasing a Hold Request

Prerequisites

To release a hold request, you should have:

- Reasons defined for the **Released** status of the **C1-HoldRequest** business object in the **Status Reason** screen

Procedure

To release a hold request:

1. Search for the hold request in the **Hold Request** screen.
2. In the **Search Results** section, click the link in the **Hold Request Information** column corresponding to the *h*old request that you want to release.
   The **Hold Request** screen appears.
3. Ensure that the **Main** tab is selected.

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4. Click the **Release** button in the **Hold Request** zone.

   The **Release Reason** window appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Release Reason	Used to indicate the reason why you want to release the hold request.	Yes
	Note: The list includes only those reasons which are defined for the **Released** status of the **C1-HoldRequest** business object through the **Status Reason** screen.	
Comments	Used to specify additional information while releasing the hold request.	No
	Note: You can resize the text box depending on your requirement by clicking the **Resize Handle** (⇲) icon at the bottom right corner of the text box.	

Note: The **Release** button appears when the hold request is in the **Active** status.

5. Select the reason for releasing the hold request from the **Release Reason** list.
6. Enter the comments (if any) while releasing the hold request in the respective field.
7. Click **Save**.

   The system behaves in the following manner:

If...	Then...
The **Release Approval** option is selected in the respective hold request type	The status of the hold request is changed to **Release Approval in Progress**. A To Do is created using the To Do type (i.e., **C1-HLDAP**) specified in the **Release Approval To Do Type** field of the respective hold request type and then assigned to the users with the role specified in the **Release Approval To Do Role** field of the respective hold request type. In addition, a log entry is created for the hold request when the To Do is created for the approver.
The **Release Approval** option is not selected in the respective hold request type	The status of the hold request is changed to **Released**. If the hold entity end date and hold process end date is earlier than the system date, the system sets the hold entity end date and hold process end date to the system date. It also sets the hold request end date to the system date. In addition, the alert end date on the respective account is set to the system date.

On releasing a hold request, the system checks whether the number of entities added (either manually or via filter criteria) in the hold request exceeds the defer processing count. If the number of entities added in the hold request does not exceed the defer processing count, the system does the following (in the online mode):

If…	Then…
The hold request is created for an account, the auto pay process is on hold, and the entity end date in the hold request is earlier than or equal to the system date	The defer auto pay until date is set to the system date for the respective account. In addition, the automatic payment details of the debit bills (if any) for the respective account are updated in the **CI_BILL_ACH** table.
	Note: The defer auto pay date then appears corresponding to the account in the **Hold Entities** zone of the **Hold Request** screen. In addition, it appears in the **Defer Auto Pay Date** field on the **Auto Pay** tab of the **Account** screen.

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If…	Then…
The hold request is created for an account, the bill generation process is on hold, and the entity end date in the hold request is earlier than or equal to the system date	The bill after date is cleared for the respective account. This will enable the business to bill the account immediately on the same day when the hold is released.
	Note: The bill after date is cleared corresponding to the account in the **Hold Entities** zone of the **Hold Request** screen. In addition, it is cleared from the **Bill On** or **After Date** field on the **Main** tab of the **Account** screen.
The hold request is created for an account, the overdue process is on hold, and the entity end date in the hold request is earlier than or equal to the system date	The postpone credit review until date is set to the system date for the respective account.
	Note: The postpone credit review until date then appears corresponding to the account in the **Hold Entities** zone of the **Hold Request** screen. In addition, it appears in the **Postpone Credit Review Until** field on the **C & C** tab of the **Account** screen.
The hold request is created for an account, the delinquency process is on hold, and the entity end date in the hold request is earlier than or equal to the system date	The postpone credit review until date is set to the system date for the respective account.
	Note: The postpone credit review until date then appears corresponding to the account in the **Hold Entities** zone of the **Hold Request** screen. In addition, it appears in the **Postpone Credit Review Until** field on the **C & C** tab of the **Account** screen.
The hold request is created for an account, the refund process is on hold, and the entity end date in the hold request is earlier than or equal to the system date	The hold refund until date is set to the system date for the respective account. In addition, the status of the refund request (if any) for the respective accounts is changed from **Hold** to its previous status.
	Note: The hold refund until date then appears corresponding to the account in the **Hold Entities** zone of the **Hold Request** screen.
The hold request is created for a person, the bill generation process is on hold, and the entity end date in the hold request is earlier than or equal to the batch business date	The bill after date is cleared either for all the accounts in the person's hierarchy or only for the persons' immediate accounts depending on whether the **Hierarchy** option is selected or not. Note that the system considers only the child persons and not the grandchild persons from the person's hierarchy and then derives the accounts where the child person is the main customer.
	Note: In this scenario, the bill after date is always cleared in the deferred mode when the **C1-HLMON** batch is executed. The bill after date is cleared from the **Bill On** or **After Date** field on the **Main** tab of the **Account** screen.
The hold request is created for a person, the delinquency process is on hold, and the entity end date in the hold request is earlier than or equal to the batch business date	The postpone credit review until date is set to the system date for the respective person and its immediate accounts (where the person is the main customer). If the Hierarchy option is selected for the person, the system sets the postpone credit review until date for the person, its immediate accounts, its child persons, and for the child persons' accounts. Note that the system considers only the child persons and not the grandchild persons from the person's hierarchy and then derives the accounts where the child person is the main customer.

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If…	Then…
	Note: In this scenario, the postpone credit review until date is always set in the deferred mode when the **C1-HLMON** batch is executed. The postpone credit review until date then appears corresponding to the person in the **Hold Entities** zone of the **Hold Request** screen. In addition, the postpone credit review until date of the account appears in the **Postpone Credit Review Until** field on the **C & C** tab of the **Account** screen.

Note: The above dates are updated to the system date only when the entity end date or respective process end date is not earlier than the system date.

However, if the number of entities added in the hold request exceeds the defer processing count, a log entry is created indicating that the hold request is manually released but the release process (i.e. system behavior mentioned in the above table) would be completed when the **C1-HLMON** batch is executed.

Related Topics

For more information on...	See...
How to search for a hold request	Searching for a Hold Request on page 1924
Hold Request screen	Hold Request (Used for Viewing) on page 1947
Hold Request zone	Hold Request on page 1948

Approving a Hold Release Request

You can view the number of hold requests for which release is pending for approval from the **Hold Request** screen. The approver can review, and accordingly approve the hold release request based on the observations. In addition, the approver can request the submitter to resubmit the hold release request for approval after making the necessary changes in it.

Note: The system will not allow you to approve or request to resubmit a hold release request submitted by you.

To approve a hold release request, you should have:

- Release approval To Do role assigned in the system

Procedure

To approve a hold release request:

1. Do either of the following:

If you want to...	Then...
Review a hold release request through the Hold Request screen	**a.** Search for the hold request with the **Release Approval in Progress** status in the **Hold Request** screen. A list of hold requests with the respective status appears in the search results. **b.** In the **Search Results** section, click the link in the **Hold Request Information** column corresponding to the hold request which you want to review.

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If you want to...	Then...
Review a hold release request through the To Do List screen	**a.** Click the **Menu** link in the **Application** toolbar. A list appears. **b.** From the **Main** menu, select **To Do** and then click **To Do List**. The **To Do List** screen appears. **c.** Click the **Search** (🔍) icon corresponding to the **To Do Type** field. The **To Do Type for User Search** window appears. **d.** Enter **C1-HLDAP** in the **To Do Type** field. **e.** Click the **Search** button corresponding to the **To Do Type** field. The **To Do List** screen appears. **f.** Select the **Open** option from the **Filter by** list to view all unassigned To Dos. **g.** Click the link in the **Message** column corresponding to the To Do of the hold request that you want to review.

The **Hold Request** screen appears.

2. Review the details in the **Hold Request** screen.
3. If the information in the hold request is accurate, click the **Approve** button in the **Hold Request** zone.

The status of the hold request is changed to **Released**. If the hold entity end date and hold process end date is earlier than the system date, the system sets the hold entity end date and hold process end date to the system date. It also sets the hold request end date to the system date. In addition, the alert end date on the respective account is set to the system date.

Note: The **Approve** button appears when the hold request is in the **Release Approval in Progress** status and when a user with the release approval To Do role is reviewing the hold request.

On releasing a hold request, the system checks whether the number of entities added (either manually or via filter criteria) in the hold request exceeds the defer processing count. If the number of entities added in the hold request does not exceed the defer processing count, the system does the following (in the online mode):

If…	Then…
The hold request is created for an account, the auto pay process is on hold, and the entity end date in the hold request is earlier than or equal to the system date	The defer auto pay until date is set to the system date for the respective account. In addition, the automatic payment details of the debit bills (if any) for the respective account are updated in the **CI_BILL_ACH** table.
	Note: The defer auto pay date then appears corresponding to the account in the **Hold Entities** zone of the **Hold Request** screen. In addition, it appears in the **Defer Auto Pay Date** field on the **Auto Pay** tab of the **Account** screen.
The hold request is created for an account, the bill generation process is on hold, and the entity end date in the hold request is earlier than or equal to the system date	The bill after date is cleared for the respective account. This will enable the business to bill the account immediately on the same day when the hold is released.
	Note: The bill after date is cleared corresponding to the account in the **Hold Entities** zone of the **Hold Request** screen. In addition, it is cleared from the **Bill On** or **After Date** field on the **Main** tab of the **Account** screen.
The hold request is created for an account, the overdue process is on hold, and the entity end date in the	The postpone credit review until date is set to the system date for the respective account.

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If…	Then…
hold request is earlier than or equal to the system date	**Note:** The postpone credit review until date then appears corresponding to the account in the **Hold Entities** zone of the **Hold Request** screen. In addition, it appears in the **Postpone Credit Review Until** field on the **C & C** tab of the **Account** screen.
The hold request is created for an account, the delinquency process is on hold, and the entity end date in the hold request is earlier than or equal to the system date	The postpone credit review until date is set to the system date for the respective account.
	Note: The postpone credit review until date then appears corresponding to the account in the **Hold Entities** zone of the **Hold Request** screen. In addition, it appears in the **Postpone Credit Review Until** field on the **C & C** tab of the **Account** screen.
The hold request is created for an account, the refund process is on hold, and the entity end date in the hold request is earlier than or equal to the system date	The hold refund until date is set to the system date for the respective account. In addition, the status of the refund request (if any) for the respective accounts is changed from **Hold** to its previous status.
	Note: The hold refund until date then appears corresponding to the account in the **Hold Entities** zone of the **Hold Request** screen.
The hold request is created for a person, the bill generation process is on hold, and the entity end date in the hold request is earlier than or equal to the batch business date	The bill after date is cleared either for all the accounts in the person's hierarchy or only for the persons' immediate accounts depending on whether the **Hierarchy** option is selected or not. Note that the system considers only the child persons and not the grandchild persons from the person's hierarchy and then derives the accounts where the child person is the main customer.
	Note: In this scenario, the bill after date is always cleared in the deferred mode when the **C1-HLMON** batch is executed. The bill after date is cleared from the **Bill On** or **After Date** field on the **Main** tab of the **Account** screen.
The hold request is created for a person, the delinquency process is on hold, and the entity end date in the hold request is earlier than or equal to the batch business date	The postpone credit review until date is set to the system date for the respective person and its immediate accounts (where the person is the main customer). If the Hierarchy option is selected for the person, the system sets the postpone credit review until date for the person, its immediate accounts, its child persons, and for the child persons' accounts. Note that the system considers only the child persons and not the grandchild persons from the person's hierarchy and then derives the accounts where the child person is the main customer.
	Note: In this scenario, the postpone credit review until date is always set in the deferred mode when the **C1-HLMON** batch is executed. The postpone credit review until date then appears corresponding to the person in the **Hold Entities** zone of the **Hold Request** screen. In addition, the postpone credit review until date of the account appears in the **Postpone Credit Review Until** field on the **C & C** tab of the **Account** screen.

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Note: The above dates are updated to the system date only when the entity end date or respective process end date is not earlier than the system date.

However, if the number of entities added in the hold request exceeds the defer processing count, a log entry is created indicating that the hold request is manually released but the release process (i.e. system behavior mentioned in the above table) would be completed when the **C1-HLMON** batch is executed.

Related Topics

For more information on...	See...
How to search for a hold request	Searching for a Hold Request on page 1924
Hold Request screen	Hold Request (Used for Viewing) on page 1947
Hold Request zone	Hold Request on page 1948

Requesting to Resubmit a Hold Release Request for Approval

While reviewing a hold release request, the approver can also request the submitter to resubmit the hold release request for approval after making the necessary changes to it.

Prerequisites

To request to resubmit a hold release request for approval, you should have:

- Release approval To Do role assigned in the system
- Submitter To Do type and submitter To Do role defined in the respective hold request type

Procedure

To request to resubmit a hold release request for approval:

1. Do either of the following:

If you want to...	Then...
Review a hold release request through the Hold Request screen	**a.** Search for the hold request with the **Release Approval In Progress** status in the **Hold Request** screen. A list of hold requests with the respective status appears in the search results. **b.** In the **Search Results** section, click the link in the **Hold Request Information** column corresponding to the hold request which you want to review.
Review a hold release request through the To Do List screen	**a.** Click the **Menu** link in the **Application** toolbar. A list appears. **b.** From the **Main** menu, select **To Do** and then click **To Do List**. The **To Do List** screen appears. **c.** Click the **Search** (🔍) icon corresponding to the **To Do Type** field. The **To Do Type for User Search** window appears. **d.** Enter **C1-HLDAP** in the **To Do Type** field. **e.** Click the **Search** button corresponding to the **To Do Type** field. The **To Do List** screen appears. **f.** Select the **Open** option from the **Filter by** list to view all unassigned To Dos.

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If you want to...	Then...
	g. Click the link in the **Message** column corresponding to the To Do of the hold request that you want to review.

The **Hold Request** screen appears.

2. Review the details in the **Hold Request** screen.
3. If the information in the hold request is incomplete and you want the submitter to make the required changes and resubmit the hold release request for approval, click the **Re Submit** button in the **Hold Request** zone.

   The **Resubmit Hold Request** window appears. It contains following field:

Field Name	Field Description	Mandatory (Yes or No)
Comments	Used to specify the changes that the submitter should make in the hold request before resubmitting the release request for approval. **Note:** You can resize the text box depending on your requirement by clicking the **Resize Handle** (⁄) icon at the bottom right corner of the text box.	Yes

Note: The **Re Submit** button appears when the following conditions are met:

- The hold request is in the **Release Approval In Progress** status.
- A user with the release To Do role is reviewing the hold request.

4. Enter the comments in the respective field.
5. Click **Save**.
   The status of the hold request is changed to **Active**. A To Do is created using the To Do type (i.e., **C1-HOLSB**) specified in the **Submitter To Do Type** field of the respective hold request type and then assigned to the users with the role specified in the **Submitter To Do Role** field of the respective hold request type. In addition, a log entry is created for the hold request when the To Do is created for the submitter.

Note:

The To Do is created for the submitter only when the submitter To Do type and submitter To Do role are specified in the respective hold request type.

The **Re Submit** button is not available to the approver when the hold request is created through the **Upload Request** feature or through an inbound web service.

Related Topics

For more information on...	See...
How to search for a hold request	Searching for a Hold Request on page 1924
Hold Request screen	Hold Request (Used for Viewing) on page 1947
Hold Request zone	Hold Request on page 1948

Viewing the Log of a Hold Request

Procedure

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To view the log of a hold request:

1. Search for the hold request in the **Hold Request** screen.
2. In the **Search Results** section, click the link in the **Hold Request Information** column corresponding to the *h*old request whose details you want to view.
   The **Hold Request** screen appears.
3. Click the **Log** tab.
   The **Log** tab appears.
4. View the complete trail of actions performed on the hold request in the **Hold Request Log** zone.

Related Topics

For more information on...	See...
How to search for a hold request	Searching for a Hold Request on page 1924
Hold Request screen	Hold Request (Used for Viewing) on page 1947
Hold Request Log zone	Hold Request Log on page 1966
How to add a log entry for a hold request	Adding a Log Entry for a Hold Request on page 1996

Adding a Log Entry for a Hold Request

Procedure

To add a log entry for a hold request:

1. Search for the hold request in the **Hold Request** screen.
2. In the **Search Results** section, click the link in the **Hold Request Information** column corresponding to the *h*old request for which you want to add a log entry.
   The **Hold Request** screen appears.
3. Click the **Log** tab.
   The **Log** tab appears.
4. Click the **Add Log Entry** link in the upper right corner of the **Hold Request Log** zone.

   The **Add Hold Request Log** window appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Hold Request Information	Displays information about the hold request.	Not applicable
Log Details	Used to specify additional comments for the hold request.	Yes
	Note: You can resize the text box depending on your requirement by clicking the **Resize Handle** (⟋) icon at the bottom right corner of the text box.	

5. Enter the comments in the **Log Details** field.
6. Click **Save**.
   The log entry is added in the **Hold Request Log** zone.

Related Topics

For more information on...	See...
How to search for a hold request	Searching for a Hold Request on page 1924

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For more information on...	See...
Hold Request screen	Hold Request (Used for Viewing) on page 1947
Hold Request Log zone	Hold Request Log on page 1966

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Chapter 28

Delinquency Central

Topics:

- Prerequisites
- Delinquency Central (Used for Viewing)
- Overdue Process Information for Account: {Account ID}

Oracle Revenue Management and Billing provides a complete overview of the overdue bills belonging to the delinquent accounts of a particular person using the **Delinquency Central**. User can review the overdue bills and perform following actions from the delinquency central:

- Initiate customer contact
- Initiate hold on overdue process
- Create payment arrangement for an account
- Create promise to pay for person's account

The Delinquency Central assists you in identifying all the overdue processes, overdue bills & delinquent accounts using an overdue monitoring process.

For more information on how to setup the delinquency central, see Prerequisites on page 2000.

Prerequisites

To setup delinquency central, you need to do the following:

- Define the required characteristic types where the characteristic entity is set to overdue event.
- Define the overdue event type and overdue process template in the system.
- Promise To Pay type defined in the application.
- Customer contact type defined in the application.
- Hold request type defined in the application.

Delinquency Central (Used for Viewing)

The **Delinquency Central** screen allows you to:

- Search for an overdue process
- View the details of an overdue process
- View the details of an overdue event
- Create customer contact
- Create a hold request for an overdue process
- Create a payment arrangement for an account
- Create a promise to pay for a person's account
- Create a payment agreement request for an account

This screen consists of the following zones:

- Search Overdue Process on page 2000
- Overdue Events on page 2005

Search Overdue Process

The **Search Overdue Process** zone allows you to search for overdue processes using various search criteria. This zone contains the following two sections:

- **Search Criteria** - The **Search Criteria** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Search By	Used to indicate whether you want to search for overdue processes using person, account, bill or overdue process. The valid values are: • Person • Account • Bill • Overdue Process **Note:** By default, the **Person** option is selected.	No
Person ID	Used to search for overdue processes which belong to a particular person.	No

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Field Name	Field Description	Mandatory (Yes or No)
	Note: This field appears when you select the **Person** option from the **Search By** list.	
Person Identifier Type	Used to search for overdue processes with a particular person identifier type. **Note:** This field appears when you select the **Person** option from the **Search By** list.	Yes (Conditional) **Note:** If you enter the person identifier as a search criteria, you have to select the person identifier type.
Person Identifier	Used to search for overdue processes with a specific value of the person identifier type. **Note:** This field appears when you select the **Person** option from the **Search By** list.	Yes
Account ID	Used to search for overdue processes created for a particular account. **Note:** This field appears when you select the **Account** option from the **Search By** list.	No
Account Identifier Type	Used to search for overdue processes with a particular account identifier type. **Note:** This field appears when you select the **Account** option from the **Search By** list.	Yes (Conditional) **Note:** If you enter the account identifier as a search criteria, you have to select the account identifier type.
Account Identifier	Used to search for overdue processes with a particular account identifier. **Note:** This field appears when you select the **Account** option from the **Search By** list.	Yes
Bill ID	Used to search for overdue processes with a particular bill. **Note:** This field appears when you select the **Bill** option from the **Search By** list.	No
Alternate Bill ID	Used to search for overdue processes using an alternate bill ID. **Note:** This field appears when you select the **Bill** option from the **Search By** list.	No
Characteristic Type / Value	Used to search for overdue processes with a particular characteristic type and its value. **Note:** This field appears when you select the **Bill** option from the **Search By** list.	No

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Field Name	Field Description	Mandatory (Yes or No)
Overdue Process Template	Used to search for overdue processes with a particular overdue process template. **Note:** This field appears when you select the **Overdue Process** option from the **Search By** list.	No
Start Date	Used to search for overdue processes with a particular start date. **Note:** This field appears when you select the **Overdue Process** option from the **Search By** list.	Yes
End Date	Used to search overdue process with a particular end date. **Note:** This field appears when you select the **Overdue Process** option from the **Search By** list.	Yes
Status	Used to search for overdue processes with a particular status. The valid values are: • Active • Inactive **Note:** This field appears when you select the **Overdue Process** option from the **Search By** list.	No
On Hold	Used to search for overdue processes that are on hold. **Note:** This field appears when you select the **Overdue Process** option from the **Search By** list.	No
Overdue Amount From	Used to search for overdue processes with a particular lower limit of the overdue amount. **Note:** This field appears when you select the **Overdue Process** option from the **Search By** list.	No
To	Used to search for overdue processes with a particular higher limit of the overdue amount. **Note:** This field appears when you select the **Overdue Process** option from the **Search By** list.	No
Characteristic Type / Value	Used to search for overdue processes with a particular characteristic type and value. **Note:** This field appears when you select the **Overdue Process** option from the **Search By** list.	No

- In addition to above search parameters, the screen consists of following fields in the **Person Details** or **Account Details** section:

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Column Name	Column Description
Main Customer	Displays the name of the main customer to whom the account belongs. **Note:** This field appears when you select the **Account** option from the **Search By** list.
Person Name	Displays the name of the person to whom the account belongs. **Note:** This field appears when you select the **Person** option from the **Search By** list.
Person Identifier Type	Displays the person identifier type. **Note:** This field appears when you select the **Person** or **Account** option from the **Search By** list.
Person Identifier	Displays the value of the person identifier type. **Note:** This field appears when you select the **Person** or **Account**option from the **Search By** list.
Account Identifier Type	Displays the account identifier type. **Note:** This field appears when you select the **Account** option from the **Search By** list.
Account Identifier	Displays the value of the account identifier type. **Note:** This field appears when you select the **Account** option from the **Search By** list.
Overdue	Displays whether the person account(s)/bill(s) are overdue. The valid values are: • Yes • No **Note:** This field appears when you select the **Person** or **Account** option from the **Search By** list.
Number of Active Overdue processes	Displays the number of overdue processes linked to the person's account that are in active status. **Note:** This field appears when you select the **Person** or **Account** option from the **Search By** list.
Number of Hold(s) on Account(s)	Displays the number of hold requests on the particular account.
Number of Overdue Bills	Displays the total number of bills that are overdue. **Note:** This field appears when you select the **Person** or **Account** option from the **Search By** list.
Total Overdue Amount	Displays the total overdue amount for an account.
Last Payment Date	Displays date of the last payment made by the person.

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Column Name	Column Description
	Note: This field appears when you select the **Person** or **Account** option from the **Search By** list.
Last Payment Amount	Displays the amount last paid by the person.
	Note: This field appears when you select the **Person** or **Account** option from the **Search By** list.
Number Of Payment Arrangements	Displays the number of payment arrangements for the person's account.
	Note: This field appears when you select the **Person** or **Account** option from the **Search By** list.
Total Number of Overdue Process on Hold	Displays the total number of overdue process that are on hold.
	Note: This field appears when you select the **Person** or **Account** option from the **Search By** list.
Number of Promise To Pay	Displays the number of promise to pay belonging to the person.
	Note: This field appears when you select the **Person** or **Account** option from the **Search By** list.
Number of Broken Promise To Pay	Displays the total number of promise to pay that are broken.
	Note: This field appears when you select the **Person** or **Account** option from the **Search By** list.

- **Search Results** - On clicking the **Search** button, the search results appear based on the specified search criteria. The **Search Results** section contains the following columns:

Column Name	Column Description
Overdue Process	Display additional information about the overdue process.
	Note: It has a link. On clicking the link, the **Overdue Process** screen appears where you can view the details of the overdue process.
Overdue Process Template	Displays the template that was used to create overdue process's events.
Account Information	Display additional information about the account. In addition, this column has a context menu which helps in navigating to other screens in the application.
	Note: It has a link. On clicking the link, the **Account** screen appears with the details of the account.
Person Information	Display additional information about the person. In addition, this column has a context menu which helps in navigating to other screens in the application.
	Note: It has a link. On clicking the link, the **Person** screen appears with the details of the person.
Overdue Amount	Displays the overdue amount under that overdue process.

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Column Name	Column Description
On Hold	Displays whether the overdue process is on hold.
Overdue Process Details	On clicking the **View** (🔗) icon, the **Overdue Process Details** screen appears where you can view details of the overdue process.

On clicking the **Broadcast** (📡) icon corresponding to the overdue process, the **Overdue Events** zone appears with the details of the respective overdue process.

Related Topics

For more information on...	See...
Overdue Events screen	Overdue Events on page 2005
How to search for a bill	Searching for a Bill on page 2011
How to view events of an overdue process	Viewing Events of an Overdue Process on page 2006
How to view details of an overdue process	Viewing the Overdue Process Details on page 2006

Overdue Events

The **Overdue Events** zone displays the details of the events of the overdue process on the **Delinquency Central** screen.

Column Name	Column Description
Event	Displays information about the event of the overdue process.
Event Status	Displays the status of the event.
Dependency on Other Events	Displays whether the event is dependent on other events. The valid values are: • No • Yes
Trigger Date	Displays the trigger date of the event.

Related Topics

For more information on...	See...
Delinquency Central screen	Delinquency Central (Used for Viewing) on page 2000
How to view events of an overdue process	Viewing Events of an Overdue Process on page 2006

Searching for an Overdue Process

Prerequisites

To search for an overdue process, you should have:

- Overdue process defined in the application.

Procedure

To search for an overdue process:

1. Click the **Menu** link in the **Application** toolbar

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2. From the **Main** menu, select **Delinquency Management** and then click **Delinquency Central**.
   The **Delinquency Central** screen appears.
3. Enter the search criteria in the **Search Overdue Process** zone.

> **Note:** ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.

4. Click **Search**.
   A list of overdue processes that meet the search criteria appear in the **Search Results** section.

Related Topics

For more information on...	See...
Delinquency Central screen	Delinquency Central (Used for Viewing) on page 2000
Search Overdue Process zone	Search Overdue Process on page 2000

Viewing Events of an Overdue Process

Procedure

To view events of an overdue process:

1. Search for the overdue process in the **Delinquency Central** screen.
2. In the **Search Results** section, click the **Broadcast** (📡) icon corresponding to the overdue process whose *e*vent details you want to view.
   The **Overdue Events** zone appears.
3. View the overdue event details of the overdue process in the **Overdue Events** zone.

Related Topics

For more information on...	See...
Delinquency Central screen	Delinquency Central (Used for Viewing) on page 2000
Overdue Events screen	Overdue Events on page 2005
How to search for an overdue process	Searching for an Overdue Process on page 2005

Viewing the Overdue Process Details

Procedure

To view the details of an overdue process:

1. Search for the overdue process in the **Delinquency Central** screen.
2. In the **Search Results** section, click the link in the **Overdue Process Information** column corresponding to the overdue *p*rocess whose details you want to view.

   The **Overdue Process** screen appears. It consists of the following tabs:

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- **Main** - Displays the basic details of the overdue process.
- **Events** - Displays the events details of the overdue process.
- **Log** - Displays a complete trail of actions performed on the overdue process.
- **Characteristics** - Displays the characteristics of the overdue process.

3. View the event details of the overdue process in the **Overdue Process** screen.

Related Topics

For more information on...	See...
Delinquency Central screen	Delinquency Central (Used for Viewing) on page 2000
How to search for an overdue process	Searching for an Overdue Process on page 2005

Overdue Process Information for Account: {Account ID}

The **Overdue Process Information for Account: {Account ID}** screen allows you to view detail information of the account which is linked to the overdue process.

This screen consists of the following zones:

- Person Information on page 2007
- Account Information on page 2008
- Customer Contact Details on page 2008
- Promise To Pay on page 2008
- Hold Details on page 2009
- Overdue Bills on page 2009
- Payment Arrangement on page 2009
- Search Bill on page 2010
- Searching for a Bill on page 2011
- Adding the Customer Contact Details on page 2011
- Creating a Hold Request for an Overdue Process on page 2012
- Creating a Payment Arrangement for an Overdue Process on page 2013
- Defining a Promise To Pay for an Overdue Process on page 2013

Person Information

The **Person Information** zone displays details of the person whose account is linked to the overdue process. This zone contains following columns:

Column Name	Column Description
Person Name	Displays the name of the person whose account is linked to the overdue process.
Phone Number	Displays the phone number of the person.
Address	Displays the address of the person.

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Account Information

The **Account Information** zone displays the details of the account that is linked with the overdue process. This zone contains following columns:

Column Name	Column Description
Account ID	Displays the account ID.
Account Identifier Type	Displays the account identifier type.
Account Identifier	Displays the value of the account identifier type.
Last Payment Date	Displays the date of the last payment made from the account that is linked with the overdue process.
Last Payment Amount	Displays the amount last paid from the account.

Customer Contact Details

The **Customer Contact Details** zone displays the contact details of the customer whose account is linked with the overdue process. This zone contains following columns:

Column Name	Column Description
Contact Date/Time	Displays the date and time when the customer was contacted.
Customer Contact Information	Displays additional information about the customer contact. **Note:** It has a link. On clicking the link, the **Customer Contact** screen appears where you can view the details of the respective customer contact.
Preferred Contact Method	Displays the preferred method of contacting the customer.
Comments	Displays the comments that are placed against each customer.

Promise To Pay

The **Promise To Pay** zone displays promise to pay created for an account which is linked to the overdue process. This zone contains following columns:

Column Name	Column Description
Promise To Pay Information	Displays additional information of promise to pay. **Note:** It has a link. On clicking the link, the **Promise To Pay** screen appears where you can view the details of promise to pay.
Scheduled Amount	Displays the amount to be paid on the **Scheduled Date**.
Scheduled Date	Displays the date when the payment is expected as per promise to pay.
Status	Displays the status of promise to pay.
Created By	Displays the user ID who has created the promise to pay.

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Hold Details

The **Hold Details** zone displays the details of the person whose account is linked to the overdue process. This zone contains the following columns:

Column Name	Column Description
Hold Request Information	Displays additional information about the hold request.
	Note: It has a link. On clicking the link, the **Hold Request** screen appears where you can view the details of the hold request.
Status	Displays the status of the hold request.
Entity	Displays the hold request entity.
Entity Information	Displays the information about the entity on hold.
	Note: It has a link. On clicking the link, the **Account**, **Bill** or **Person** screen appears, where you can view details of the respective account, bill or person.
Start Date	Displays the date when the hold request is created.
End Date	Displays the end date of the hold request.

Overdue Bills

The **Overdue Bills** zone displays details of the overdue bills. This zone contains following columns:

Column Name	Column Description
Bill Information	Displays additional information about the bill.
	Note: It has a link. On clicking the link, the **Bill** screen appears where you can view the details of the respective bill.
Original Bill Amount	Displays the bill amount when the bill was generated.
Due Date	Displays the due date of the bill.
Overdue Amount	Displays the amount that is overdue in the bill.
Days Past Due	Displays the number of days past after the bill date.

Payment Arrangement

The **Payment Arrangement** zone displays the details of the payment arrangement that is created for an account linked to the overdue process. This zone contains following columns:

Column Name	Column Description
Contract Information	Displays the payment arrangement contract information . In addition, this column has a context menu which helps in navigating to other screens in the application.

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Column Name	Column Description
	Note: It has a link. On clicking the link, the **Contract** screen appears where you can view the details of the respective contract.
Payoff Balance	Displays the total amount that is paid against the payment arrangement contract.
Arrange Amount	Displays the amount that is paid in installments as per the payment arrangement contract.
Number of Installments	Displays the number of installments used to calculate the **Arrange Amount**.

Search Bill

The **Search Bill** zone allows you to search for a bill. This zone contains the following fields:

- **Search Criteria** - The **Search Criteria** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Person Name	Used to specify the name of the person for whom the bill is generated.	No
Person ID	Used to specify the person ID.	No
Bills of Persons in Hierarchy	Used to indicate whether you want to search for a bills generated against a person's hierarchy.	No
Bill Cycle	Used to indicate bills where a particular bill cycle is defined.	No
Bill Currency	Used to indicate the bill currency.	No
Billing Method	Used to indicate the billing method. The valid values are: • Ad-Hoc Billing • Regular Billing	No
Bill ID	Used to specify the bill ID.	No
Alternate Bill ID	Used to search a particular bill using the alternate bill ID.	No
Account ID	Used to indicate the account against which the bill is generated.	No
On or After Bill Date	Used to specify the date when the bill was completed.	No
Account Identifier Type	Used to search for bills where the account against which it is generated, a particular account identifier type is defined.	No
Account Identifier	Used to search for a bill generated against an account with a particular account identifier.	No

Note: You must specify at least one search criterion while searching for the bill.

- **Search Results** - On clicking the **Search** button, the search results appear based on the specified search criteria. The **Search Results** section contains the following columns:

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Column Name	Column Description
Person Name	Displays the name of the person against whom the bill is generated.
Bill ID	Displays the bill ID.
Bill Status	Displays the status of the bill. The valid values are: • Pending • Complete
Bill Date	Displays the date when the bill was completed.
Due Date	Displays the due date of the bill.
Current Charges	Displays the bill amount.
Bill Information	Displays additional information about the bill.

Searching for a Bill

Procedure

To search for a bill:

1. Click the **Menu** link in the **Application** toolbar.
   A list appears.
2. From the **Main** menu, select **Delinquency Management** and then click **Delinquency Central**.
   The **Delinquency Central** screen appears.
3. Select the **Bill** option from the **Search By** list.

   Note: ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.
4. Click **Search**.
   A list of bills that meet the search criteria appear in the **Search Results** section.

Related Topics

For more information on...	See...
Delinquency Central screen	Delinquency Central (Used for Viewing) on page 2000
Search Overdue Process zone	Search Overdue Process on page 2000

Adding the Customer Contact Details

Procedure

To add customer contact details:

1. Search for an overdue process in the **Delinquency Central** screen.
2. In the **Search Results** section , select the check box corresponding to the overdue process linked to the account *f*or which you want to add the customer contact.
3. Click **Contact Customer**.

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The **Customer Contact** screen appears.

4. Enter the required details.
   The fields **Person ID**, **Contact Date/Time** and **User ID** are auto-populated.
5. Click **Save**.
   The customer is contacted based on the value set for **Preferred Contact Method** field on the **Customer Contact** screen.

Related Topics

For more information on...	See...
Delinquency Central screen	Delinquency Central (Used for Viewing) on page 2000

Creating a Hold Request for an Overdue Process

Procedure

To create a hold request for an overdue process:

1. Search for an overdue process in the **Delinquency Central** screen.
2. In the **Search Results** section, select the check box corresponding to the **Overdue Process Information** column for whom you want to create a hold request for an overdue process.
3. Click **Create Hold Request** button.
   The **Add Hold Request** screen appears. It contains the following field:

Field Name	Field Description	Mandatory
Hold Request Type	Used to indicate the hold request type that is used for creating a hold request.	Yes

4. Select the required hold request type from the **Hold Request Type** field.
5. Click **OK**.
   The **Hold Request** screen appears.
6. Enter the required details for an overdue process.
7. Click **Save**.
   A hold request is defined for an overdue process where the status of the hold request is set as **Draft**.

> **Note:**
>
> The **Hold Request** screen appears where you can view the details of the hold request.

Related Topics

For more information on...	See...
Delinquency Central screen	Delinquency Central (Used for Viewing) on page 2000
Hold Request screen	Hold Request (Used for Searching) on page 1920
How to search for an overdue process	Searching for an Overdue Process on page 2005

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Creating a Payment Arrangement for an Overdue Process

Procedure

To create a payment arrangement for an overdue process:

1. Search for the overdue process in the **Delinquency Central** screen.
2. In the **Search Results** section, select the check box corresponding to the **Overdue Process Information** column for whom you want to create a payment arrangement for an overdue process.
3. Click the **Create Payment Arrangement** button.
   The **Payment Arrangement** screen appears. It contains the following tabs:
   - **Main**
   - **History**
4. Enter the required details in the **Payment Arrangement** screen.
5. Click the **Save** button in the **Page Title** area of the **Payment Arrangement** screen.
   A payment arrangement is created with the respective payment arrangement contract.

Note: The **Payment Arrangement** screen appears with the details of the payment arrangement.

Related Topics

For more information on...	See...
Delinquency Central screen	Delinquency Central (Used for Viewing) on page 2000
How to search for an overdue process	Searching for an Overdue Process on page 2005

Defining a Promise To Pay for an Overdue Process

Procedure

To create a promise to pay for an overdue process:

1. Search for the overdue process in the **Delinquency Central** screen.
2. In the **Search Results** section, select the check box corresponding to the **Overdue Process Information** column for whom you want to define a promise to pay for an overdue process.
3. Click the **Create Promise To Pay** button.
   A message appears confirming that the promise to pay will be created for the account for which the overdue process is initiated.
4. Click **OK**.
   The **Promise To Pay** screen appears.
5. Enter the required details in the **Promise To Pay** screen.
6. Click the **Save** button in the **Page Title** area of the **Promise To Pay** screen.
   A promise to pay is created with the scheduled payment details.

Related Topics

For more information on...	See...
Delinquency Central screen	Delinquency Central (Used for Viewing) on page 2000
How to search for an overdue process	Searching for an Overdue Process on page 2005

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Chapter 29

Upload Request

Topics:

- Upload Request (Without Approval) Status Transition
- Upload Request (With Approval) Status Transition
- Mass Accounts' Bill Cycle Update
- Mass Contract Rider Update
- Mass Hold Request Creation
- Mass Refund Request Creation
- Mass Write Off Request Creation
- Mass Policy Reinstatement
- Mass Bill Group Sort Record Creation
- Mass Bill Group Derivation and Pricing Parameters Record Creation
- Mass Billable Charge Creation (Fully Insured Group and Individual)
- Mass Payment Tender Cancellation
- Mass Bill Cycle Rule Characteristic Creation or Modification
- Upload Request Type
- Upload Request (Used for Searching)
- Upload Request (Used for Viewing)

Oracle Revenue Management and Billing provides a generic upload feature that allows you to upload data to create or update multiple entities through an upload request. At present, the system supports only Comma-Separated Values (CSV) format and therefore you can upload the data only using the CSV file. Note that, at a time, a CSV file can have data to create or update a particular type of entities in the system. In other words, you cannot upload data for multiple types of entities (such as, hold request and billable charge) through a single CSV file.

Through an upload request, you can not only create or update the business object based entities but can also create or update the service-driven entities. If the lifecycle is defined for the entity business object, the status of entity is updated accordingly when the upload request is processed. If the approval process is configured for the upload request business object, the system will submit the upload request for approval before creating or updating the entities in the system. Similarly, if the approval process is configured for the entity business object, the system will submit the entity for approval once it is created using the uploaded data.

At present, the system allows you to upload data for creating the following entities - Billable Charges (for both the financial services and health insurance domains), Hold Requests, Refund Requests, Write Off Requests, Bill Group Sort Records, and Bill Group Derivation and Pricing Parameters Records. It also allows you to upload data for updating the following entities:

- Contract rider details of a contract
- Bill cycle of an account
- Bill cycle rule characteristic of an account

Note: The above mentioned entities, such as Bill Group Sort Record, Bill Group Derivation and Pricing Parameters Record, and Contract Rider are applicable only for the health insurance business.

In addition, you can reinstate multiple fully insured group policies and cancel payment tenders through the **Upload Request** feature.

While uploading a CSV file, you need to specify distinct upload request type using which you want to create the upload request. For more information, see Upload Request Type. An upload request goes through various statuses in its lifecycle. Note that lifecycle of an upload request is driven by the business object using which the upload request is created. We have shipped the following upload request business objects:

- Bill Cycle Update Upload (i.e., C1-BillCycleUpdateUplReq)
- Bill Group Derivation & Pricing Parameter (i.e., C1-BillLevelUploadRequest)
- Bill Group Sorting Upload Request (i.e., C1-BillGrpSortUploadRequest)
- Billable Charge Upload for Fully Insured (i.e., C1-BillableChargeUploadFI)

- Contract Rider Upload (i.e., C1-ContractRiderUpdateUplReq)
- Hold Request Upload (i.e., C1-HoldUploadRequest)
- Refund Request Upload (i.e., C1-RefundUploadRequest)
- Reinstatement Upload Request (i.e., C1-ReinstatementUploadRequest)
- Tender Cancelation Upload Request (i.e., C1-TndrCnclUploadRequest)
- Write Off Request Upload (i.e., C1-WriteOffUploadRequest)
- Bill Cycle Rule Characteristic Upload (i.e., C1-BillCycleRuleCharUpdUplReq)

Each upload request feature explained in this document is articulated based on the lifecycle and logic defined in the respective business object.

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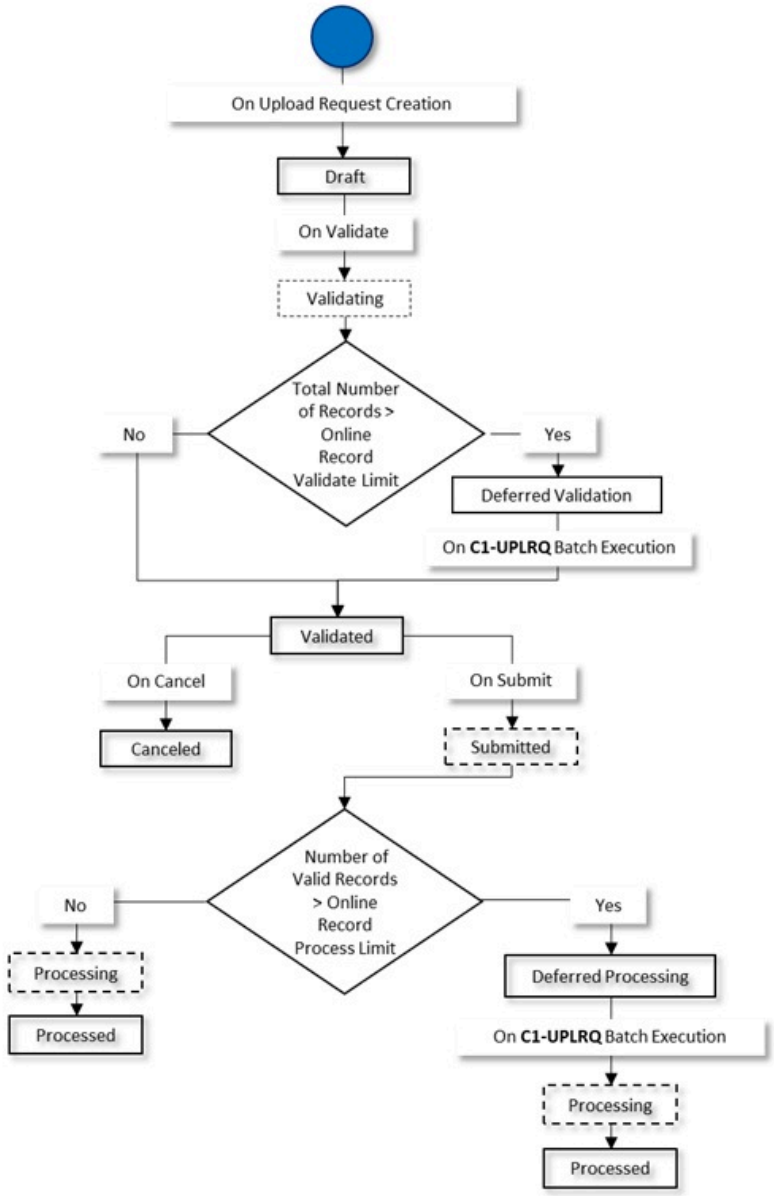
Upload Request (Without Approval) Status Transition

The following figure graphically indicates how an upload request moves from one status to another when the approval process is not configured in the upload request type:



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Note:

The **Deferred Validation** mechanism is only supported in those upload requests which are created using the following business objects:

- C1-HoldUploadRequest
- C1-RefundUploadRequest
- C1-WriteOffUploadRequest
- C1-BillLevelUploadRequest
- C1-BillableChargeUploadFI
- C1-TndrCnclUploadRequest

Therefore, these upload requests would transition from the **Draft** status to the **Validating** status and then to either the **Validated** or **Deferred Validation** status in its lifecycle. However, the upload requests created using the following business objects will directly move from the **Draft** status to the **Validated** status:

- C1-BillCycleUpdateUplReq
- C1-BillGrpSortUploadRequest
- C1-ContractRiderUpdateUplReq
- C1-ReinstatementUploadRequest
- C1-BillCycleRuleCharUpdUplReq

Upload Request (With Approval) Status Transition

The following figure graphically indicates how an upload request moves from one status to another when the approval process is configured in the upload request type:

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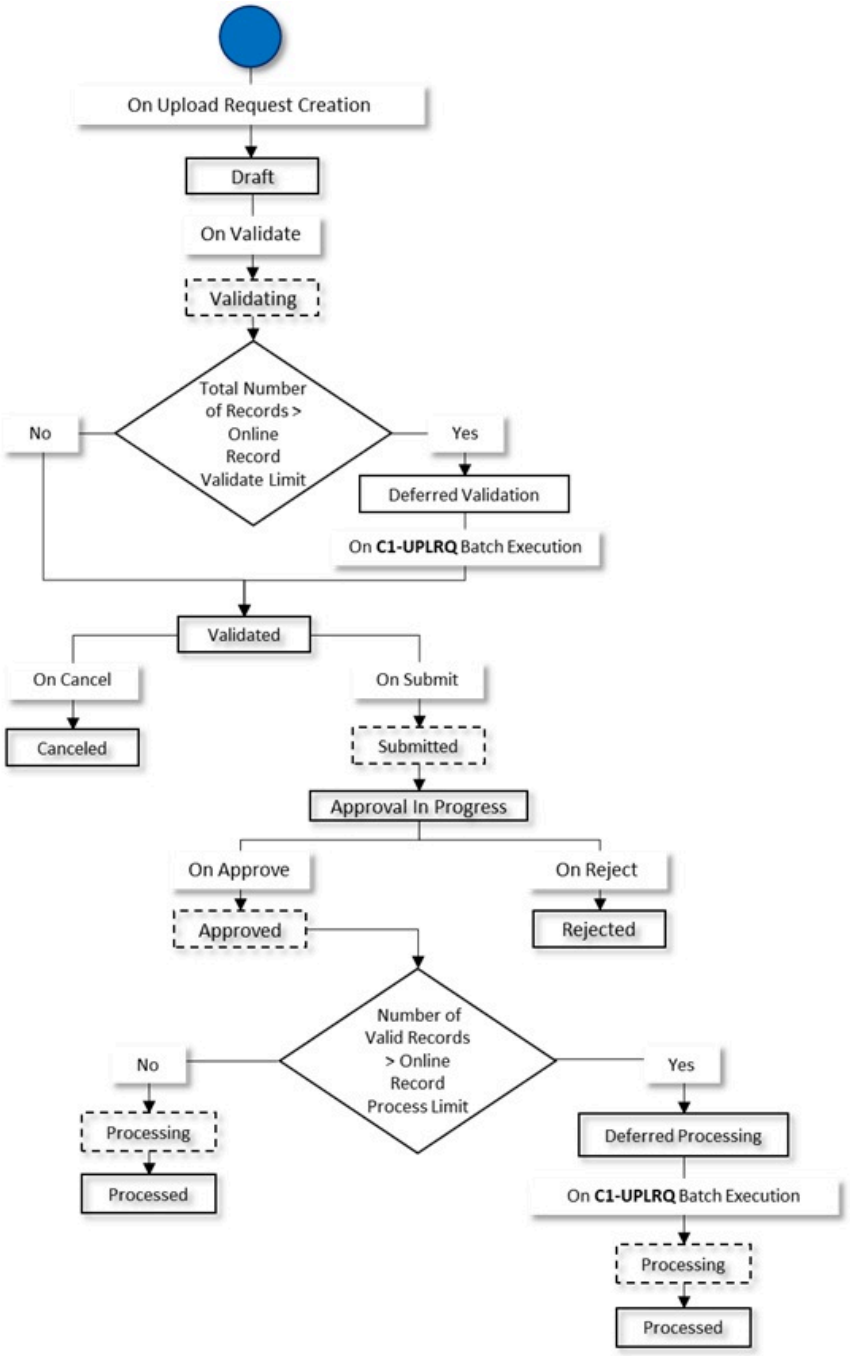

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Note:

The **Deferred Validation** mechanism is only supported in those upload requests which are created using the following business objects:

- C1-HoldUploadRequest
- C1-RefundUploadRequest
- C1-WriteOffUploadRequest
- C1-BillLevelUploadRequest
- C1-BillableChargeUploadFI
- C1-TndrCnclUploadRequest

Therefore, these upload requests would transition from the **Draft** status to the **Validating** status and then to either the **Validated** or **Deferred Validation** status in its lifecycle. However, the upload requests created using the following business objects will directly move from the **Draft** status to the **Validated** status:

- C1-BillCycleUpdateUplReq
- C1-BillGrpSortUploadRequest
- C1-ContractRiderUpdateUplReq
- C1-ReinstatementUploadRequest
- C1-BillCycleRuleCharUpdUplReq

Mass Accounts' Bill Cycle Update

Oracle Revenue Management and Billing provides the ability to update the bill cycle of multiple accounts at once through the **Upload Request** feature. The **C1-BillCycleUpdateUplReq** business object enables you to create an upload request for mass accounts' bill cycle update.

You need to create an upload request type for the **C1-BillCycleUpdateUplReq** business object. You can then upload a mass accounts' bill cycle update file in the CSV format using the respective upload request type. The mass accounts' bill cycle update file should contain records with the following information – account identifier details or account ID and bill cycle. For more information, see Mass Accounts' Bill Cycle Update CSV Format.

On uploading a mass accounts' bill cycle update file, the system creates an upload request in the **Draft** status. The data records are created in the **Pending** status. The system validates the following for each record:

- Either the account ID or account identifier type and account identifier is specified in the record.
- Bill cycle is specified in the record.

If the account ID is not specified in the record, the system derives the account ID using the respective account identifier type and account identifier combination. If the system could not derive the account ID using the account identifier type and account identifier combination, the status of the record is changed to **Invalid**. In addition, if any of the above validations fail, the status of the record is changed to **Invalid**.

Note:

If the bill cycle is missing in any record of the file, the system will not allow you to create an upload request.

The system does not allow you to upload a file which exceeds 700 KB. Therefore, you must ensure that the file size is within the maximum limit.

On clicking the **Validate** button, the system validates the following:

- The account ID given in the record is valid.
- The bill cycle given in the record is valid.
- The given bill cycle is associated to the division of the account.
- The two or more records with the same account ID do not exist in the upload request.

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Note:

If the account ID is invalid, the system derives the account ID using the respective account identifier type and account identifier combination. If the system could not derive the account ID using the account identifier type and account identifier combination, the status of the record is changed to **Invalid**.

If duplicate records exist in the upload request, the system validates and changes the status of one record to **Valid** and the status of the remaining records to **Invalid**.

If any of above validations fail, the status of the record is changed to **Invalid**. However, if all the above validations are successful, the status of the record is changed to **Valid**. Once all the pending records in the upload request are validated, the status of the upload request is changed to **Validated**.

On clicking the **Submit** button, the system checks whether the approval is required for the upload request. If the approval is required for the upload request, the status of the upload request is changed to **Approval In Progress**. However, if the approval is not required for the upload request, the status of the upload request is changed to **Submitted**.

The approver can either approve or reject the upload request based on the observations. On approving an upload request, the status of the upload request is changed to **Approved**. However, on rejecting an upload request, the status of the upload request is changed to **Rejected**.

Once the status of the upload request is changed to **Submitted** or **Approved**, the system checks whether the upload request must be processed in the real time (i.e., immediately) or in the deferred mode (i.e., in the background). If the number of valid records in the upload request does not exceed the online record process limit, the system changes the status of the upload request to **Processing**.

However, if the number of valid records in the upload request exceeds the online record process limit, the system changes the status of the upload request to **Deferred Processing**. The system then changes the status of the upload request from **Deferred Processing** to **Processing** when the **C1-UPLRQ** batch is executed.

Once the status of the upload request is changed to **Processing**, the system fetches a list of records which are in the **Valid** status. For each valid record, the system updates the bill cycle of the respective account.

Once the account is successfully updated, the status of the record is changed to **Processed**. However, if any error occurs while updating the account, the status of the record is changed to **Error**. Finally, the status of the upload request is changed to **Processed**.

Note:

The system updates the account using the entity business object specified in the respective upload request type.

This feature is tested and certified for both the financial services and health insurance domains.

Prerequisites

To setup the mass accounts' bill cycle update feature, you need to do the following:

- Define the required upload request type where the upload request business object is set to **C1-BillCycleUpdateUplReq**.
- Assign the **C1-BCUUR** To Do type to a To Do role whose users must receive a To Do while submitting an accounts' bill cycle update upload request for approval.
- Define the required characteristic types where the characteristic entity is set to **Upload Request Type**.
- Define the required characteristic types where the characteristic entity is set to **Upload Request**.
- Define the required foreign key reference for account (if not available) in the system.
- Define the status reasons for the **Canceled** and **Rejected** statuses of the **C1-BillCycleUpdateUplReq** business object in the **Status Reason** screen.
- Define the required account identifier types and bill cycles in the system.

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- Set the batch control type of the **Upload Request Periodic Monitor (C1-UPLRQ)** batch to **Timed** and define the following attributes:
  - Time Interval
  - Timer Active
  - User ID
  - Batch Language
  - Email Address

  For more information about this batch, see *Oracle Revenue Management and Billing Batch Guide*.

Algorithms Used in C1-BillCycleUpdateUplReq

The following table lists the algorithms which are used in the lifecycle of the **C1-BillCycleUpdateUplReq** business object:

Status	System Event	Algorithm	Algorithm Type	Description
Draft	Enter	C1-BCU-DERIV	C1-BCU-DERIV	Refer to C1-BCU-DERIV on page 2023.
Validated	Enter	C1-BCU-VALID	C1-BCU-VALID	Refer to C1-BCU-VALID on page 2023.
Canceled	-	-	-	-
Submitted	Enter	C1-UPLSUBENT	C1-UPLSUBENT	Refer to C1-UPLSUBENT on page 2023.
	Enter	C1-DEFERUPLD	C1-DEFERUPLD	Refer to C1-DEFERUPLD on page 2023.
	Monitor	F1-AT-RQJ	F1-GEN-BOMNJ	Refer to F1-AT-RQJ on page 225.
Approval In Progress	Enter	C1-UPLAPPENT	C1-UPLAPPENT	Refer to C1-UPLAPPENT on page 2024.
	Exit	C1-UPLAPPEXT	C1-UPLAPPEXT	Refer to C1-UPLAPPEXT on page 2024.
	Exit	F1-TODOCOMPL	F1-TODOCOMPL	Refer to F1-TODOCOMPL on page 1469.
Approved	Enter	C1-DEFERUPLD	C1-DEFERUPLD	Refer to C1-DEFERUPLD on page 2023.
	Monitor	F1-AT-RQJ	F1-GEN-BOMNJ	Refer to F1-AT-RQJ on page 225.
Rejected	-	-	-	-
Deferred Processing	Monitor	F1-AT-RQJ	F1-GEN-BOMNJ	Refer to F1-AT-RQJ on page 225.
Processing	Enter	C1-BCU-PROC	C1-BCU-PROC	Refer to C1-BCU-PROC on page 2024.
	Monitor	F1-AT-RQJ	F1-GEN-BOMNJ	Refer to F1-AT-RQJ on page 225.
Processed	-	-	-	-

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C1-BCU-DERIV

This algorithm reads the data in the BO_DATA_AREA column of the C1_UPL_REQUEST table and accordingly inserts the records in the C1_UPLOAD_REQ_DTLS table. In addition, the status of each record in the C1_UPLOAD_REQ_DTLS table is set to **Pending**.

It validates the following:

- Either the account ID or account identifier type and account identifier is specified in the record.
- Bill cycle is specified in the record.

If the account ID is not specified in the record, it derives the account ID using the respective account identifier type and account identifier combination. Once the account ID is derived, the corresponding record is updated in the C1_UPLOAD_REQ_DTLS table. If the system could not derive the account ID using the account identifier type and account identifier combination, the status of the record in the C1_UPLOAD_REQ_DTLS table is changed to **Invalid**. In addition, if any of the above validations fail, the status of the record in the C1_UPLOAD_REQ_DTLS table is changed to **Invalid**.

This algorithm also derives the fields which can be used as search filters based on the mapping defined in the respective upload request type.

C1-BCU-VALID

This algorithm is invoked when the user clicks the **Validate** button. It validates the records which are in the **Pending** status. It validates the following:

- The account ID given in the record is valid.

  Note: If the account ID is invalid, it derives the account ID using the respective account identifier type and account identifier combination. Once the account ID is derived, the corresponding record is updated in the C1_UPLOAD_REQ_DTLS table. If the system could not derive the account ID using the account identifier type and account identifier combination, the status of the record in the C1_UPLOAD_REQ_DTLS table is changed to **Invalid**.
- The bill cycle given in the record is valid.
- The given bill cycle is associated to the division of the account.
- The two or more records with the same account ID do not exist in the upload request.

  Note: If duplicate records exist in the upload request, it validates and changes the status of one record to **Valid** and the status of the remaining records to **Invalid**.

If any of above validations fail, the status of the record in the C1_UPLOAD_REQ_DTLS table is changed to **Invalid**. However, if all the above validations are successful, the status of the record in the C1_UPLOAD_REQ_DTLS table is changed to **Valid**. Once all the pending records in the upload request are validated, the status of the upload request is changed to **Validated**.

Note: If there are no pending records while validating an upload request, a message appears indicating that there are no records to be validated. In such case, you can only delete an upload request.

C1-UPLSUBENT

This algorithm is invoked when the user clicks the **Submit** button. It checks whether the approval is required for the upload request. If the approval is required for the upload request, the status of the upload request is changed to **Approval In Progress**. However, if the approval is not required for the upload request, the status of the upload request is changed to **Submitted**.

C1-DEFERUPLD

This algorithm is invoked when the status of the upload request is changed to **Submitted** or **Approved**. It checks whether the upload request must be processed in the real time (i.e., immediately) or in the deferred mode (i.e., in the background). If the number of valid records in the upload request does not exceed the online record process limit, it changes the status

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of the upload request to **Processing**. However, if the number of valid records in the upload request exceeds the online record process limit, it changes the status of the upload request to **Deferred Processing**.

It contains the following parameter:

- **Online Record Process Limit** - Used to indicate the maximum number of valid records you can process in the real time (i.e., immediately). This parameter is mandatory.

F1-AT-RQJ

This algorithm transitions the current status of the business object to the specified status. It contains the following parameters:

- **Next Status** – Used when you want to override the default next status specified in the lifecycle.
- **Next Transition Condition** – Used when you want to override the default next transition condition specified in the lifecycle.

At a time, you can specify value for either the **Next Status** or **Next Transition Condition** parameter. If you don't specify any value for these parameters, the system will transition the business object to the default next status specified in its lifecycle.

C1-UPLAPPENT

This algorithm is invoked when the status of the upload request is changed to **Approval In Progress**. It creates a To Do using the approval To Do type that is specified in the respective upload request type. Once a To Do is created, it is assigned to all the users with the approval To Do role that is specified in the respective upload request type. In addition, it creates a log entry for the upload request when the To Do is created for the approver.

C1-UPLAPPEXT

This algorithm is invoked when the user clicks the **Approve** or **Reject** button. It checks whether the approver is associated with the approval To Do role specified in the respective upload request type. If not, it does not allow the approver to approve or reject the upload request. In addition, it does not allow the submitter to approve or reject the upload request.

F1-TODOCOMPL

This algorithm completes the To Do entries that are linked to an object when the object exits the given status. It finds and completes all open To Do entries where the business object's primary key is defined as a drill key. However, if the **Exclude To Do Entries From Auto Completion** (**F1-EXLTD**) characteristic is set to **Y** for a To Do type, the system does not automatically complete the respective To Do entry.

This algorithm contains the following parameter:

- **'Do Not Complete To Do Type' Char Type** – Used to specify the characteristic type that indicates whether the To Do entries should be automatically completed or not.

> **Note:** The **F1-EXLTD** characteristic type is shipped with the product. You can either use the **F1-EXLTD** characteristic type or a custom characteristic type, if required. Note that you must specify a predefined characteristic type where the characteristic entity is set to **To Do Type** and the predefined values are set to **Y** or **N**.

C1-BCU-PROC

This algorithm is invoked when the status of the upload request is changed to **Processing**. It fetches a list of records which are in the **Valid** status. For each valid record, this algorithm updates the bill cycle of the account.

> **Note:** The system updates the account using the entity business object specified in the respective upload request type.

If the record is successfully processed, the status of the record is changed to **Processed**. However, if the record could not be processed successfully due to any reason, the status of the record is changed to **Error**. Finally, the status of the upload request is changed to **Processed**.

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Mass Accounts' Bill Cycle Update CSV Format

The following table lists and describes the columns that should be available in the CSV file while updating bill cycle of multiple accounts at once through an upload request:

Sr. No.	Column Name	Description	Mandatory (Yes or No)
1	Account Identifier Type	Used to specify the account identifier type. **Note:** You must specify an account identifier type which is already defined in the system.	Yes (Conditional) **Note:** This data is required when the account ID is not specified in the record.
2	Account Identifier	Used to specify the account identifier. **Note:** The system derives the account using the given account identifier type and account identifier combination when the account ID is either not specified or is invalid in the record.	Yes (Conditional) **Note:** This data is required when the account ID is not specified in the record.
3	Account ID	Used to indicate the account whose bill cycle you want to update.	Yes (Conditional) **Note:** This data is required when the account identifier type and account identifier are not specified in the record.
4	Bill Cycle	Used to specify the bill cycle. **Note:** You must specify a bill cycle which is already defined in the system. In addition, you must ensure that the specified bill cycle is already associated with the division of the account.	Yes

Note:

The CSV file should contain the columns in the above mentioned sequence.

Before uploading the file, ensure that the column headers specified in the CSV file are mapped to the schema of the respective upload request business object through data mapping in the upload request type. Otherwise, erroneous results might occur. For more information, see Mapping Data and Configuring Filters for an Upload Request Type on page 1433.

Sample Mass Accounts' Bill Cycle Update CSV File

```
Account Identifier Type,Account Identifier,Account ID,Bill Cycle
,,6566765667,BC01
IBAN,XX 80 WEST 123456 98765432,,BC02
```

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Mass Contract Rider Update

Oracle Revenue Management and Billing provides the ability to update the contract rider information of multiple contracts at once through the **Upload Request** feature. The **C1-ContractRiderUpdateUplReq** business object enables you to create an upload request for mass contract rider update.

You need to create an upload request type for the **C1-ContractRiderUpdateUplReq** business object. You can then upload a mass contract rider update file in the CSV format using the respective upload request type. The mass contract rider update file should contain records with the following information – Contract ID or account details and contract type, start end, end date, and bill factor. Note that you can only specify a bill factor where the **Contract Rider Applicability** option is selected. For more information, see Mass Contract Rider Update CSV Format.

On uploading a mass contract rider update file, the system creates an upload request in the **Draft** status. The data records are created in the **Pending** status. The system validates the following for each record:

- Either the contract ID or account details and contract type are specified in the record.
- Either the account ID or account identifier type and account identifier is specified in the record.
- Start date and bill factor are specified in the record.

If the account ID is not specified in the record, the system derives the account ID using the respective account identifier type and account identifier combination. If the system could not derive the account ID using the account identifier type and account identifier combination, the status of the record is changed to **Invalid**. In addition, if any of the above validations fail, the status of the record is changed to **Invalid**.

Note:

If the start date and bill factor are missing in any record of the file, the system will not allow you to create an upload request.

The system does not allow you to upload a file which exceeds 700 KB. Therefore, you must ensure that the file size is within the maximum limit.

On clicking the **Validate** button, the system validates the following:

- The account ID given in the record is valid.
- The contract ID given in the record is valid.
- The contract type given in the record is valid.
- The bill factor given in the record is valid.
- If both the account ID and contract ID are given in the record, the contract belongs to the account.
- The contract type is defined for the division to which the account belongs.
- The **Contract Rider Applicability** flag of the bill factor is set to **Y**.
- The two or more records with the same contract ID or account ID and contract type combination do not exist in the upload request.

Note:

If the account ID is invalid, the system derives the account ID using the respective account identifier type and account identifier combination. If the system could not derive the account ID using the account identifier type and account identifier combination, the status of the record is changed to **Invalid**.

If duplicate records exist in the upload request, the system validates and changes the status of one record to **Valid** and the status of the remaining records to **Invalid**.

If any of above validations fail, the status of the record is changed to **Invalid**. However, if all the above validations are successful, the status of the record is changed to **Valid**. Once all the pending records in the upload request are validated, the status of the upload request is changed to **Validated**.

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On clicking the **Submit** button, the system checks whether the approval is required for the upload request. If the approval is required for the upload request, the status of the upload request is changed to **Approval In Progress**. However, if the approval is not required for the upload request, the status of the upload request is changed to **Submitted**.

The approver can either approve or reject the upload request based on the observations. On approving an upload request, the status of the upload request is changed to **Approved**. However, on rejecting an upload request, the status of the upload request is changed to **Rejected**.

Once the status of the upload request is changed to **Submitted** or **Approved**, the system checks whether the upload request must be processed in the real time (i.e., immediately) or in the deferred mode (i.e., in the background). If the number of valid records in the upload request does not exceed the online record process limit, the system changes the status of the upload request to **Processing**. However, if the number of valid records in the upload request exceeds the online record process limit, the system changes the status of the upload request to **Deferred Processing**. The system then changes the status of the upload request from **Deferred Processing** to **Processing** when the **C1-UPLRQ** batch is executed.

Once the status of the upload request is changed to **Processing**, the system fetches a list of records which are in the **Valid** status. For each valid record, the system checks whether the contract ID is specified in the record. If so, it updates the contract rider information of the respective contract. However, if the contract ID is not specified in the record, the system derives the active contracts of the account which are created using the given contract type. For each such derived contract, the system updates the contract rider information. However, if there are no active contracts of the respective contract type for the account, the status of the record is changed to **Error**.

Once the contract is successfully updated, the status of the record is changed to **Processed**. However, if any error occurs while updating the contract, the status of the record is changed to **Error**. Finally, the status of the upload request is changed to **Processed**.

Note:

The system updates the contract using the entity business object specified in the respective upload request type.

You can then view the contract rider information of the contract in the **Rate Info** tab of the **Contract** screen.

This feature is tested and certified for the health insurance domain.

Prerequisites

To setup the mass contract rider update feature, you need to do the following:

- Define the required upload request type where the upload request business object is set to **C1-ContractRiderUpdateUplReq**.
- Assign the **C1-CRUUR** To Do type to a To Do role whose users must receive a To Do while submitting a contract rider update upload request for approval.
- Define the required characteristic types where the characteristic entity is set to **Upload Request Type**.
- Define the required characteristic types where the characteristic entity is set to **Upload Request**.
- Define the required foreign key reference for contract (if not available) in the system.
- Define the status reasons for the **Canceled** and **Rejected** statuses of the **C1-ContractRiderUpdateUplReq** business object in the **Status Reason** screen.
- Define the required account identifier types, contract types, and bill factors in the system.
- Set the batch control type of the **Upload Request Periodic Monitor (C1-UPLRQ)** batch to **Timed** and define the following attributes:
    - Time Interval
    - Timer Active
    - User ID
    - Batch Language
    - Email Address

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For more information about this batch, see *Oracle Revenue Management and Billing Batch Guide*.

Algorithms Used in C1-ContractRiderUpdateUplReq

The following table lists the algorithms which are used in the lifecycle of the **C1-ContractRiderUpdateUplReq** business object:

Status	System Event	Algorithm	Algorithm Type	Description
Draft	Enter	C1-CR-DERIV	C1-CR-DERIV	Refer to C1-CR-DERIV on page 2028.
Validated	Enter	C1-CR-VALID	C1-CR-VALID	Refer to C1-CR-VALID on page 2029.
Canceled	-	-	-	-
Submitted	Enter	C1-UPLSUBENT	C1-UPLSUBENT	Refer to C1-UPLSUBENT on page 2023.
	Enter	C1-DEFERUPLD	C1-DEFERUPLD	Refer to C1-DEFERUPLD on page 2023.
	Monitor	F1-AT-RQJ	F1-GEN-BOMNJ	Refer to F1-AT-RQJ on page 225.
Approval In Progress	Enter	C1-UPLAPPENT	C1-UPLAPPENT	Refer to C1-UPLAPPENT on page 2024.
	Exit	C1-UPLAPPEXT	C1-UPLAPPEXT	Refer to C1-UPLAPPEXT on page 2024.
	Exit	F1-TODOCOMPL	F1-TODOCOMPL	Refer to F1-TODOCOMPL on page 1469.
Approved	Enter	C1-DEFERUPLD	C1-DEFERUPLD	Refer to C1-DEFERUPLD on page 2023.
	Monitor	F1-AT-RQJ	F1-GEN-BOMNJ	Refer to F1-AT-RQJ on page 225.
Rejected	-	-	-	-
Deferred Processing	Monitor	F1-AT-RQJ	F1-GEN-BOMNJ	Refer to F1-AT-RQJ on page 225.
Processing	Enter	C1-CR-PROC	C1-CR-PROC	Refer to C1-CR-PROC on page 2030.
	Monitor	F1-AT-RQJ	F1-GEN-BOMNJ	Refer to F1-AT-RQJ on page 225.
Processed	-	-	-	-

C1-CR-DERIV

This algorithm reads the data in the BO_DATA_AREA column of the C1_UPL_REQUEST table and accordingly inserts the records in the C1_UPLOAD_REQ_DTLS table. In addition, the status of each record in the C1_UPLOAD_REQ_DTLS table is set to **Pending**.

It validates the following:

- Either the contract ID or account details and contract type are specified in the record.
- Either the account ID or account identifier type and account identifier is specified in the record.
- Start date and bill factor are specified in the record.

If the account ID is not specified in the record, it derives the account ID using the respective account identifier type and account identifier combination. Once the account ID is derived, the corresponding record is updated in the C1_UPLOAD_REQ_DTLS table. If the system could not derive the account ID using the account identifier type and

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account identifier combination, the status of the record in the C1_UPLOAD_REQ_DTLS table is changed to **Invalid**. In addition, if any of the above validations fail, the status of the record in the C1_UPLOAD_REQ_DTLS table is changed to **Invalid**.

This algorithm also derives the fields which can be used as search filters based on the mapping defined in the respective upload request type.

C1-CR-VALID

This algorithm is invoked when the user clicks the **Validate** button. It validates the records which are in the **Pending** status. It validates the following:

- The account ID given in the record is valid.

  Note: If the account ID is invalid, it derives the account ID using the respective account identifier type and account identifier combination. Once the account ID is derived, the corresponding record is updated in the C1_UPLOAD_REQ_DTLS table. If the system could not derive the account ID using the account identifier type and account identifier combination, the status of the record in the C1_UPLOAD_REQ_DTLS table is changed to **Invalid**.
- The contract ID given in the record is valid.
- The contract type given in the record is valid.
- The bill factor given in the record is valid.
- If both the account ID and contract ID are given in the record, the contract belongs to the account.
- The contract type is defined for the division to which the account belongs.
- The **Contract Rider Applicability** flag of the bill factor is set to **Y**.
- The two or more records with the same contract ID or account ID and contract type combination do not exist in the upload request.

  Note: If duplicate records exist in the upload request, it validates and changes the status of one record to **Valid** and the status of the remaining records to **Invalid**.

If any of above validations fail, the status of the record in the C1_UPLOAD_REQ_DTLS table is changed to **Invalid**. However, if all the above validations are successful, the status of the record in the C1_UPLOAD_REQ_DTLS table is changed to **Valid**. Once all the pending records in the upload request are validated, the status of the upload request is changed to **Validated**.

Note: If there are no pending records while validating an upload request, a message appears indicating that there are no records to be validated. In such case, you can only delete an upload request.

C1-UPLSUBENT

This algorithm is invoked when the user clicks the **Submit** button. It checks whether the approval is required for the upload request. If the approval is required for the upload request, the status of the upload request is changed to **Approval In Progress**. However, if the approval is not required for the upload request, the status of the upload request is changed to **Submitted**.

C1-DEFERUPLD

This algorithm is invoked when the status of the upload request is changed to **Submitted** or **Approved**. It checks whether the upload request must be processed in the real time (i.e., immediately) or in the deferred mode (i.e., in the background). If the number of valid records in the upload request does not exceed the online record process limit, it changes the status of the upload request to **Processing**. However, if the number of valid records in the upload request exceeds the online record process limit, it changes the status of the upload request to **Deferred Processing**.

It contains the following parameter:

- **Online Record Process Limit** - Used to indicate the maximum number of valid records you can process in the real time (i.e., immediately). This parameter is mandatory.

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F1-AT-RQJ

This algorithm transitions the current status of the business object to the specified status. It contains the following parameters:

- **Next Status** – Used when you want to override the default next status specified in the lifecycle.
- **Next Transition Condition** – Used when you want to override the default next transition condition specified in the lifecycle.

At a time, you can specify value for either the **Next Status** or **Next Transition Condition** parameter. If you don't specify any value for these parameters, the system will transition the business object to the default next status specified in its lifecycle.

C1-UPLAPPENT

This algorithm is invoked when the status of the upload request is changed to **Approval In Progress**. It creates a To Do using the approval To Do type that is specified in the respective upload request type. Once a To Do is created, it is assigned to all the users with the approval To Do role that is specified in the respective upload request type. In addition, it creates a log entry for the upload request when the To Do is created for the approver.

C1-UPLAPPEXT

This algorithm is invoked when the user clicks the **Approve** or **Reject** button. It checks whether the approver is associated with the approval To Do role specified in the respective upload request type. If not, it does not allow the approver to approve or reject the upload request. In addition, it does not allow the submitter to approve or reject the upload request.

F1-TODOCOMPL

This algorithm completes the To Do entries that are linked to an object when the object exits the given status. It finds and completes all open To Do entries where the business object's primary key is defined as a drill key. However, if the **Exclude To Do Entries From Auto Completion** (**F1-EXLTD**) characteristic is set to **Y** for a To Do type, the system does not automatically complete the respective To Do entry.

This algorithm contains the following parameter:

- **'Do Not Complete To Do Type' Char Type** – Used to specify the characteristic type that indicates whether the To Do entries should be automatically completed or not.

> **Note:** The **F1-EXLTD** characteristic type is shipped with the product. You can either use the **F1-EXLTD** characteristic type or a custom characteristic type, if required. Note that you must specify a predefined characteristic type where the characteristic entity is set to **To Do Type** and the predefined values are set to **Y** or **N**.

C1-CR-PROC

This algorithm is invoked when the status of the upload request is changed to **Processing**. It fetches a list of records which are in the **Valid** status. For each valid record, this algorithm checks whether the contract ID is specified in the record. If so, it updates the contract rider information of the respective contract. However, if the contract ID is not specified in the record, this algorithm derives the active contracts of the account which are created using the given contract type. For each such derived contract, this algorithm updates the contract rider information. However, if there are no active contracts of the respective contract type for the account, the status of the record is changed to **Error**.

> **Note:** The system updates the contract using the entity business object specified in the respective upload request type.

If the record is successfully processed, the status of the record is changed to **Processed**. However, if the record could not be processed successfully due to any reason, the status of the record is changed to **Error**. Finally, the status of the upload request is changed to **Processed**.

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Mass Contract Rider Update CSV Format

The following table lists and describes the columns that should be available in the CSV file while updating contract rider information of multiple contracts at once through an upload request:

Sr. No.	Column Name	Description	Mandatory (Yes or No)
1	Account Identifier Type	Used to specify the account identifier type. **Note:** You must specify an account identifier type which is already defined in the system.	Yes (Conditional) **Note:** This data is required when the account ID and contract ID are not specified in the record.
2	Account Identifier	Used to specify the account identifier. **Note:** The system derives the account using the given account identifier type and account identifier combination when the account ID is either not specified or is invalid in the record.	Yes (Conditional) **Note:** This data is required when the account ID and contract ID are not specified in the record.
3	Account ID	Used to indicate the account whose contract you want to update.	Yes (Conditional) **Note:** This data is required when the following conditions are met: • Account identifier type and account identifier are not specified in the record. • Contract ID is not specified in the record.
4	Contract Type	Used to indicate the type of contracts whose details you want to update. **Note:** If the contract ID is not specified in the record, the system derives the active contracts of the account which are created using the specified contract type, and then updates the contract rider information of the respective contracts. You must specify a contract type which is already defined in the system.	Yes (Conditional) **Note:** This data is required when the contract ID is not specified in the record.
5	Contract ID	Used to indicate the contract whose contract rider details you want to update.	No
6	Start Date	Used to specify the date from when the bill factor is effective for the contract.	Yes

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Sr. No.	Column Name	Description	Mandatory (Yes or No)
		Note: You must specify the date in the **YYYY-MM-DD** format. The start date cannot be later than the end date.	
7	End Date	Used to specify the date till when the bill factor is effective for the contract. **Note:** You must specify the date in the **YYYY-MM-DD** format. The end date cannot be earlier than the start date.	No
8	Bill Factor	Used to specify the bill factor. **Note:** You must specify a valid bill factor where the **Contract Rider Applicability** flag is set to **Y**.	Yes

Note:

The CSV file should contain the columns in the above mentioned sequence.

Before uploading the file, ensure that the column headers specified in the CSV file are mapped to the schema of the respective upload request business object through data mapping in the upload request type. Otherwise, erroneous results might occur. For more information, see Mapping Data and Configuring Filters for an Upload Request Type on page 1433.

Sample Mass Contract Rider Update CSV File

```
Account Identifier Type,Account Identifier,Account ID,Contract Type,Contract ID,Start Date,End Date,Bill Factor
,,2304864786,CT01,,2025-01-01,2025-12-31,BF01
,,2304864768,,CC01,2025-01-01,2025-06-31,BF02
```

Mass Hold Request Creation

Oracle Revenue Management and Billing provides the ability to create multiple hold requests at once through the **Upload Request** feature. The system allows you to hold certain processes at the person, account, or bill level through a hold request. You need to specify a period (i.e., duration) for which the hold request is initiated. Depending on the entity level, you need to add the entities, such as persons, accounts, or bills in the hold request. You need to define a period for which you want to keep the entities on hold. The hold entity period should be within the hold request period. Similarly, depending on the entity level, you need to add the processes, such as bill generation, overdue, auto pay, funding, delinquency, or refund, respectively, that you want to keep on hold for the entity through the hold request. The system will hold the process for the entity when the entity date range falls within the respective process date range. You can create multiple hold requests for the same entity with different hold reasons. The **C1-HoldUploadRequest** business object enables you to create an upload request for mass hold request creation.

You need to create an upload request type for the **C1-HoldUploadRequest** business object. You can then upload a mass hold request creation file in the CSV format using the respective upload request type. The mass hold request creation

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file should contain records with the following information – hold request type, hold request start date, hold request end date, hold reason, hold entity, hold entity start date, hold entity end date, hold processes, hold process start date, hold process end date, and hold characteristics. For more information, see Mass Hold Request Creation CSV Format.

Note:

You can specify maximum 5 characteristics in the record.

You cannot put partial hold on a bill through an upload request. The entire outstanding amount of the bill will be kept on hold.

On uploading a mass hold request creation file, the system creates an upload request in the **Draft** status. The data records are created in the **Pending** status. The system validates the following for each record:

- Hold request type, hold request start date, hold request end date, hold reason, and hold entity are specified in the record.
- If the hold entity is **ACCT**, either the account ID or account identifier type and account identifier is specified in the record.
- If the hold entity is **PERS**, either the person ID or person identifier type and person identifier is specified in the record.
- If the hold entity is **BILL**, the bill ID is specified in the record.

If the hold entity is **ACCT** and the entity ID is not specified in the record, the system derives the account ID using the respective account identifier type and account identifier combination. Similarly, if the hold entity is **PERS** and the entity ID is not specified in the record, the system derives the person ID using the respective person identifier type and person identifier combination. If the system could not derive the account ID using the account identifier type and account identifier combination or if the system could not derive the person ID using the person identifier type and person identifier combination, the status of the record is changed to **Invalid**. In addition, if any of the above validations fail, the status of the record is changed to **Invalid**.

Note:

If the mandatory data is missing in any record of the file, the system will not allow you to create an upload request.

The system does not allow you to upload a file which exceeds 700 KB. Therefore, you must ensure that the file size is within the maximum limit.

On clicking the **Validate** button, the system checks whether the upload request must be validated in the real time (i.e., immediately) or in the deferred mode (i.e., in the background). If the total number of records in the upload request does not exceed the online record validate limit, the system validates the following in the real time:

- The hold request type given in the record is valid and active in the system.
- The hold reason is a valid and active value of the **HOLD_REASON_FLG** lookup field.
- The hold entity is a valid and active value of the **HOLD_ENTITY_LVL_FLG** lookup field.
- The account ID given in the record is valid when the hold entity is **ACCT**.
- The person ID given in the record is valid when the hold entity is **PERS**.
- The bill ID given in the record is valid when the hold entity is **BILL**, and the outstanding amount of the bill is not equal to zero.
- The process's start and end dates are within the hold request start and end dates.
- The entity's start and end dates are within the hold request start and end dates.
- The entity's start and end dates should fall within at least one process's start and end dates.
- At least one process is kept on hold for the entity in the record.
- The value of each hold process in the record is set to either **Y** or **N**.
- The hold request start and end dates are set to either the system date or a future date.
- The start dates are not later than the end dates and the end dates are not earlier than the start dates.
- The same entity is not already kept on hold with the same hold reason through an existing draft or active hold request.
- The **Overdue**, **Auto Pay**, and **Refund** processes are not set to **Y** when the hold entity is set to **PERS**.

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- The **Bill Generation**, **Overdue**, **Auto Pay**, **Refund**, and **Delinquency** processes are not set to **Y** when the hold entity is set to **BILL**.
- Both the **Overdue** and **Delinquency** processes are not set to **Y** at the same time in the record.

Note: The **Overdue** process is valid for the financial services and health insurance domains, but the **Delinquency** process is valid only for the health insurance domain.

- The characteristic type given in the record is valid and its characteristic entity is set to **Hold Request**.
- The adhoc characteristic values are validated as per the validations defined in the respective algorithm.
- The predefined characteristic value is already defined for the characteristic type.
- The foreign key reference characteristic value is valid.
- The two or more records with the same entity ID do not exist in the upload request.

Note:

If the account ID is invalid, the system derives the account ID using the respective account identifier type and account identifier combination. If the system could not derive the account ID using the account identifier type and account identifier combination, the status of the record is changed to **Invalid**.

If the person ID is invalid, the system derives the person ID using the respective person identifier type and person identifier combination. If the system could not derive the person ID using the person identifier type and person identifier combination, the status of the record is changed to **Invalid**.

If duplicate records exist in the upload request, the system validates and changes the status of one record to **Valid** and the status of the remaining records to **Invalid**.

If any of above validations fail, the status of the record is changed to **Invalid**. However, if all the above validations are successful, the status of the record is changed to **Valid**. Once all the pending records in the upload request are validated, the status of the upload request is changed to **Validated**.

However, if the total number of records in the upload request exceeds the online record validate limit, the system changes the status of the upload request to **Deferred Validation**. The system then validates the records and changes the status of the upload request from **Deferred Validation** to **Validated** when the **C1-UPLRQ** batch is executed.

On clicking the **Submit** button, the system checks whether the approval is required for the upload request. If the approval is required for the upload request, the status of the upload request is changed to **Approval In Progress**. However, if the approval is not required for the upload request, the status of the upload request is changed to **Submitted**.

The approver can either approve or reject the upload request based on the observations. On approving an upload request, the status of the upload request is changed to **Approved**. However, on rejecting an upload request, the status of the upload request is changed to **Rejected**.

Once the status of the upload request is changed to **Submitted** or **Approved**, the system checks whether the upload request must be processed in the real time (i.e., immediately) or in the deferred mode (i.e., in the background). If the number of valid records in the upload request does not exceed the online record process limit, the system changes the status of the upload request to **Processing**. However, if the number of valid records in the upload request exceeds the online record process limit, the system changes the status of the upload request to **Deferred Processing**. The system then changes the status of the upload request from **Deferred Processing** to **Processing** when the **C1-UPLRQ** batch is executed.

Once the status of the upload request is changed to **Processing**, the system fetches a list of records which are in the **Valid** status. For each valid record with a unique combination of the hold request type, hold request start date, hold request end date, hold reason, hold entity, hold entity start date, hold entity end date, comments, hold process details, and hold characteristic details, the system creates a hold request for the entity (i.e., person, account, or bill). However, if there are multiple entity IDs with the same combination, the system adds all the entities in the same hold request.

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Note: If the **Include Hierarchy** flag is set to **Y** in the record where the entity level is set to **Person**, the system includes all the accounts of the person's hierarchy in the hold request. Note that the system considers only the child persons and not the grandchild persons from the person's hierarchy and then derives the accounts where the child person is the main customer. However, if the **Include Hierarchy** flag is set to **N** in the record where the entity level is set to **Person**, the system includes only the persons' immediate accounts in the hold request.

If the **Activation Approval** option is selected in the respective hold request type, the status of the hold request is set to **Activation Approval In Progress**. However, if the **Activation Approval** option is not selected in the respective hold request type, the system checks the number of entities added in the hold request. If the number of entities added in the hold request does not exceed the defer processing count (specified in the hold request type), the status of the hold request is set to **Active**. However, if the number of entities added in the hold request exceeds the defer processing count, the status of the hold request is set to **Deferred Processing**.

Once the hold request is successfully created, the status of the record is changed to **Processed**. However, if any error occurs while creating the hold request, the status of the record is changed to **Error**. Finally, the status of the upload request is changed to **Processed**.

Note:

The system creates the hold request using the entity business object specified in the respective upload request type.

This feature is tested and certified for both the financial services and health insurance domains.

You cannot add entities and processes in the hold request from the user interface when it is created through the **Upload Request** feature.

While creating a hold request through the **Upload Request** feature, the system sets the creation mode of the hold request to **Automatic**.

The approver does not have the option to request the submitter to resubmit the hold activation request when the hold request is created through the **Upload Request** feature. Therefore, if an approver finds some invalid data in the hold request (created via an upload request), the approver must reject such hold request.

Prerequisites

To setup the mass hold request creation feature, you need to do the following:

- Define the required upload request type where the upload request business object is set to **C1-HoldUploadRequest**.
- Assign the **C1-HLDUR** To Do type to a To Do role whose users must receive a To Do while submitting a hold request creation upload request for approval.
- Define the required characteristic types where the characteristic entity is set to **Upload Request Type**.
- Define the required characteristic types where the characteristic entity is set to **Upload Request**.
- Define the required foreign key reference for hold request (if not available) in the system.
- Define the status reasons for the **Canceled** and **Rejected** statuses of the **C1-HoldUploadRequest** business object in the **Status Reason** screen.
- Define the required hold request types in the system.
- Define the required person or account identifier types in the system.
- Ensure that the entities (i.e., person, account, or bill) that you want to keep on hold through a hold request should exist in the system.
- Define the required values for the **HOLD_REASON_FLG**, **HOLD_ENTITY_LVL_FLG**, and **HOLD_PROCESS_FLG** lookup fields.
- Define the required characteristic types where the characteristic entity is set to **Hold Request**.
- Set the batch control type of the **Upload Request Periodic Monitor (C1-UPLRQ)** batch to **Timed** and define the following attributes:
  - Time Interval
  - Timer Active

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- User ID
- Batch Language
- Email Address

For more information about this batch, see *Oracle Revenue Management and Billing Batch Guide*.

Algorithms Used in C1-HoldUploadRequest

The following table lists the algorithms which are used in the lifecycle of the **C1-HoldUploadRequest** business object:

Status	System Event	Algorithm	Algorithm Type	Description
Draft	Enter	C1-HLD-DERIV	C1-HLD-DERIV	Refer to C1-HLD-DERIV on page 2037.
Validating	Enter	C1-DEFERVALD	C1-DEFERVALD	Refer to C1-DEFERVALD on page 2037.
Deferred Validation	Monitor	F1-AT-RQJ	F1-GEN-BOMNJ	Refer to F1-AT-RQJ on page 225.
Validated	Enter	C1-HLD-VALID	C1-HLD-VALID	Refer to C1-HLD-VALID on page 2037.
Canceled	-	-	-	-
Submitted	Enter	C1-UPLSUBENT	C1-UPLSUBENT	Refer to C1-UPLSUBENT on page 2023.
	Enter	C1-DEFERUPLD	C1-DEFERUPLD	Refer to C1-DEFERUPLD on page 2023.
	Monitor	F1-AT-RQJ	F1-GEN-BOMNJ	Refer to F1-AT-RQJ on page 225.
Approval In Progress	Enter	C1-UPLAPPENT	C1-UPLAPPENT	Refer to C1-UPLAPPENT on page 2024.
	Exit	C1-UPLAPPEXT	C1-UPLAPPEXT	Refer to C1-UPLAPPEXT on page 2024.
	Exit	F1-TODOCOMPL	F1-TODOCOMPL	Refer to F1-TODOCOMPL on page 1469.
Approved	Enter	C1-DEFERUPLD	C1-DEFERUPLD	Refer to C1-DEFERUPLD on page 2023.
	Monitor	F1-AT-RQJ	F1-GEN-BOMNJ	Refer to F1-AT-RQJ on page 225.
Rejected	-	-	-	-
Deferred Processing	Monitor	F1-AT-RQJ	F1-GEN-BOMNJ	Refer to F1-AT-RQJ on page 225.
Processing	Enter	C1-HLD-PROC	C1-HLD-PROC	Refer to C1-HLD-PROC on page 2039.
	Monitor	F1-AT-RQJ	F1-GEN-BOMNJ	Refer to F1-AT-RQJ on page 225.
Processed	-	-	-	-

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C1-HLD-DERIV

This algorithm reads the data in the BO_DATA_AREA column of the C1_UPL_REQUEST table and accordingly inserts the records in the C1_UPLOAD_REQ_DTLS table. In addition, the status of each record in the C1_UPLOAD_REQ_DTLS table is set to **Pending**.

It validates the following:

- Hold request type, hold request start date, hold request end date, hold reason, and hold entity are specified in the record.
- If the hold entity is **ACCT**, either the account ID or account identifier type and account identifier is specified in the record.
- If the hold entity is **PERS**, either the person ID or person identifier type and person identifier is specified in the record.
- If the hold entity is **BILL**, the bill ID is specified in the record.

If the hold entity is **ACCT** and the entity ID is not specified in the record, this algorithm derives the account ID using the respective account identifier type and account identifier combination. Similarly, if the hold entity is **PERS** and the entity ID is not specified in the record, it derives the person ID using the respective person identifier type and person identifier combination. Once the account ID or person ID is derived, the corresponding record is updated in the C1_UPLOAD_REQ_DTLS table. If the system could not derive the account ID using the account identifier type and account identifier combination or if the system could not derive the person ID using the person identifier type and person identifier combination, the status of the record in the C1_UPLOAD_REQ_DTLS table is changed to **Invalid**. In addition, if any of the above validations fail, the status of the record in the C1_UPLOAD_REQ_DTLS table is changed to **Invalid**.

This algorithm also derives the fields which can be used as search filters based on the mapping defined in the respective upload request type.

C1-DEFERVALD

This algorithm is invoked when the user clicks the **Validate** button. It checks whether the upload request must be validated in the real time (i.e., immediately) or in the deferred mode (i.e., in the background). If the total number of records in the upload request does not exceed the online record validate limit, it changes the status of the upload request to **Validated**. However, if the total number of records in the upload request exceeds the online record validate limit, it changes the status of the upload request to **Deferred Validation**.

It contains the following parameter:

- **Online Record Validate Limit** - Used to indicate the maximum number of records you can validate in the real time (i.e., immediately). This parameter is mandatory.

F1-AT-RQJ

This algorithm transitions the current status of the business object to the specified status. It contains the following parameters:

- **Next Status** – Used when you want to override the default next status specified in the lifecycle.
- **Next Transition Condition** – Used when you want to override the default next transition condition specified in the lifecycle.

At a time, you can specify value for either the **Next Status** or **Next Transition Condition** parameter. If you don't specify any value for these parameters, the system will transition the business object to the default next status specified in its lifecycle.

C1-HLD-VALID

This algorithm is invoked when the user clicks the **Validate** button. It validates the records which are in the **Pending** status. It validates the following:

- The hold request type given in the record is valid and active in the system.
- The hold reason is a valid and active value of the **HOLD_REASON_FLG** lookup field.

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- The hold entity is a valid and active value of the **HOLD_ENTITY_LVL_FLG** lookup field.
- The account ID given in the record is valid when the hold entity is **ACCT**.

> **Note:** If the account ID is invalid, it derives the account ID using the respective account identifier type and account identifier combination. Once the account ID is derived, the corresponding record is updated in the C1_UPLOAD_REQ_DTLS table. If the system could not derive the account ID using the account identifier type and account identifier combination, the status of the record in the C1_UPLOAD_REQ_DTLS table is changed to **Invalid**.

- The person ID given in the record is valid when the hold entity is **PERS**.

> **Note:** If the person ID is invalid, it derives the person ID using the respective person identifier type and person identifier combination. Once the person ID is derived, the corresponding record is updated in the C1_UPLOAD_REQ_DTLS table. If the system could not derive the person ID using the person identifier type and person identifier combination, the status of the record in the C1_UPLOAD_REQ_DTLS table is changed to **Invalid**.

- The bill ID given in the record is valid when the hold entity is **BILL**, and the outstanding amount of the bill is not equal to zero.
- The process's start and end dates are within the hold request start and end dates.
- The entity's start and end dates are within the hold request start and end dates.
- The entity's start and end dates should fall within at least one process's start and end dates.
- At least one process is kept on hold for the entity in the record.
- The value of each hold process in the record is set to either **Y** or **N**.
- The hold request start and end dates are set to either the system date or a future date.
- The start dates are not later than the end dates and the end dates are not earlier than the start dates.
- The same entity is not already kept on hold with the same hold reason through an existing draft or active hold request.
- The **Overdue**, **Auto Pay**, and **Refund** processes are not set to **Y** when the hold entity is set to **PERS**.
- The **Bill Generation**, **Overdue**, **Auto Pay**, **Refund**, and **Delinquency** processes are not set to **Y** when the hold entity is set to **BILL**.
- Both the **Overdue** and **Delinquency** processes are not set to **Y** at the same time in the record.

> **Note:** The **Overdue** process is valid for the financial services and health insurance domains, but the **Delinquency** process is valid only for the health insurance domain.

- The characteristic type given in the record is valid and its characteristic entity is set to **Hold Request**.
- The adhoc characteristic values are validated as per the validations defined in the respective algorithm.
- The predefined characteristic value is already defined for the characteristic type.
- The foreign key reference characteristic value is valid.
- The two or more records with the same entity ID do not exist in the upload request.

> **Note:** If duplicate records exist in the upload request, it validates and changes the status of one record to **Valid** and the status of the remaining records to **Invalid**.

If any of above validations fail, the status of the record in the C1_UPLOAD_REQ_DTLS table is changed to **Invalid**. However, if all the above validations are successful, the status of the record in the C1_UPLOAD_REQ_DTLS table is changed to **Valid**. Once all the pending records in the upload request are validated, the status of the upload request is changed to **Validated**.

> **Note:** If there are no pending records while validating an upload request, a message appears indicating that there are no records to be validated. In such case, you can only delete an upload request.

C1-UPLSUBENT

This algorithm is invoked when the user clicks the **Submit** button. It checks whether the approval is required for the upload request. If the approval is required for the upload request, the status of the upload request is changed to **Approval In Progress**. However, if the approval is not required for the upload request, the status of the upload request is changed to **Submitted**.

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C1-DEFERUPLD

This algorithm is invoked when the status of the upload request is changed to **Submitted** or **Approved**. It checks whether the upload request must be processed in the real time (i.e., immediately) or in the deferred mode (i.e., in the background). If the number of valid records in the upload request does not exceed the online record process limit, it changes the status of the upload request to **Processing**. However, if the number of valid records in the upload request exceeds the online record process limit, it changes the status of the upload request to **Deferred Processing**.

It contains the following parameter:

- **Online Record Process Limit** - Used to indicate the maximum number of valid records you can process in the real time (i.e., immediately). This parameter is mandatory.

C1-UPLAPPENT

This algorithm is invoked when the status of the upload request is changed to **Approval In Progress**. It creates a To Do using the approval To Do type that is specified in the respective upload request type. Once a To Do is created, it is assigned to all the users with the approval To Do role that is specified in the respective upload request type. In addition, it creates a log entry for the upload request when the To Do is created for the approver.

C1-UPLAPPEXT

This algorithm is invoked when the user clicks the **Approve** or **Reject** button. It checks whether the approver is associated with the approval To Do role specified in the respective upload request type. If not, it does not allow the approver to approve or reject the upload request. In addition, it does not allow the submitter to approve or reject the upload request.

F1-TODOCOMPL

This algorithm completes the To Do entries that are linked to an object when the object exits the given status. It finds and completes all open To Do entries where the business object's primary key is defined as a drill key. However, if the **Exclude To Do Entries From Auto Completion** (**F1-EXLTD**) characteristic is set to **Y** for a To Do type, the system does not automatically complete the respective To Do entry.

This algorithm contains the following parameter:

- **'Do Not Complete To Do Type' Char Type** – Used to specify the characteristic type that indicates whether the To Do entries should be automatically completed or not.

> **Note:** The **F1-EXLTD** characteristic type is shipped with the product. You can either use the **F1-EXLTD** characteristic type or a custom characteristic type, if required. Note that you must specify a predefined characteristic type where the characteristic entity is set to **To Do Type** and the predefined values are set to **Y** or **N**.

C1-HLD-PROC

This algorithm is invoked when the status of the upload request is changed to **Processing**. It fetches a list of records which are in the **Valid** status. For each valid record with a unique combination of the hold request type, hold request start date, hold request end date, hold reason, hold entity, hold entity start date, hold entity end date, comments, hold process details, and hold characteristic details, it creates one hold request using the entity business object specified in the upload request type. However, if there are multiple entity IDs with the same combination, it adds all the entities in the same hold request.

> **Note:** The system creates the hold request using the entity business object specified in the respective upload request type.

If the **Activation Approval** option is selected in the respective hold request type, the status of the hold request is set to **Activation Approval In Progress**. However, if the **Activation Approval** option is not selected in the respective hold request type, the system checks the number of entities added in the hold request. If the number of entities added in the hold request does not exceed the defer processing count, the status of the hold request is set to **Active**. However, if the number of entities added in the hold request exceeds the defer processing count, the status of the hold request is set to **Deferred Processing**.

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If the record is successfully processed, the status of the record is changed to **Processed**. However, if the record could not be processed successfully due to any reason, the status of the record is changed to **Error**. Finally, the status of the upload request is changed to **Processed**.

Mass Hold Request Creation CSV Format

The following table lists and describes the columns that should be available in the CSV file while creating mass hold requests through an upload request:

Sr. No.	Column Name	Description	Mandatory (Yes or No)
1	Hold Request Type	Used to specify the hold request type using which you want to create the hold request. **Note:** You must specify a hold request type which is already defined in the system. It should be in the **Active** status.	Yes
2	Start Date	Used to specify the date from when the hold request is effective. **Note:** You must specify the date in the **YYYY-MM-DD** format. The hold request start date should be set to the system date or a future date. It cannot be a past date. The hold request start date cannot be later than the hold request end date.	Yes
3	End Date	Used to specify the date till when the hold request is effective. **Note:** You must specify the date in the **YYYY-MM-DD** format. The hold request end date should be set to the system date or a future date. It cannot be a past date. The hold request end date cannot be earlier than the hold request start date.	Yes
4	Hold Reason	Used to indicate the reason why you want to hold the entity. **Note:** You must specify a value which is already defined in the **HOLD_REASON_FLG** lookup field. It should be in the **Active** status.	Yes

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Sr. No.	Column Name	Description	Mandatory (Yes or No)
5	Hold Entity	Used to indicate the type of the entity for which you want to create the hold request. The valid values are: • ACCT • BILL • PERS **Note:** You must specify a value which is already defined in the **HOLD_ENTITY_LVL_FLG** lookup field. It should be in the **Active** status.	Yes
6	Account Identifier Type	Used to specify the account identifier type. **Note:** You must specify an account identifier type which is already defined in the system.	Yes (Conditional) **Note:** This data is required when the hold entity is set to **ACCT** and the hold entity ID is not specified in the record.
7	Account Identifier	Used to specify the account identifier. The system will derive the account using the given account identifier type and account identifier combination and then create a hold request for the respective account.	Yes (Conditional) **Note:** This data is required when the hold entity is set to **ACCT** and the hold entity ID is not specified in the record.
8	Person Identifier Type	Used to specify the person identifier type. **Note:** You must specify a person identifier type which is already defined in the system.	Yes (Conditional) **Note:** This data is required when the hold entity is set to **PERS** and the hold entity ID is not specified in the record.
9	Person Identifier	Used to specify the person identifier. The system will derive the person using the given person identifier type and person identifier combination and then create a hold request for the respective person.	Yes (Conditional) **Note:** This data is required when the hold entity is set to **PERS** and the hold entity ID is not specified in the record.
10	Hold Entity ID	Used to indicate the entity (such as, person, account, or bill) that you want to keep on hold.	Yes (Conditional)

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Sr. No.	Column Name	Description	Mandatory (Yes or No)
		Note: If the hold entity is set to **ACCT**, you must specify the account ID in this column. If the hold entity is set to **PERS**, you must specify the person ID in this column. And, if the hold entity is set to **BILL**, you must specify the bill ID in this column. If you do not specify the account ID, the system derives the account ID using the account identifier type and account identifier combination. Similarly, if you do not specify the person ID, the system derives the person ID using the person identifier type and person identifier combination.	**Note:** This data is required when the hold entity is set to **BILL**.
11	Comments	Used to specify additional information about the hold request.	No
12	Hold Entity Start Date	Used to specify the date from when you want to hold the entity. **Note:** You must specify the date in the **YYYY-MM-DD** format. The hold entity start date must be between the hold request start and end dates and between at least one process's start and end dates. The hold entity start date cannot be later than the hold entity end date.	Yes
13	Hold Entity End Date	Used to specify the date till when you want to hold the entity. **Note:** You must specify the date in the **YYYY-MM-DD** format. The hold entity end date must be between hold request start and end dates and between the process's start and end dates. The hold entity end date cannot be earlier than the hold entity start date.	No
14	Include Hierarchy	Used to indicate whether all the accounts in the person’s hierarchy or only the persons’ immediate accounts should be kept on hold. The valid values are: • **Y** - Used when you want to keep all the accounts in the person’s hierarchy on hold through the hold request.	No

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Sr. No.	Column Name	Description	Mandatory (Yes or No)
		• **N** - Used when you want to keep only the persons' immediate accounts on hold through the hold request. **Note:** The system considers only the child persons and not the grand child persons from the person's hierarchy and then derives the accounts where the child person is the main customer. This column is applicable only when the hold entity is set to **PERS**. If you do not specify the value, by default, it is set to **N**.	
15	Hold Funding	Used to indicate whether you want to hold the funding process for the entity. The valid values are: • Y • N **Note:** You can hold the funding process when the hold entity is set to **ACCT**, **PERS**, or **BILL**. If you do not specify the value, by default, it is set to **N**.	No
16	Hold Funding Start Date	Used to specify the date from when you want to hold the funding process for the entity. **Note:** You must specify the date in the **YYYY-MM-DD** format. The hold funding start date must be between the hold request start and end dates. The hold funding start date cannot be later than the hold funding end date.	Yes (Conditional) **Note:** This data is required when the hold funding is set to **Y** in the record.
17	Hold Funding End Date	Used to specify the date till when you want to hold the funding process for the entity.	No

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Sr. No.	Column Name	Description	Mandatory (Yes or No)
		Note: You must specify the date in the **YYYY-MM-DD** format. The hold funding end date must be between the hold request start and end dates. The hold funding end date cannot be earlier than the hold funding start date.	
18	Hold Overdue	Used to indicate whether you want to hold the overdue process for the entity. The valid values are: • Y • N **Note:** You can hold the overdue process when the hold entity is set to **ACCT**. Note that you cannot set both hold overdue and hold delinquency to **Y** for an account in the same duration. The **Overdue** process is valid for the financial services and health insurance domains but the **Delinquency** process is valid only for the health insurance domain. If you do not specify the value, by default, it is set to **N**.	No
19	Hold Overdue Start Date	Used to specify the date from when you want to hold the overdue process for the entity. **Note:** You must specify the date in the **YYYY-MM-DD** format. The hold overdue start date must be between the hold request start and end dates. The hold overdue start date cannot be later than the hold overdue end date.	Yes (Conditional) **Note:** This data is required when the hold overdue is set to **Y** in the record.
20	Hold Overdue End Date	Used to specify the date till when you want to hold the overdue process for the entity.	No

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Sr. No.	Column Name	Description	Mandatory (Yes or No)
		Note: You must specify the date in the **YYYY-MM-DD** format. The hold overdue end date must be between the hold request start and end dates. The hold overdue end date cannot be earlier than the hold overdue start date.	
21	Hold Bill Generation	Used to indicate whether you want to hold the bill generation process for the entity. The valid values are: • Y • N **Note:** You can hold the bill generation process when the hold entity is set to **ACCT** or **PERS**. If you do not specify the value, by default, it is set to **N**.	No
22	Hold Bill Generation Start Date	Used to specify the date from when you want to hold the bill generation process for the entity. **Note:** You must specify the date in the **YYYY-MM-DD** format. The hold bill generation start date must be between the hold request start and end dates. The hold bill generation start date cannot be later than the hold bill generation end date.	Yes (Conditional) **Note:** This data is required when the hold bill generation is set to **Y** in the record.
23	Hold Bill Generation End Date	Used to specify the date till when you want to hold the bill generation process for the entity. **Note:** You must specify the date in the **YYYY-MM-DD** format. The hold bill generation end date must be between the hold request start and end dates. The hold bill generation end date cannot be earlier than the hold bill generation start date.	No
24	Hold Auto Pay	Used to indicate whether you want to hold the automatic payment process for the entity. The valid values are:	No

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Sr. No.	Column Name	Description	Mandatory (Yes or No)
		• Y • N **Note:** You can hold the automatic payment process when the hold entity is set to **ACCT**. If you do not specify the value, by default, it is set to **N**.	
25	Hold Auto Pay Start Date	Used to specify the date from when you want to hold the automatic payment process for the entity. **Note:** You must specify the date in the **YYYY-MM-DD** format. The hold auto pay start date must be between the hold request start and end dates. The hold auto pay start date cannot be later than the hold auto pay end date.	Yes (Conditional) **Note:** This data is required when the hold auto pay is set to **Y** in the record.
26	Hold Auto Pay End Date	Used to specify the date till when you want to hold the automatic payment process for the entity. **Note:** You must specify the date in the **YYYY-MM-DD** format. The hold auto pay end date must be between the hold request start and end dates. The hold auto pay end date cannot be earlier than the hold auto pay start date.	No
27	Hold Refund	Used to indicate whether you want to hold the refund process for the entity. The valid values are: • Y • N **Note:** You can hold the refund process when the hold entity is set to **ACCT**. If you do not specify the value, by default, it is set to **N**.	No
28	Hold Refund Start Date	Used to specify the date from when you want to hold the refund process for the entity.	Yes (Conditional)

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Sr. No.	Column Name	Description	Mandatory (Yes or No)
		Note: You must specify the date in the **YYYY-MM-DD** format. The hold refund start date must be between the hold request start and end dates. The hold refund start date cannot be later than the hold refund end date.	**Note:** This data is required when the hold refund is set to **Y** in the record.
29	Hold Refund End Date	Used to specify the date till when you want to hold the refund process for the entity. **Note:** You must specify the date in the **YYYY-MM-DD** format. The hold refund end date must be between the hold request start and end dates. The hold refund end date cannot be earlier than the hold refund start date.	No
30	Hold Delinquency	Used to indicate whether you want to hold the delinquency process for the entity. The valid values are: • Y • N **Note:** You can hold the delinquency process when the hold entity is set to **PERS** or **ACCT**. Note that you cannot set both hold overdue and hold delinquency to **Y** for an account in the same duration. The **Overdue** process is valid for the financial services and health insurance domains but the **Delinquency** process is valid only for the health insurance domain. If you do not specify the value, by default, it is set to **N**.	No
31	Hold Delinquency Start Date	Used to specify the date from when you want to hold the delinquency process for the entity.	Yes (Conditional)

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Sr. No.	Column Name	Description	Mandatory (Yes or No)
		Note: You must specify the date in the **YYYY-MM-DD** format. The hold delinquency start date must be between the hold request start and end dates. The hold delinquency start date cannot be later than the hold delinquency end date.	**Note:** This data is required when the hold delinquency is set to **Y** in the record.
32	Hold Delinquency End Date	Used to specify the date till when you want to hold the delinquency process for the entity. **Note:** You must specify the date in the **YYYY-MM-DD** format. The hold delinquency end date must be between the hold request start and end dates. The hold delinquency end date cannot be earlier than the hold delinquency start date.	No
33	Effective Date1, Effective Date2, ..., Effective Date5	Used to specify the date from when the characteristic is effective for the hold request. **Note:** You must specify the date in the **YYYY-MM-DD** format.	Yes (Conditional) **Note:** This data is required when the characteristic type is specified in the record.
34	Char Type1, Char Type2, ..., Char Type5	Used to specify the characteristic type. **Note:** You must specify a characteristic type where the characteristic entity is set to **Hold Request**. You can specify maximum 5 characteristics in the record.	No
35	Char Val1, Char Val2, ..., Char Val5	Used to specify the value for the characteristic type.	Yes (Conditional) **Note:** This data is required when the characteristic type is specified in the record.

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Note:

The CSV file should contain the columns in the above mentioned sequence. You can add five sets of characteristics — each set containing Effective Date, Char Type, and Char Val followed by the subsequent set (i.e., Effective Date1, Char Type1, Char Val1, Effective Date2, Char Type2, Char Val2, Effective Date3, Char Type3, Char Val3, Effective Date4, Char Type4, Char Val4, Effective Date5, Char Type5, Char Val5).

Before uploading the file, ensure that the column headers specified in the CSV file are mapped to the schema of the respective upload request business object through data mapping in the upload request type. Otherwise, erroneous results might occur. For more information, see Mapping Data and Configuring Filters for an Upload Request Type on page 1433.

Sample Mass Hold Request Creation CSV File

```
Hold Request Type,Start Date,End Date,Hold Reason,Hold Entity,Account Identifier Type,Account Identifier,Person Identifier Type
Entity ID,Comments,Hold Entity Start Date,Hold Entity End Date,Include Hierarchy,Hold Funding,Hold Funding Start Date,Hold Fund
Overdue,Hold Overdue Start Date,Hold Overdue End Date,Hold Bill Generation,Hold Bill Generation Start Date,Hold Bill Generation
Pay,Hold Auto Pay Start Date,Hold Auto Pay End Date,Hold Refund,Hold Refund Start Date,Hold Refund End Date,Hold Delinquency,Ho
Date,Hold Delinquency End Date,Effective Date1,Char Type1,Char Val1,Effective Date2,Char Type2,Char Val2,Effective Date3,Char T
Date4,Char Type4,Char Val4,Effective Date5,Char Type5,Char Val5
HOLD_WITHOUT_APPROVAL,2025-07-17,2025-11-30,CMDP,ACCT,,,,,3796311674,Hold Due To
Dispute,2025-07-17,2025-11-30,,N,,,N,,,Y,2025-07-17,2025-11-30,Y,2025-08-17,2025-10-30,Y,2025-08-17,2025-10-30,Y,2025-08-17,202
Smith,,,,,,,,,,,,
HOLD_WITH_APPROVAL,2025-07-20,2025-11-30,CMDR,ACCT,,,,,9407850112,Hold Due To Disaster
Recovery,2025-07-20,2025-11-30,,N,,,N,,,Y,2025-07-20,2025-11-30,Y,2025-07-20,2025-11-30,Y,2025-07-20,2025-11-30,Y,2025-07-20,20
Jones,,,,,,,,,,,,
HOLD_WITHOUT_APPROVAL,2025-07-17,2025-11-30,CMDP,ACCT,IBAN,XX 80 WEST 123456 98765432,,,,Hold Due To
Dispute,2025-07-17,2025-11-30,,N,,,N,,,Y,2025-07-17,2025-11-30,Y,2025-08-17,2025-10-30,Y,2025-08-17,2025-10-30,Y,2025-08-17,202
Eccelstone,,,,,,,,,,,,
HOLD_WITH_APPROVAL,2025-07-25,2025-11-30,CMDR,ACCT,IBAN,XX 80 WEST 123456 99885432,,,,Hold Due To Disaster
Recovery,2025-07-25,2025-11-30,,N,,,N,,,Y,2025-07-25,2025-11-30,Y,2025-07-25,2025-11-30,Y,2025-07-25,2025-11-30,Y,2025-07-25,20
Charles,,,,,,,,,,,,
HOLD_WITH_APPROVAL,2025-07-17,2025-11-30,CMDP,BILL,,,,,1857896583,Hold Due To Disaster Recovery,2025-07-17,,,Y,2025-07-17,,N,,
Jones,,,,,,,,,,,,
HOLD_WITH_APPROVAL,2025-07-10,2025-11-30,CMDP,PERS,,,,,1858896583,Hold Due To Disaster
Recovery,2025-07-10,,Y,Y,2025-07-10,,N,,,N,,,N,,,N,,,,HDIN,Peter Jones,,,,,,,,,,,
```

Mass Refund Request Creation

Oracle Revenue Management and Billing provides the ability to create multiple refund requests at once through the **Upload Request** feature. The system allows you to refund a credit bill, a credit bill line item (i.e., a bill segment or an adjustment), a specific payment, all the payments of a payment event, and/or a credit adjustment of an account through a refund request. The **C1-RefundUploadRequest** business object enables you to create an upload request for mass refund request creation.

Note: At present, you can only create new refund requests and not update existing refund requests through the **Upload Request** feature.

You need to create an upload request type for the **C1-RefundUploadRequest** business object. You can then upload a mass refund request creation file in the CSV format using the respective upload request type. The mass refund request creation file should contain records with the following information – refund request type, account details, entity type, entity ID, refund adjustment type, refund amount, comments, and refund characteristics. For more information, see Mass Refund Request Creation CSV Format.

Note: You can specify maximum 5 characteristics in the record.

On uploading a mass refund request creation file, the system creates an upload request in the **Draft** status. The data records are created in the **Pending** status. The system validates the following for each record:

- Either the account ID or account identifier type and account identifier is specified in the record.
- Refund request type, entity type, entity ID and refund amount are specified in the record.
- If the entity type is **Adjustment**, then the adjustment ID given in the record is valid.

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- If the entity type is **Bill**, then the bill ID given in the record is valid.
- If the entity type is **Bill Segment**, then the bill segment ID given in the record is valid.
- If the entity type is **Payment Event**, then the payment event ID given in the record is valid.
- If the entity type is **Payment**, then the payment ID given in the record is valid.

Based on the entity type and entity ID, the system derives the original amount and currency of the respective entity. If the adjustment type is not specified in the record, the system derives the adjustment type from the respective refund request type. Similarly, if the account ID is not specified in the record, the system derives the account ID using the respective account identifier type and account identifier combination.

If the system could not derive the adjustment type, or account ID using the account identifier type and account identifier combination, the status of the record is changed to **Invalid**. In addition, if any of the above validations fail, the status of the record is changed to **Invalid**.

Note:

If the mandatory data is missing in any record of the file, the system will not allow you to create an upload request.

The system does not allow you to upload a file which exceeds 700 KB. Therefore, you must ensure that the file size is within the maximum limit.

On clicking the **Validate** button, the system checks whether the upload request must be validated in the real time (i.e., immediately) or in the deferred mode (i.e., in the background). If the total number of records in the upload request does not exceed the online record validate limit, the system validates the following in the real time:

- The account ID given in the record is valid.
- The entity type is a valid and active value of the **REF_WO_ENTITY_FLG** lookup field.
- The entity type given in the record for the entity ID is correct.
- The entity (i.e., adjustment, bill, bill segment, payment event, or payment) exists for the respective account in the system.
- The payment ID given in the record is in the **Frozen** status and is matched against the suspense or excess credit contract.
- The bill ID given in the record is in the **Complete** status.
- The bill segment ID given in the record is in the **Frozen** status.
- The adjustment ID given in the record is in the **Freezable** or **Frozen** status.
- The refund request type given in the record is valid and in the **Active** status. Its action flag is set to **Refund**.
- The refund amount is greater than zero.
- The refund amount is not greater than the eligible refund amount and the eligible refund amount is not equal to zero.
- The adjustment type given in the record is valid and its **A/P Request Type Code** flag is set to **Refund**.
- One record with a bill (for example, B01) and another record with the bill segment (for example, BS01) or adjustment (for example, AD01) of the same bill (i.e., B01) are not present in the upload request.
- One record with a payment event (for example, PE01) and another record with the payment (for example, PY01) of the same payment event (i.e., PE01) are not present in the upload request.
- The amount matches the decimal positions of the respective currency.
- The entity is not already included in any refund request that is in the non-final status.
- The characteristic type given in the record is valid and its characteristic entity is set to **Refund/Write Off Request**.
- The adhoc characteristic values are validated as per the validations defined in the respective algorithm.
- The predefined characteristic value is already defined for the characteristic type.
- The foreign key reference characteristic value is valid.
- The two or more records with the same entity type and entity ID combination do not exist in the upload request.

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Note:

If the account ID is invalid, the system derives the account ID using the respective account identifier type and account identifier combination. If the system could not derive the account ID using the account identifier type and account identifier combination, the status of the record is changed to **Invalid**.

If duplicate records exist in the upload request, the system validates and changes the status of one record to **Valid** and the status of the remaining records to **Invalid**.

If any of above validations fail, the status of the record is changed to **Invalid**. However, if all the above validations are successful, the status of the record is changed to **Valid**. Once all the pending records in the upload request are validated, the status of the upload request is changed to **Validated**.

However, if the total number of records in the upload request exceeds the online record validate limit, the system changes the status of the upload request to **Deferred Validation**. The system then validates the records and changes the status of the upload request from **Deferred Validation** to **Validated** when the **C1-UPLRQ** batch is executed.

On clicking the **Submit** button, the system checks whether the approval is required for the upload request. If the approval is required for the upload request, the status of the upload request is changed to **Approval In Progress**. However, if the approval is not required for the upload request, the status of the upload request is changed to **Submitted**.

The approver can either approve or reject the upload request based on the observations. On approving an upload request, the status of the upload request is changed to **Approved**. However, on rejecting an upload request, the status of the upload request is changed to **Rejected**.

Once the status of the upload request is changed to **Submitted** or **Approved**, the system checks whether the upload request must be processed in the real time (i.e., immediately) or in the deferred mode (i.e., in the background). If the number of valid records in the upload request does not exceed the online record process limit, the system changes the status of the upload request to **Processing**. However, if the number of valid records in the upload request exceeds the online record process limit, the system changes the status of the upload request to **Deferred Processing**. The system then changes the status of the upload request from **Deferred Processing** to **Processing** when the **C1-UPLRQ** batch is executed.

Once the status of the upload request is changed to **Processing**, the system fetches a list of records which are in the **Valid** status. For each valid record with a unique combination of the refund request type and account ID, the system creates a refund request for the account. However, if there are multiple entity IDs with the same combination, it adds all the entities in the same refund request.

If the **Approval Required** option is selected in the respective refund request type, the status of the refund request is set to **Approval In Progress**. However, if the **Approval Required** option is not selected in the respective refund request type, the system checks the number of entities added in the refund request. If the number of entities added in the refund request does not exceed the online record process limit, the system creates the refund adjustments using the refund adjustment type and then changes the status of the refund request to **Processed**. However, if the number of entities added in the refund request exceeds the online record process limit, the status of the refund request is set to **Deferred Processing**.

Once the refund request is successfully created, the status of the record is changed to **Processed**. However, if any error occurs while creating the refund request, the status of the record is changed to **Error**. Finally, the status of the upload request is changed to **Processed**.

Note:

The system creates the refund request using the entity business object specified in the respective upload request type.

This feature is tested and certified for both the financial services and health insurance domains.

Prerequisites

To setup the mass refund request creation feature, you need to do the following:

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- Define the required upload request type where the upload request business object is set to **C1-RefundUploadRequest**.
- Assign the **C1-REFUR** To Do type to a To Do role whose users must receive a To Do while submitting a refund request creation upload request for approval.
- Define the required characteristic types where the characteristic entity is set to **Upload Request Type**.
- Define the required characteristic types where the characteristic entity is set to **Upload Request**.
- Define the required foreign key reference for refund request (if not available) in the system.
- Define the status reasons for the **Canceled** and **Rejected** statuses of the **C1-RefundUploadRequest** business object in the **Status Reason** screen.
- Define the required refund request types where the **Action** flag is set to **Refund**.
- Define the required account identifier types in the system.
- Define the required adjustment types where the **A/P Request Type Code** flag is set to **Refund**.
- Define the required characteristic types where the characteristic entity is set to **Refund/Write Off Request**.
- Set the batch control type of the **Upload Request Periodic Monitor (C1-UPLRQ)** batch to **Timed** and define the following attributes:
  - Time Interval
  - Timer Active
  - User ID
  - Batch Language
  - Email Address

  For more information about this batch, see *Oracle Revenue Management and Billing Batch Guide*.

Algorithms Used in C1-RefundUploadRequest

The following table lists the algorithms which are used in the lifecycle of the **C1-RefundUploadRequest** business object:

Status	System Event	Algorithm	Algorithm Type	Description
Draft	Enter	C1-RF-DERIV	C1-RF-DERIV	Refer to C1-RF-DERIV on page 2053.
Validating	Enter	C1-DEFERVALD	C1-DEFERVALD	Refer to C1-DEFERVALD on page 2037.
Deferred Validation	Monitor	F1-AT-RQJ	F1-GEN-BOMNJ	Refer to F1-AT-RQJ on page 225.
Validated	Enter	C1-RF-VALID	C1-RF-VALID	Refer to C1-RF-VALID on page 2054.
Canceled	-	-	-	-
Submitted	Enter	C1-UPLSUBENT	C1-UPLSUBENT	Refer to C1-UPLSUBENT on page 2023.
	Enter	C1-DEFERUPLD	C1-DEFERUPLD	Refer to C1-DEFERUPLD on page 2023.
	Monitor	F1-AT-RQJ	F1-GEN-BOMNJ	Refer to F1-AT-RQJ on page 225.
Approval In Progress	Enter	C1-UPLAPPENT	C1-UPLAPPENT	Refer to C1-UPLAPPENT on page 2024.
	Exit	C1-UPLAPPEXT	C1-UPLAPPEXT	Refer to C1-UPLAPPEXT on page 2024.

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Status	System Event	Algorithm	Algorithm Type	Description
	Exit	F1-TODOCOMPL	F1-TODOCOMPL	Refer to F1-TODOCOMPL on page 1469.
Approved	Enter	C1-DEFERUPLD	C1-DEFERUPLD	Refer to C1-DEFERUPLD on page 2023.
	Monitor	F1-AT-RQJ	F1-GEN-BOMNJ	Refer to F1-AT-RQJ on page 225.
Rejected	-	-	-	-
Deferred Processing	Monitor	F1-AT-RQJ	F1-GEN-BOMNJ	Refer to F1-AT-RQJ on page 225.
Processing	Enter	C1-RF-PROC	C1-RF-PROC	Refer to C1-RF-PROC on page 2056.
	Monitor	F1-AT-RQJ	F1-GEN-BOMNJ	Refer to F1-AT-RQJ on page 225.
Processed	-	-	-	-

C1-RF-DERIV

This algorithm reads the data in the BO_DATA_AREA column of the C1_UPL_REQUEST table and accordingly inserts the records in the C1_UPLOAD_REQ_DTLS table. In addition, the status of each record in the C1_UPLOAD_REQ_DTLS table is set to **Pending**.

It validates the following:

- Either the account ID or account identifier type and account identifier is specified in the record.
- Refund request type, entity type, entity ID and refund amount are specified in the record.
- If the entity type is **Adjustment**, then the adjustment ID given in the record is valid.
- If the entity type is **Bill**, then the bill ID given in the record is valid.
- If the entity type is **Bill Segment**, then the bill segment ID given in the record is valid.
- If the entity type is **Payment Event**, then the payment event ID given in the record is valid.
- If the entity type is **Payment**, then the payment ID given in the record is valid.

Based on the entity type and entity ID, this algorithm derives the original amount and currency of the respective entity from the system. If the adjustment type is not specified in the record, this algorithm derives the adjustment type from the respective refund request type. Similarly, if the account ID is not specified in the record, it derives the account ID using the respective account identifier type and account identifier combination.

Once the adjustment type and/or account ID is derived, the corresponding record is updated in the C1_UPLOAD_REQ_DTLS table. If the system could not derive the adjustment type, or account ID using the account identifier type and account identifier combination, the status of the record in the C1_UPLOAD_REQ_DTLS table is changed to **Invalid**. In addition, if any of the above validations fail, the status of the record in the C1_UPLOAD_REQ_DTLS table is changed to **Invalid**.

This algorithm also derives the fields which can be used as search filters based on the mapping defined in the respective upload request type.

C1-DEFERVALD

This algorithm is invoked when the user clicks the **Validate** button. It checks whether the upload request must be validated in the real time (i.e., immediately) or in the deferred mode (i.e., in the background). If the total number of records in the upload request does not exceed the online record validate limit, it changes the status of the upload request to **Validated**. However, if the total number of records in the upload request exceeds the online record validate limit, it changes the status of the upload request to **Deferred Validation**.

It contains the following parameter:

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- **Online Record Validate Limit** - Used to indicate the maximum number of records you can validate in the real time (i.e., immediately). This parameter is mandatory.

F1-AT-RQJ

This algorithm transitions the current status of the business object to the specified status. It contains the following parameters:

- **Next Status** – Used when you want to override the default next status specified in the lifecycle.
- **Next Transition Condition** – Used when you want to override the default next transition condition specified in the lifecycle.

At a time, you can specify value for either the **Next Status** or **Next Transition Condition** parameter. If you don't specify any value for these parameters, the system will transition the business object to the default next status specified in its lifecycle.

C1-RF-VALID

This algorithm is invoked when the user clicks the **Validate** button. It validates the records which are in the **Pending** status. It validates the following:

- The account ID given in the record is valid.

> **Note:** If the account ID is invalid, it derives the account ID using the respective account identifier type and account identifier combination. Once the account ID is derived, the corresponding record is updated in the C1_UPLOAD_REQ_DTLS table. If the system could not derive the account ID using the account identifier type and account identifier combination, the status of the record in the C1_UPLOAD_REQ_DTLS table is changed to **Invalid**.

- The entity type is a valid and active value of the **REF_WO_ENTITY_FLG** lookup field.
- The entity type given in the record for the entity ID is correct.
- The entity (i.e., adjustment, bill, bill segment, payment event, or payment) exists for the respective account in the system.
- The payment ID given in the record is in the **Frozen** status and is matched against the suspense or excess credit contract.
- The bill ID given in the record is in the **Complete** status.
- The bill segment ID given in the record is in the **Frozen** status.
- The adjustment ID given in the record is in the **Freezable** or **Frozen** status.
- The refund request type given in the record is valid and in the **Active** status. Its action flag is set to **Refund**.
- The refund amount is greater than zero.
- The refund amount is not greater than the eligible refund amount and the eligible refund amount is not equal to zero.
- The adjustment type given in the record is valid and its **A/P Request Type Code** flag is set to **Refund**.
- One record with a bill (for example, B01) and another record with the bill segment (for example, BS01) or adjustment (for example, AD01) of the same bill (i.e., B01) are not present in the upload request.
- One record with a payment event (for example, PE01) and another record with the payment (for example, PY01) of the same payment event (i.e., PE01) are not present in the upload request.
- The amount matches the decimal positions of the respective currency.
- The entity is not already included in any refund request that is in the non-final status.
- The characteristic type given in the record is valid and its characteristic entity is set to **Refund/Write Off Request**.
- The adhoc characteristic values are validated as per the validations defined in the respective algorithm.
- The predefined characteristic value is already defined for the characteristic type.
- The foreign key reference characteristic value is valid.
- The two or more records with the same entity type and entity ID combination do not exist in the upload request.

> **Note:** If duplicate records exist in the upload request, it validates and changes the status of one record to **Valid** and the status of the remaining records to **Invalid**.

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If any of above validations fail, the status of the record in the C1_UPLOAD_REQ_DTLS table is changed to **Invalid**. However, if all the above validations are successful, the status of the record in the C1_UPLOAD_REQ_DTLS table is changed to **Valid**. Once all the pending records in the upload request are validated, the status of the upload request is changed to **Validated**.

Note: If there are no pending records while validating an upload request, a message appears indicating that there are no records to be validated. In such case, you can only delete an upload request.

C1-UPLSUBENT

This algorithm is invoked when the user clicks the **Submit** button. It checks whether the approval is required for the upload request. If the approval is required for the upload request, the status of the upload request is changed to **Approval In Progress**. However, if the approval is not required for the upload request, the status of the upload request is changed to **Submitted**.

C1-DEFERUPLD

This algorithm is invoked when the status of the upload request is changed to **Submitted** or **Approved**. It checks whether the upload request must be processed in the real time (i.e., immediately) or in the deferred mode (i.e., in the background). If the number of valid records in the upload request does not exceed the online record process limit, it changes the status of the upload request to **Processing**. However, if the number of valid records in the upload request exceeds the online record process limit, it changes the status of the upload request to **Deferred Processing**.

It contains the following parameter:

- **Online Record Process Limit** - Used to indicate the maximum number of valid records you can process in the real time (i.e., immediately). This parameter is mandatory.

C1-UPLAPPENT

This algorithm is invoked when the status of the upload request is changed to **Approval In Progress**. It creates a To Do using the approval To Do type that is specified in the respective upload request type. Once a To Do is created, it is assigned to all the users with the approval To Do role that is specified in the respective upload request type. In addition, it creates a log entry for the upload request when the To Do is created for the approver.

C1-UPLAPPEXT

This algorithm is invoked when the user clicks the **Approve** or **Reject** button. It checks whether the approver is associated with the approval To Do role specified in the respective upload request type. If not, it does not allow the approver to approve or reject the upload request. In addition, it does not allow the submitter to approve or reject the upload request.

F1-TODOCOMPL

This algorithm completes the To Do entries that are linked to an object when the object exits the given status. It finds and completes all open To Do entries where the business object's primary key is defined as a drill key. However, if the **Exclude To Do Entries From Auto Completion** (**F1-EXLTD**) characteristic is set to **Y** for a To Do type, the system does not automatically complete the respective To Do entry.

This algorithm contains the following parameter:

- **'Do Not Complete To Do Type' Char Type** – Used to specify the characteristic type that indicates whether the To Do entries should be automatically completed or not.

Note: The **F1-EXLTD** characteristic type is shipped with the product. You can either use the **F1-EXLTD** characteristic type or a custom characteristic type, if required. Note that you must specify a predefined characteristic type where the characteristic entity is set to **To Do Type** and the predefined values are set to **Y** or **N**.

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C1-RF-PROC

This algorithm is invoked when the status of the upload request is changed to **Processing**. It fetches a list of records which are in the **Valid** status. For each valid record with a unique combination of the refund request type and account ID, this algorithm creates a refund request for the account. However, if there are multiple entity IDs with the same combination, it adds all the entities in the same refund request.

Note: The system creates the refund request using the entity business object specified in the respective upload request type.

If the **Approval Required** option is selected in the respective refund request type, the status of the refund request is set to **Approval In Progress**. However, if the **Approval Required** option is not selected in the respective refund request type, the system checks the number of entities added in the refund request. If the number of entities added in the refund request does not exceed the online record process limit, the system creates the refund adjustments using the refund adjustment type and then changes the status of the refund request to **Processed**. However, if the number of entities added in the refund request exceeds the online record process limit, the status of the refund request is set to **Deferred Processing**.

If the record is successfully processed, the status of the record is changed to **Processed**. However, if the record could not be processed successfully due to any reason, the status of the record is changed to **Error**. Finally, the status of the upload request is changed to **Processed**.

Mass Refund Request Creation CSV Format

The following table lists and describes the columns that should be available in the CSV file while creating multiple refund requests at once through an upload request:

Sr. No.	Column Name	Description	Mandatory (Yes or No)
1	Refund Request Type	Used to specify the refund request type using which you want to create the refund request. **Note:** You must specify a refund request type which is already defined in the system. It should be in the **Active** status.	Yes
2	Account Identifier Type	Used to specify the account identifier type. **Note:** You must specify an account identifier type which is already defined in the system.	Yes (Conditional) **Note:** This data is required when the account ID is not specified in the record.
3	Account Identifier	Used to specify the account identifier. **Note:** The system derives the account using the given account identifier type and account identifier combination when the account ID is either not specified or is invalid in the record.	Yes (Conditional) **Note:** This data is required when the account ID is not specified in the record.
4	Account ID	Used to indicate the account for which you want to create the refund request.	Yes (Conditional) **Note:** This data is required when the account identifier type and account identifier are not specified in the record.

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Sr. No.	Column Name	Description	Mandatory (Yes or No)
5	Entity Type	Used to specify the entity type. The valid values are: • **Adjustment** - Used when you want to refund a credit adjustment of an account through a refund request. • **Bill** - Used when you want to refund a credit bill of an account through a refund request. • **Bill Segment** - Used when you want to refund a credit bill segment of an account through a refund request. • **Payment Event** - Used when you want to refund all the payments of a payment event created for a payor account through a refund request. • **Payment** - Used when you want to refund a specific payment of an account through a refund request. **Note:** You must specify a value which is already defined in the **REF_WO_ENTITY_FLG** lookup field. It should be in the **Active** status.	Yes
6	Entity ID	Used to specify the entity ID. **Note:** Here, you can specify the adjustment ID, bill ID, bill segment ID, payment event ID, or payment ID depending on the specified entity type. The specified payment should be in the **Frozen** status and matched against the suspense or excess credit contract. The specified bill should be in the **Complete** status. The specified bill segment should be in the **Frozen** status. The specified adjustment should be in the **Freezable** or **Frozen** status.	Yes
7	Adjustment Type	Used to specify the adjustment type using which you want to create the refund adjustment for the entity.	No

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Sr. No.	Column Name	Description	Mandatory (Yes or No)
		Note: You must specify an adjustment type which is already defined in the system. Its **A/P Request Type Code** flag should be set to **Refund**. If you do not specify the adjustment type, the system considers the refund adjustment type specified in the respective refund request type.	
8	Refund Amount	Used to specify the amount that you want to refund. **Note:** You must specify a number greater than zero but less than or equal to the eligible refund amount. You must specify a number with decimal positions less than or equal to the decimal positions defined for the respective currency.	Yes
9	Comments	Used to specify additional information about the refund request.	No
10	Effective Date1, Effective Date2, ..., Effective Date5	Used to specify the date from when the characteristic is effective for the refund request.	Yes (Conditional) **Note:** This data is required when the characteristic type is specified in the record.
11	Char Type1, Char Type2, ..., Char Type5	Used to specify the characteristic type. **Note:** You must specify a characteristic type where the characteristic entity is set to **Refund/ Write Off Request**. You can specify maximum 5 characteristics in the record.	No
12	Char Val1, Char Val2, ..., Char Val5	Used to specify the value for the characteristic type.	Yes (Conditional) **Note:** This data is required when the characteristic type is specified in the record.

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Note:

The CSV file should contain the columns in the above mentioned sequence. You can add five sets of characteristics — each set containing Effective Date, Char Type, and Char Val followed by the subsequent set (i.e., Effective Date1, Char Type1, Char Val1, Effective Date2, Char Type2, Char Val2, Effective Date3, Char Type3, Char Val3, Effective Date4, Char Type4, Char Val4, Effective Date5, Char Type5, Char Val5).

Before uploading the file, ensure that the column headers specified in the CSV file are mapped to the schema of the respective upload request business object through data mapping in the upload request type. Otherwise, erroneous results might occur. For more information, see Mapping Data and Configuring Filters for an Upload Request Type on page 1433.

Sample Mass Refund Request Creation CSV File

```
Refund Request Type,Account Identifier Type,Account Identifier,Account ID,Entity Type,Entity ID,Adjustment Type,Refund Amount,Comments,Effective
Date1,Char Type1,Char Val1,Effective Date2,Char Type2,Char Val2,Effective Date3,Char Type3,Char Val3,Effective Date4,Char Type4,Char Val4,Effective
Date5,Char Type5,Char Val5,
REF_REQ_TPE_WO_APPR,,,2321321322,Bill,23213500001,REFUND,50,Refund on Overpaymemt,2025-10-10,CRMEMO,N,,,,,,,,,,,,
REF_REQ_TPE_WO_APPR,,,2321687544,Bill Segment,23213700100,REFUND,100,Refund on Overpaymemt,2025-10-10,CRMEMO,Y,,,,,,,,,,,,
REF_REQ_TPE_WO_APPR,,,2321687544,Adjustment,67665545444,REFUND,30,Refund,2025-10-10,CRMEMO,N,,,,,,,,,,,,
REF_REQ_TPE_WO_APPR,,,3545789899,Payment,67665564599,REFUND,120,Refund on Overpaymemt,2025-10-10,CRMEMO,N,,,,,,,,,,,,
REF_REQ_TPE_WO_APPR,,,3545789700,Payment Event,76445446678,REFUND,100,Refund on Overpaymemt,2025-10-10,CRMEMO,N,,,,,,,,,,,,
```

Mass Write Off Request Creation

Oracle Revenue Management and Billing provides the ability to create multiple write off requests at once through the **Upload Request** feature. The system allows you to write off a debit bill or a debit bill line item (i.e., a bill segment or an adjustment) of an account through a write off request. The **C1-WriteOffUploadRequest** business object enables you to create an upload request for mass write off request creation.

Note: At present, you can only create new write off requests and not update existing write off requests through the **Upload Request** feature.

You need to create an upload request type for the **C1-WriteOffUploadRequest** business object. You can then upload a mass write off request creation file in the CSV format using the respective upload request type. The mass write off request creation file should contain records with the following information – write off request type, account details, entity type, entity ID, write off adjustment type, write off amount, comments, and write off characteristics. For more information, see Mass Write Off Request Creation CSV Format.

Note: You can specify maximum 5 characteristics in the record.

On uploading a mass write off request creation file, the system creates an upload request in the **Draft** status. The data records are created in the **Pending** status. The system validates the following for each record:

- Either the account ID or account identifier type and account identifier is specified in the record.
- Write off request type, entity type, entity ID and write off amount are specified in the record.
- If the entity type is **Bill**, then the bill ID given in the record is valid.
- If the entity type is **Bill Segment**, then the bill segment ID given in the record is valid.
- If the entity type is **Adjustment**, then the adjustment ID given in the record is valid.

Based on the entity type and entity ID, the system derives the original amount and currency of the respective entity. If the adjustment type is not specified in the record, the system derives the adjustment type from the respective write off request type. Similarly, if the account ID is not specified in the record, the system derives the account ID using the respective account identifier type and account identifier combination.

If the system could not derive the adjustment type, or account ID using the account identifier type and account identifier combination, the status of the record is changed to **Invalid**. In addition, if any of the above validations fail, the status of the record is changed to **Invalid**.

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Note:

If the mandatory data is missing in any record of the file, the system will not allow you to create an upload request.

The system does not allow you to upload a file which exceeds 700 KB. Therefore, you must ensure that the file size is within the maximum limit.

On clicking the **Validate** button, the system checks whether the upload request must be validated in the real time (i.e., immediately) or in the deferred mode (i.e., in the background). If the total number of records in the upload request does not exceed the online record validate limit, the system validates the following in the real time:

- The account ID given in the record is valid.
- The entity type is a valid and active value of the **REF_WO_ENTITY_FLG** lookup field.
- The entity type given in the record for the entity ID is correct.
- The entity (i.e., bill, bill segment, or adjustment) exists for the respective account in the system.
- The bill ID given in the record is in the **Complete** status.
- The bill segment ID or adjustment ID given in the record is in the **Frozen** status.
- The given adjustment is present on any bill of the respective account.
- The write off request type given in the record is valid and in the **Active** status. Its action flag is set to **Write Off** .
- The write off amount is less than zero.
- The write off amount is not greater than the eligible write off amount and the eligible write off amount is not equal to zero.
- The adjustment type given in the record is valid and its **A/P Request Type Code** flag is set to **Refund**.
- One record with a bill (for example, B01) and another record with the bill segment (for example, BS01) or adjustment (for example, AD01) of the same bill (i.e., B01) are not present in the upload request.
- The amount matches the decimal positions of the respective currency.
- The entity is not already included in any write off request that is in the non-final status.
- The characteristic type given in the record is valid and its characteristic entity is set to **Refund/Write Off Request**.
- The adhoc characteristic values are validated as per the validations defined in the respective algorithm.
- The predefined characteristic value is already defined for the characteristic type.
- The foreign key reference characteristic value is valid.
- The two or more records with the same entity type and entity ID combination do not exist in the upload request.

Note:

If the account ID is invalid, the system derives the account ID using the respective account identifier type and account identifier combination. If the system could not derive the account ID using the account identifier type and account identifier combination, the status of the record is changed to **Invalid**.

If duplicate records exist in the upload request, the system validates and changes the status of one record to **Valid** and the status of the remaining records to **Invalid**.

If any of above validations fail, the status of the record is changed to **Invalid**. However, if all the above validations are successful, the status of the record is changed to **Valid**. Once all the pending records in the upload request are validated, the status of the upload request is changed to **Validated**.

However, if the total number of records in the upload request exceeds the online record validate limit, the system changes the status of the upload request to **Deferred Validation**. The system then validates the records and changes the status of the upload request from **Deferred Validation** to **Validated** when the **C1-UPLRQ** batch is executed.

On clicking the **Submit** button, the system checks whether the approval is required for the upload request. If the approval is required for the upload request, the status of the upload request is changed to **Approval In Progress**. However, if the approval is not required for the upload request, the status of the upload request is changed to **Submitted**.

The approver can either approve or reject the upload request based on the observations. On approving an upload request, the status of the upload request is changed to **Approved**. However, on rejecting an upload request, the status of the upload request is changed to **Rejected**.

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Once the status of the upload request is changed to **Submitted** or **Approved**, the system checks whether the upload request must be processed in the real time (i.e., immediately) or in the deferred mode (i.e., in the background). If the number of valid records in the upload request does not exceed the online record process limit, the system changes the status of the upload request to **Processing**. However, if the number of valid records in the upload request exceeds the online record process limit, the system changes the status of the upload request to **Deferred Processing**. The system then changes the status of the upload request from **Deferred Processing** to **Processing** when the **C1-UPLRQ** batch is executed.

Once the status of the upload request is changed to **Processing**, the system fetches a list of records which are in the **Valid** status. For each valid record with a unique combination of the write off request type and account ID, the system creates a write off request for the account. However, if there are multiple entity IDs with the same combination, it adds all the entities in the same write off request.

If the **Approval Required** option is selected in the respective write off request type, the status of the write off request is set to **Approval In Progress**. However, if the **Approval Required** option is not selected in the respective write off request type, the system checks the number of entities added in the write off request. If the number of entities added in the write off request does not exceed the online record process limit, the system creates the write off adjustments using the write off adjustment type and then changes the status of the write off request to **Processed**. However, if the number of entities added in the write off request exceeds the online record process limit, the status of the write off request is set to **Deferred Processing**.

Once the write off request is successfully created, the status of the record is changed to **Processed**. However, if any error occurs while creating the write off request, the status of the record is changed to **Error**. Finally, the status of the upload request is changed to **Processed**.

Note:

The system creates the write off request using the entity business object specified in the respective upload request type.

This feature is tested and certified for both the financial services and health insurance domains.

Prerequisites

To setup the mass write off request creation feature, you need to do the following:

- Define the required upload request type where the upload request business object is set to **C1-WriteOffUploadRequest**.
- Assign the **C1-WOUR** To Do type to a To Do role whose users must receive a To Do while submitting a write off request creation upload request for approval.
- Define the required characteristic types where the characteristic entity is set to **Upload Request Type**.
- Define the required characteristic types where the characteristic entity is set to **Upload Request**.
- Define the required foreign key reference for write off request (if not available) in the system.
- Define the status reasons for the **Canceled** and **Rejected** statuses of the **C1-WriteOffUploadRequest** business object in the **Status Reason** screen.
- Define the required write off request types where the **Action** flag is set to **Write Off**.
- Define the required account identifier types in the system.
- Define the required adjustment types where the **A/P Request Type Code** flag is not set to **Refund**.
- Define the required characteristic types where the characteristic entity is set to **Refund/Write Off Request**.
- Set the batch control type of the **Upload Request Periodic Monitor (C1-UPLRQ)** batch to **Timed** and define the following attributes:
    - Time Interval
    - Timer Active
    - User ID
    - Batch Language
    - Email Address

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For more information about this batch, see *Oracle Revenue Management and Billing Batch Guide*.

Algorithms Used in C1-WriteOffUploadRequest

The following table lists the algorithms which are used in the lifecycle of the **C1-WriteOffUploadRequest** business object:

Status	System Event	Algorithm	Algorithm Type	Description
Draft	Enter	C1-WO-DERIV	C1-WO-DERIV	Refer to C1-WO-DERIV on page 2062.
Validating	Enter	C1-DEFERVALD	C1-DEFERVALD	Refer to C1-DEFERVALD on page 2037.
Deferred Validation	Monitor	F1-AT-RQJ	F1-GEN-BOMNJ	Refer to F1-AT-RQJ on page 225.
Validated	Enter	C1-WO-VALID	C1-WO-VALID	Refer to C1-WO-VALID on page 2063.
Canceled	-	-	-	-
Submitted	Enter	C1-UPLSUBENT	C1-UPLSUBENT	Refer to C1-UPLSUBENT on page 2023.
	Enter	C1-DEFERUPLD	C1-DEFERUPLD	Refer to C1-DEFERUPLD on page 2023.
	Monitor	F1-AT-RQJ	F1-GEN-BOMNJ	Refer to F1-AT-RQJ on page 225.
Approval In Progress	Enter	C1-UPLAPPENT	C1-UPLAPPENT	Refer to C1-UPLAPPENT on page 2024.
	Exit	C1-UPLAPPEXT	C1-UPLAPPEXT	Refer to C1-UPLAPPEXT on page 2024.
	Exit	F1-TODOCOMPL	F1-TODOCOMPL	Refer to F1-TODOCOMPL on page 1469.
Approved	Enter	C1-DEFERUPLD	C1-DEFERUPLD	Refer to C1-DEFERUPLD on page 2023.
	Monitor	F1-AT-RQJ	F1-GEN-BOMNJ	Refer to F1-AT-RQJ on page 225.
Rejected	-	-	-	-
Deferred Processing	Monitor	F1-AT-RQJ	F1-GEN-BOMNJ	Refer to F1-AT-RQJ on page 225.
Processing	Enter	C1-WO-PROC	C1-WO-PROC	Refer to C1-WO-PROC on page 2065.
	Monitor	F1-AT-RQJ	F1-GEN-BOMNJ	Refer to F1-AT-RQJ on page 225.
Processed	-	-	-	-

C1-WO-DERIV

This algorithm reads the data in the BO_DATA_AREA column of the C1_UPL_REQUEST table and accordingly inserts the records in the C1_UPLOAD_REQ_DTLS table. In addition, the status of each record in the C1_UPLOAD_REQ_DTLS table is set to **Pending**.

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It validates the following:

- Either the account ID or account identifier type and account identifier is specified in the record.
- Write off request type, entity type, entity ID and write off amount are specified in the record.
- If the entity type is **Bill**, then the bill ID given in the record is valid.
- If the entity type is **Bill Segment**, then the bill segment ID given in the record is valid.
- If the entity type is **Adjustment**, then the adjustment ID given in the record is valid.

Based on the entity type and entity ID, this algorithm derives the original amount and currency of the respective entity from the system. If the adjustment type is not specified in the record, this algorithm derives the adjustment type from the respective write off request type. Similarly, if the account ID is not specified in the record, it derives the account ID using the respective account identifier type and account identifier combination.

Once the adjustment type and/or account ID is derived, the corresponding record is updated in the C1_UPLOAD_REQ_DTLS table. If the system could not derive the adjustment type, or account ID using the account identifier type and account identifier combination, the status of the record in the C1_UPLOAD_REQ_DTLS table is changed to **Invalid**. In addition, if any of the above validations fail, the status of the record in the C1_UPLOAD_REQ_DTLS table is changed to **Invalid**.

This algorithm also derives the fields which can be used as search filters based on the mapping defined in the respective upload request type.

C1-DEFERVALD

This algorithm is invoked when the user clicks the **Validate** button. It checks whether the upload request must be validated in the real time (i.e., immediately) or in the deferred mode (i.e., in the background). If the total number of records in the upload request does not exceed the online record validate limit, it changes the status of the upload request to **Validated**. However, if the total number of records in the upload request exceeds the online record validate limit, it changes the status of the upload request to **Deferred Validation**.

It contains the following parameter:

- **Online Record Validate Limit** - Used to indicate the maximum number of records you can validate in the real time (i.e., immediately). This parameter is mandatory.

F1-AT-RQJ

This algorithm transitions the current status of the business object to the specified status. It contains the following parameters:

- **Next Status** – Used when you want to override the default next status specified in the lifecycle.
- **Next Transition Condition** – Used when you want to override the default next transition condition specified in the lifecycle.

At a time, you can specify value for either the **Next Status** or **Next Transition Condition** parameter. If you don't specify any value for these parameters, the system will transition the business object to the default next status specified in its lifecycle.

C1-WO-VALID

This algorithm is invoked when the user clicks the **Validate** button. It validates the records which are in the **Pending** status. It validates the following:

- The account ID given in the record is valid.

  Note: If the account ID is invalid, it derives the account ID using the respective account identifier type and account identifier combination. Once the account ID is derived, the corresponding record is updated in the C1_UPLOAD_REQ_DTLS table. If the system could not derive the account ID using the account identifier type and account identifier combination, the status of the record in the C1_UPLOAD_REQ_DTLS table is changed to **Invalid**.

- The entity type is a valid and active value of the **REF_WO_ENTITY_FLG** lookup field.

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- The entity type given in the record for the entity ID is correct.
- The entity (i.e., bill, bill segment, or adjustment) exists for the respective account in the system.
- The bill ID given in the record is in the **Complete** status.
- The bill segment ID or adjustment ID given in the record is in the **Frozen** status.
- The given adjustment is present on any bill of the respective account.
- The write off request type given in the record is valid and in the **Active** status. Its action flag is set to **Write Off** .
- The write off amount is less than zero.
- The write off amount is not greater than the eligible write off amount and the eligible write off amount is not equal to zero.
- The adjustment type given in the record is valid and its **A/P Request Type Code** flag is set to **Refund**.
- One record with a bill (for example, B01) and another record with the bill segment (for example, BS01) or adjustment (for example, AD01) of the same bill (i.e., B01) are not present in the upload request.
- The amount matches the decimal positions of the respective currency.
- The entity is not already included in any write off request that is in the non-final status.
- The characteristic type given in the record is valid and its characteristic entity is set to **Refund/Write Off Request**.
- The adhoc characteristic values are validated as per the validations defined in the respective algorithm.
- The predefined characteristic value is already defined for the characteristic type.
- The foreign key reference characteristic value is valid.
- The two or more records with the same entity type and entity ID combination do not exist in the upload request.

Note: If duplicate records exist in the upload request, it validates and changes the status of one record to **Valid** and the status of the remaining records to **Invalid**.

If any of above validations fail, the status of the record in the C1_UPLOAD_REQ_DTLS table is changed to **Invalid**. However, if all the above validations are successful, the status of the record in the C1_UPLOAD_REQ_DTLS table is changed to **Valid**. Once all the pending records in the upload request are validated, the status of the upload request is changed to **Validated**.

Note: If there are no pending records while validating an upload request, a message appears indicating that there are no records to be validated. In such case, you can only delete an upload request.

C1-UPLSUBENT

This algorithm is invoked when the user clicks the **Submit** button. It checks whether the approval is required for the upload request. If the approval is required for the upload request, the status of the upload request is changed to **Approval In Progress**. However, if the approval is not required for the upload request, the status of the upload request is changed to **Submitted**.

C1-DEFERUPLD

This algorithm is invoked when the status of the upload request is changed to **Submitted** or **Approved**. It checks whether the upload request must be processed in the real time (i.e., immediately) or in the deferred mode (i.e., in the background). If the number of valid records in the upload request does not exceed the online record process limit, it changes the status of the upload request to **Processing**. However, if the number of valid records in the upload request exceeds the online record process limit, it changes the status of the upload request to **Deferred Processing**.

It contains the following parameter:

- **Online Record Process Limit** - Used to indicate the maximum number of valid records you can process in the real time (i.e., immediately). This parameter is mandatory.

C1-UPLAPPENT

This algorithm is invoked when the status of the upload request is changed to **Approval In Progress**. It creates a To Do using the approval To Do type that is specified in the respective upload request type. Once a To Do is created, it is

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assigned to all the users with the approval To Do role that is specified in the respective upload request type. In addition, it creates a log entry for the upload request when the To Do is created for the approver.

C1-UPLAPPEXT

This algorithm is invoked when the user clicks the **Approve** or **Reject** button. It checks whether the approver is associated with the approval To Do role specified in the respective upload request type. If not, it does not allow the approver to approve or reject the upload request. In addition, it does not allow the submitter to approve or reject the upload request.

F1-TODOCOMPL

This algorithm completes the To Do entries that are linked to an object when the object exits the given status. It finds and completes all open To Do entries where the business object's primary key is defined as a drill key. However, if the **Exclude To Do Entries From Auto Completion** (**F1-EXLTD**) characteristic is set to **Y** for a To Do type, the system does not automatically complete the respective To Do entry.

This algorithm contains the following parameter:

- **'Do Not Complete To Do Type' Char Type** – Used to specify the characteristic type that indicates whether the To Do entries should be automatically completed or not.

Note: The **F1-EXLTD** characteristic type is shipped with the product. You can either use the **F1-EXLTD** characteristic type or a custom characteristic type, if required. Note that you must specify a predefined characteristic type where the characteristic entity is set to **To Do Type** and the predefined values are set to **Y** or **N**.

C1-WO-PROC

This algorithm is invoked when the status of the upload request is changed to **Processing**. It fetches a list of records which are in the **Valid** status. For each valid record with a unique combination of the write off request type and account ID, this algorithm creates a write off request for the account. However, if there are multiple entity IDs with the same combination, it adds all the entities in the same write off request.

Note: The system creates the write off request using the entity business object specified in the respective upload request type.

If the **Approval Required** option is selected in the respective write off request type, the status of the write off request is set to **Approval In Progress**. However, if the **Approval Required** option is not selected in the respective write off request type, the system checks the number of entities added in the write off request. If the number of entities added in the write off request does not exceed the online record process limit, the system creates the write off adjustments using the write off adjustment type and then changes the status of the write off request to **Processed**. However, if the number of entities added in the write off request exceeds the online record process limit, the status of the write off request is set to **Deferred Processing**.

If the record is successfully processed, the status of the record is changed to **Processed**. However, if the record could not be processed successfully due to any reason, the status of the record is changed to **Error**. Finally, the status of the upload request is changed to **Processed**.

Mass Write Off Request Creation CSV Format

The following table lists and describes the columns that should be available in the CSV file while creating multiple write off requests at once through an upload request:

Sr. No.	Column Name	Description	Mandatory (Yes or No)
1	Write Off Request Type	Used to specify the write off request type using which you want to create the write off request.	Yes

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Sr. No.	Column Name	Description	Mandatory (Yes or No)
		Note: You must specify a write off request type which is already defined in the system. It should be in the **Active** status.	
2	Account Identifier Type	Used to specify the account identifier type.	Yes (Conditional)
		Note: You must specify an account identifier type which is already defined in the system.	**Note:** This data is required when the account ID is not specified in the record.
3	Account Identifier	Used to specify the account identifier.	Yes (Conditional)
		Note: The system derives the account using the given account identifier type and account identifier combination when the account ID is either not specified or is invalid in the record.	**Note:** This data is required when the account ID is not specified in the record.
4	Account ID	Used to indicate the account for which you want to create the write off request.	Yes (Conditional)
			Note: This data is required when the account identifier type and account identifier are not specified in the record.
5	Entity Type	Used to specify the entity type. The valid values are: • **Bill** - Used when you want to write off a debit bill of an account through a write off request. • **Bill Segment** - Used when you want to write off a debit bill segment of a bill through a write off request. • **Adjustment** - Used when you want to write off a debit adjustment of a bill through a write off request.	Yes
		Note: You must specify a value which is already defined in the **REF_WO_ENTITY_FLG** lookup field. It should be in the **Active** status.	
6	Entity ID	Used to specify the entity ID.	Yes

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Sr. No.	Column Name	Description	Mandatory (Yes or No)
		Note: Here, you can specify the bill ID, bill segment ID, or adjustment ID depending on the specified entity type. The specified bill should be in the **Complete** status. The specified bill segment should be in the **Frozen** status. The specified adjustment should be in the **Frozen** status.	
7	Adjustment Type	Used to specify the adjustment type using which you want to create the write off adjustment for the entity. **Note:** You must specify an adjustment type which is already defined in the system. Its **A/P Request Type Code** flag should not be set to **Refund**. If you do not specify the adjustment type, the system considers the write off adjustment type specified in the respective write off request type.	No
8	Write Off Amount	Used to specify the amount that you want to write off. **Note:** You must specify a number greater than zero but less than or equal to the eligible write off amount. You must specify a number with decimal positions less than or equal to the decimal positions defined for the respective currency.	Yes
9	Comments	Used to specify additional information about the write off request.	No
10	Effective Date1, Effective Date2, ..., Effective Date5	Used to specify the date from when the characteristic is effective for the write off request.	Yes (Conditional) **Note:** This data is required when the characteristic type is specified in the record.

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Sr. No.	Column Name	Description	Mandatory (Yes or No)
11	Char Type1, Char Type2, ..., Char Type5	Used to specify the characteristic type. **Note:** You must specify a characteristic type where the characteristic entity is set to **Refund/ Write Off Request**. You can specify maximum 5 characteristics in the record.	No
12	Char Val1, Char Val2, ..., Char Val5	Used to specify the value for the characteristic type.	Yes (Conditional) **Note:** This data is required when the characteristic type is specified in the record.

Note:

The CSV file should contain the columns in the above mentioned sequence. You can add five sets of characteristics — each set containing Effective Date, Char Type, and Char Val followed by the subsequent set (i.e., Effective Date1, Char Type1, Char Val1, Effective Date2, Char Type2, Char Val2, Effective Date3, Char Type3, Char Val3, Effective Date4, Char Type4, Char Val4, Effective Date5, Char Type5, Char Val5).

Before uploading the file, ensure that the column headers specified in the CSV file are mapped to the schema of the respective upload request business object through data mapping in the upload request type. Otherwise, erroneous results might occur. For more information, see Mapping Data and Configuring Filters for an Upload Request Type on page 1433.

Sample Mass Write Off Request Creation CSV File

```
Write Off Request Type,Account Identifier Type,Account Identifier,Account ID,Entity Type,Entity ID,Adjustment Type,Write Off Amount,Comments,Effective
Date1,Char Type1,Char Val1,Effective Date2,Char Type2,Char Val2,Effective Date3,Char Type3,Char Val3,Effective Date4,Char Type4,Char Val4,Effective
Date5,Char Type5,Char Val5,
REF_REQ_TPE_WO_APPR,,,2321321322,Bill,2321345633,WRITEOFF,50,Allowance for Doubtful Account,2025-10-10,SHOWRT,N,,,,,,,,,,,
REF_REQ_TPE_WO_APPR,,,2321321334,Bill Segment,2321345620,WRITEOFF,100,Bad Debt Expense,2025-10-10,SHOWRT,Y,,,,,,,,,,,,
REF_REQ_TPE_WO_APPR,,,7655321334,Adjustment,2321765620,WRITEOFF,20,Bad Debt Expense,2025-10-10,SHOWRT,Y,,,,,,,,,,,,
```

Mass Policy Reinstatement

Oracle Revenue Management and Billing provides the ability to reinstate multiple fully insured group policies at once through the **Upload Request** feature. The **C1-ReinstatementUploadRequest** business object enables you to create an upload request for mass policy reinstatement.

You need to create an upload request type for the **C1-ReinstatementUploadRequest** business object. You can then upload a mass policy reinstatement file in the CSV format using the respective upload request type. The mass policy reinstatement file should contain records with the following information – policy ID or source system and policy number, and reinstatement reason. For more information, see Mass Policy Reinstatement CSV Format.

On uploading a mass policy reinstatement file, the system creates an upload request in the **Draft** status. The data records are created in the **Pending** status. The system validates the following for each record:

- Either the policy ID or source system and policy number is specified in the record.
- Reinstatement reason is specified in the record.

If the policy ID is not specified in the record, the system derives the policy ID using the respective source system and policy number combination. If the system could not derive the policy ID using the source system and policy number

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combination, the status of the record is changed to **Invalid**. In addition, if any of the above validations fail, the status of the record is changed to **Invalid**.

Note:

If the reinstatement reason is missing in any record of the file, the system will not allow you to create an upload request.

The system does not allow you to upload a file which exceeds 700 KB. Therefore, you must ensure that the file size is within the maximum limit.

On clicking the **Validate** button, the system validates the following:

- The policy ID given in the record is valid.
- The reinstatement reason is valid for the status specified in the **Policy Reinstatement Status for Reason Verification** parameter of the **C1-REN-VALID** algorithm.
- The two or more records with the same policy ID do not exist in the upload request.

Note:

If the policy ID is invalid, the system derives the policy ID using the respective source system and policy number combination. If the system could not derive the policy ID using the source system and policy number combination, the status of the record is changed to **Invalid**.

If duplicate records exist in the upload request, the system validates and changes the status of one record to **Valid** and the status of the remaining records to **Invalid**.

If any of above validations fail, the status of the record is changed to **Invalid**. However, if all the above validations are successful, the status of the record is changed to **Valid**. Once all the pending records in the upload request are validated, the status of the upload request is changed to **Validated**.

On clicking the **Submit** button, the system checks whether the approval is required for the upload request. If the approval is required for the upload request, the status of the upload request is changed to **Approval In Progress**. However, if the approval is not required for the upload request, the status of the upload request is changed to **Submitted**.

The approver can either approve or reject the upload request based on the observations. On approving an upload request, the status of the upload request is changed to **Approved**. However, on rejecting an upload request, the status of the upload request is changed to **Rejected**.

Once the status of the upload request is changed to **Submitted** or **Approved**, the system checks whether the upload request must be processed in the real time (i.e., immediately) or in the deferred mode (i.e., in the background). If the number of valid records in the upload request does not exceed the online record process limit, the system changes the status of the upload request to **Processing**. However, if the number of valid records in the upload request exceeds the online record process limit, the system changes the status of the upload request to **Deferred Processing**. The system then changes the status of the upload request from **Deferred Processing** to **Processing** when the **C1-UPLRQ** batch is executed.

Once the status of the upload request is changed to **Processing**, the system fetches a list of records which are in the **Valid** status. For each valid record, the system reinstates the respective fully insured group policy and changes its status to **Pending Reinstatement**.

Once the policy status is successfully updated, the status of the record is changed to **Processed**. However, if any error occurs while updating the policy status, the status of the record is changed to **Error**. Finally, the status of the upload request is changed to **Processed**.

Note:

The system updates the policy using the entity business object specified in the respective upload request type.

This feature is tested and certified for the health insurance domain.

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Prerequisites

To setup the mass policy reinstatement feature, you need to do the following:

- Define the required upload request type where the upload request business object is set to **C1-ReinstatementUploadRequest**.
- Assign the **C1-RPUR** To Do type to a To Do role whose users must receive a To Do while submitting a policy reinstatement upload request for approval.
- Define the required characteristic types where the characteristic entity is set to **Upload Request Type**.
- Define the required characteristic types where the characteristic entity is set to **Upload Request**.
- Define the required foreign key reference for policy (if not available) in the system.
- Define the status reasons for the **Canceled** and **Rejected** statuses of the **C1-ReinstatementUploadRequest** business object in the **Status Reason** screen.
- Define the required source systems in the **Source System (C1-SourceSystemLookup)** extendable lookup.
- Define the status reasons for the **Reinstated** status of the **C1-POLICY** business object in the **Status Reason** screen.
- Define the parameters in the **C1-REN-VALID** and **C1-REN-PROC** algorithms attached to the lifecycle of the **C1-ReinstatementUploadRequest** business object.
- Set the batch control type of the **Upload Request Periodic Monitor (C1-UPLRQ)** batch to **Timed** and define the following attributes:
  - Time Interval
  - Timer Active
  - User ID
  - Batch Language
  - Email Address

  For more information about this batch, see *Oracle Revenue Management and Billing Batch Guide*.

Algorithms Used in C1-ReinstatementUploadRequest

The following table lists the algorithms which are used in the lifecycle of the **C1-ReinstatementUploadRequest** business object:

Status	System Event	Algorithm	Algorithm Type	Description
Draft	Enter	C1-CRTUPLDTL	C1-CRTUPLDTL	Refer to C1-CRTUPLDTL on page 2071.
	Enter	C1-REN-DERIV	C1-REN-DERIV	Refer to C1-REN-DERIV on page 2071.
Validated	Enter	C1-REN-VALID	C1-REN-VALID	Refer to C1-REN-VALID on page 2071.
Canceled	-	-	-	-
Submitted	Enter	C1-UPLSUBENT	C1-UPLSUBENT	Refer to C1-UPLSUBENT on page 2023.
	Enter	C1-DEFERUPLD	C1-DEFERUPLD	Refer to C1-DEFERUPLD on page 2023.
	Monitor	F1-AT-RQJ	F1-GEN-BOMNJ	Refer to F1-AT-RQJ on page 225.
Approval In Progress	Enter	C1-UPLAPPENT	C1-UPLAPPENT	Refer to C1-UPLAPPENT on page 2024.

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Status	System Event	Algorithm	Algorithm Type	Description
	Exit	C1-UPLAPPEXT	C1-UPLAPPEXT	Refer to C1-UPLAPPEXT on page 2024.
	Exit	F1-TODOCOMPL	F1-TODOCOMPL	Refer to F1-TODOCOMPL on page 1469.
Approved	Enter	C1-DEFERUPLD	C1-DEFERUPLD	Refer to C1-DEFERUPLD on page 2023.
	Monitor	F1-AT-RQJ	F1-GEN-BOMNJ	Refer to F1-AT-RQJ on page 225.
Rejected	-	-	-	-
Deferred Processing	Monitor	F1-AT-RQJ	F1-GEN-BOMNJ	Refer to F1-AT-RQJ on page 225.
Processing	Enter	C1-REN-PROC	C1-REN-PROC	Refer to C1-REN-PROC on page 2073.
	Monitor	F1-AT-RQJ	F1-GEN-BOMNJ	Refer to F1-AT-RQJ on page 225.
Processed	-	-	-	-

C1-CRTUPLDTL

This algorithm reads the data in the BO_DATA_AREA column of the C1_UPL_REQUEST table and accordingly inserts the records in the C1_UPLOAD_REQ_DTLS table. In addition, the status of each record in the C1_UPLOAD_REQ_DTLS table is set to **Pending**.

C1-REN-DERIV

This algorithm validates the following:

- Either the policy ID or source system and policy number is specified in the record.
- Reinstatement reason is specified in the record.

If the policy ID is not specified in the record, it derives the policy ID using the respective source system and policy number combination. Once the policy ID is derived, the corresponding record is updated in the C1_UPLOAD_REQ_DTLS table. If the system could not derive the policy ID using the source system and policy number combination, the status of the record in the C1_UPLOAD_REQ_DTLS table is changed to **Invalid**. In addition, if any of the above validations fail, the status of the record in the C1_UPLOAD_REQ_DTLS table is changed to **Invalid**.

This algorithm also derives the fields which can be used as search filters based on the mapping defined in the respective upload request type.

C1-REN-VALID

This algorithm is invoked when the user clicks the **Validate** button. It validates the records which are in the **Pending** status. It validates the following:

- The policy ID given in the record is valid.

  Note: If the policy ID is invalid, it derives the policy ID using the respective source system and policy number combination. Once the policy ID is derived, the corresponding record is updated in the C1_UPLOAD_REQ_DTLS table. If the system could not derive the policy ID using the source system and policy number combination, the status of the record in the C1_UPLOAD_REQ_DTLS table is changed to **Invalid**.
- The reinstatement reason is valid for the status specified in the **Policy Reinstatement Status for Reason Verification** parameter.
- The two or more records with the same policy ID do not exist in the upload request.

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> **Note:** If duplicate records exist in the upload request, it validates and changes the status of one record to **Valid** and the status of the remaining records to **Invalid**.

If any of above validations fail, the status of the record in the C1_UPLOAD_REQ_DTLS table is changed to **Invalid**. However, if all the above validations are successful, the status of the record in the C1_UPLOAD_REQ_DTLS table is changed to **Valid**. Once all the pending records in the upload request are validated, the status of the upload request is changed to **Validated**.

> **Note:** If there are no pending records while validating an upload request, a message appears indicating that there are no records to be validated. In such case, you can only delete an upload request.

This algorithm contains the following parameters:

- **Policy Status after Processing Reinstatement Upload Request** - Used to specify the status to which you want to transition the policy when the policy reinstatement upload request is processed.

  > **Note:** Here, you must specify the **PENDREINSTAT** status defined in the lifecycle of the **C1-POLICY** business object. The system will then transition the respective fully insured group policy to the **Pending Reinstatement** status when the policy reinstatement upload request is processed.

- **Policy Reinstatement Status for Reason Verification** - Used to specify the status against which you want to validate the given reinstatement reason.

  > **Note:** Here, you must specify the **REINSTATE** status defined in the lifecycle of the **C1-POLICY** business object. The system will then validate whether the given reason is already defined for the **Reinstated** status of the **C1-POLICY** business object.

Both the above parameters are mandatory.

C1-UPLSUBENT

This algorithm is invoked when the user clicks the **Submit** button. It checks whether the approval is required for the upload request. If the approval is required for the upload request, the status of the upload request is changed to **Approval In Progress**. However, if the approval is not required for the upload request, the status of the upload request is changed to **Submitted**.

C1-DEFERUPLD

This algorithm is invoked when the status of the upload request is changed to **Submitted** or **Approved**. It checks whether the upload request must be processed in the real time (i.e., immediately) or in the deferred mode (i.e., in the background). If the number of valid records in the upload request does not exceed the online record process limit, it changes the status of the upload request to **Processing**. However, if the number of valid records in the upload request exceeds the online record process limit, it changes the status of the upload request to **Deferred Processing**.

It contains the following parameter:

- **Online Record Process Limit** - Used to indicate the maximum number of valid records you can process in the real time (i.e., immediately). This parameter is mandatory.

F1-AT-RQJ

This algorithm transitions the current status of the business object to the specified status. It contains the following parameters:

- **Next Status** – Used when you want to override the default next status specified in the lifecycle.
- **Next Transition Condition** – Used when you want to override the default next transition condition specified in the lifecycle.

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At a time, you can specify value for either the **Next Status** or **Next Transition Condition** parameter. If you don't specify any value for these parameters, the system will transition the business object to the default next status specified in its lifecycle.

C1-UPLAPPENT

This algorithm is invoked when the status of the upload request is changed to **Approval In Progress**. It creates a To Do using the approval To Do type that is specified in the respective upload request type. Once a To Do is created, it is assigned to all the users with the approval To Do role that is specified in the respective upload request type. In addition, it creates a log entry for the upload request when the To Do is created for the approver.

C1-UPLAPPEXT

This algorithm is invoked when the user clicks the **Approve** or **Reject** button. It checks whether the approver is associated with the approval To Do role specified in the respective upload request type. If not, it does not allow the approver to approve or reject the upload request. In addition, it does not allow the submitter to approve or reject the upload request.

F1-TODOCOMPL

This algorithm completes the To Do entries that are linked to an object when the object exits the given status. It finds and completes all open To Do entries where the business object's primary key is defined as a drill key. However, if the **Exclude To Do Entries From Auto Completion** (**F1-EXLTD**) characteristic is set to **Y** for a To Do type, the system does not automatically complete the respective To Do entry.

This algorithm contains the following parameter:

- **'Do Not Complete To Do Type' Char Type** – Used to specify the characteristic type that indicates whether the To Do entries should be automatically completed or not.

> **Note:** The **F1-EXLTD** characteristic type is shipped with the product. You can either use the **F1-EXLTD** characteristic type or a custom characteristic type, if required. Note that you must specify a predefined characteristic type where the characteristic entity is set to **To Do Type** and the predefined values are set to **Y** or **N**.

C1-REN-PROC

This algorithm is invoked when the status of the upload request is changed to **Processing**. It fetches a list of records which are in the **Valid** status. For each valid record, this algorithm reinstates the respective fully insured group policy and changes its status to **Pending Reinstatement**.

> **Note:** The system updates the policy using the entity business object specified in the respective upload request type.

If the record is successfully processed, the status of the record is changed to **Processed**. However, if the record could not be processed successfully due to any reason, the status of the record is changed to **Error**. Finally, the status of the upload request is changed to **Processed**.

This algorithm contains the following parameter:

- **Policy Status after Processing Reinstatement Upload Request** - Used to specify the status to which you want to transition the policy when the policy reinstatement upload request is processed.

> **Note:** Here, you must specify the **PENDREINSTAT** status defined in the lifecycle of the **C1-POLICY** business object. The system will then transition the respective fully insured group policy to the **Pending Reinstatement** status when the policy reinstatement upload request is processed.

The above parameter is mandatory.

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Mass Policy Reinstatement CSV Format

The following table lists and describes the columns that should be available in the CSV file while reinstating multiple fully insured group policies at once through an upload request:

Sr. No.	Column Name	Description	Mandatory (Yes or No)
1	Policy ID	Used to indicate the fully insured group policy that you want to reinstate. **Note:** If you do not specify the policy ID, the system derives the policy ID using the source system and policy number combination.	No
2	Source System	Used to indicate the external system from where the policy is originated. **Note:** You must specify a source system which is already defined in the **Source System (C1-SourceSystemLookup)** extendable lookup.	Yes (Conditional) **Note:** This data is required when the policy ID is not specified in the record.
3	Policy Number	Used to indicate the policy number.	Yes (Conditional) **Note:** This data is required when the policy ID is not specified in the record.
4	Reinstatement Reason	Used to indicate the reason why you want to reinstate the policy. **Note:** You must specify a reason which is defined for the status specified in the **Policy Reinstatement Status for Reason Verification** parameter of the **C1-REN-VALID** algorithm.	Yes

Note:

The CSV file should contain the columns in the above mentioned sequence.

Before uploading the file, ensure that the column headers specified in the CSV file are mapped to the schema of the respective upload request business object through data mapping in the upload request type. Otherwise, erroneous results might occur. For more information, see Mapping Data and Configuring Filters for an Upload Request Type on page 1433.

Sample Mass Policy Reinstatement CSV File

```
Policy ID,Source System,Policy Number,Reinstatement Reason
10680414921602,SR01,P6887569,MISSEDPREM
,SR02,G4556778,MISSEDPREM
,SR01,P8785644,MISSEDPREM
,SR01,P6554466,MISSEDPREM
57581540246700,,,MISSEDPREM
,SR02,G9088767,MISSEDPREM
,SR02,G2345678,MISSEDPREM
```

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Mass Bill Group Sort Record Creation

Oracle Revenue Management and Billing provides the ability to add sort records for multiple bill groups at once through the **Upload Request** feature. The system allows you to create sort records for multiple bill groups of a single parent customer at a time through an upload request. The specified bill groups (i.e., child persons whose person type is set to **Bill Group**) should be related to the parent customer using the relationship type that is specified in the **Person Relationship Type** option type of the **C1-ASOBLLNG** feature configuration. The **C1-BillGrpSortUploadRequest** business object enables you to create an upload request for mass bill group sort record creation.

You need to create an upload request type for the **C1-BillGrpSortUploadRequest** business object. You can then upload a mass bill group sort record creation file in the CSV format using the respective upload request type. The mass bill group sort record creation file should contain records with the following information – bill group ID or bill group identifier type and bill group identifier, sort ID, description, start date, and end date. For more information, see Mass Bill Group Sort Record Creation CSV Format.

While uploading a mass bill group sort record creation file, you need to specify the parent customer whose bill groups' sort records you want to create. On uploading a mass bill group sort record creation file, the system creates an upload request in the **Draft** status. The data records are created in the **Pending** status. The system validates the following for each record:

- Either the bill group (i.e., person) ID or bill group (i.e., person) identifier type and bill group (i.e., person) identifier is specified in the record.
- Sort ID, description, start date, and end date are specified in the record.

If the bill group ID is not specified in the record, the system derives the bill group ID using the respective bill group identifier type and bill group identifier combination. If the system could not derive the bill group ID using the bill group identifier type and bill group identifier combination, the status of the record is changed to **Invalid**. In addition, if any of the above validations fail, the status of the record is changed to **Invalid**.

Note:

If the mandatory data is missing in any record of the file, the system will not allow you to create an upload request.

The system does not allow you to upload a file which exceeds 700 KB. Therefore, you must ensure that the file size is within the maximum limit.

On clicking the **Validate** button, the system validates the following:

- The bill group (i.e., person) ID given in the record is valid.
- The parent customer's person type is set to **Parent Customer** in the system.
- The end date is not earlier than the start date and the start date is not later than the end date.
- The bill group identifier type is available when the bill group identifier is specified in the record and vice versa.
- The bill group is the child person of the parent customer.
- The bill group's person type is set to **Bill Group** in the system.
- The relationship between the bill group and parent customer is effective on the system date.
- The bill group is related to the parent customer using the relationship type that is specified in the **Person Relationship Type** option type of the **C1-ASOBLLNG** feature configuration.
- A duplicate record with the bill group ID and sort ID combination does not exist in the C1_BILL_LVL table.
- The two or more records with the same bill group ID and sort ID combination do not exist in the upload request.

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Note:

If the bill group ID is invalid, the system derives the bill group ID using the respective bill group identifier type and bill group identifier combination. If the system could not derive the bill group ID using the bill group identifier type and bill group identifier combination, the status of the record is changed to **Invalid**.

If duplicate records exist in the upload request, the system validates and changes the status of one record to **Valid** and the status of the remaining records to **Invalid**.

If any of above validations fail, the status of the record is changed to **Invalid**. However, if all the above validations are successful, the status of the record is changed to **Valid**. Once all the pending records in the upload request are validated, the status of the upload request is changed to **Validated**.

On clicking the **Submit** button, the system checks whether the approval is required for the upload request. If the approval is required for the upload request, the status of the upload request is changed to **Approval In Progress**. However, if the approval is not required for the upload request, the status of the upload request is changed to **Submitted**.

The approver can either approve or reject the upload request based on the observations. On approving an upload request, the status of the upload request is changed to **Approved**. However, on rejecting an upload request, the status of the upload request is changed to **Rejected**.

Once the status of the upload request is changed to **Submitted** or **Approved**, the system checks whether the upload request must be processed in the real time (i.e., immediately) or in the deferred mode (i.e., in the background). If the number of valid records in the upload request does not exceed the online record process limit, the system changes the status of the upload request to **Processing**. However, if the number of valid records in the upload request exceeds the online record process limit, the system changes the status of the upload request to **Deferred Processing**. The system then changes the status of the upload request from **Deferred Processing** to **Processing** when the **C1-UPLRQ** batch is executed.

Once the status of the upload request is changed to **Processing**, the system fetches a list of records which are in the **Valid** status. For each valid record, the system creates a unique sort ID for the given bill group in the given date range.

Once the sort record is successfully created, the status of the record is changed to **Processed**. However, if any error occurs while creating the sort record, the status of the record is changed to **Error**. Finally, the status of the upload request is changed to **Processed**.

Note:

The system creates the bill group sort records using the entity business object specified in the respective upload request type.

This feature is tested and certified for the health insurance domain.

Prerequisites

To setup the mass bill group sort record creation feature, you need to do the following:

- Define the required upload request type where the upload request business object is set to **C1-BillGrpSortUploadRequest**.
- Create a To Do type named **C1-BGSRT** with the following specifications:
  - **Navigation Option** - c1upldrqTabMenu
  - **Sort Keys** - Define the following sort keys for the To Do type:

Sort Key	Use as Default	Sort Order
Upload Request ID	Yes	Descending

  - **Drill Keys** - Define the following drill keys for the To Do type:

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Table Name	Field Name
C1_UPLOAD_REQ	Upload Request ID

- Assign the **C1-BGSRT** To Do type to a To Do role whose users must receive a To Do while submitting a bill group sort record creation upload request for approval.
- Define the required characteristic types where the characteristic entity is set to **Upload Request Type**.
- Define the required characteristic types where the characteristic entity is set to **Upload Request**.
- Define the required foreign key reference for bill group (i.e., person (if not available)) in the system.
- Define the status reasons for the **Canceled** and **Rejected** statuses of the **C1-BillGrpSortUploadRequest** business object in the **Status Reason** screen.
- Define the required person identifier types in the system.
- Set the **Person Relationship Type** option type of the **C1-ASOBLLNG** feature configuration.
- Set the batch control type of the **Upload Request Periodic Monitor (C1-UPLRQ)** batch to **Timed** and define the following attributes:
  - Time Interval
  - Timer Active
  - User ID
  - Batch Language
  - Email Address

  For more information about this batch, see *Oracle Revenue Management and Billing Batch Guide*.

Related Topics

For more information on...	See...
How to setup the **C1-ASOBLLNG** feature configuration	Setting the C1-ASOBLLNG Feature Configuration on page 4417

Algorithms Used in C1-BillGrpSortUploadRequest

The following table lists the algorithms which are used in the lifecycle of the **C1-BillGrpSortUploadRequest** business object:

Status	System Event	Algorithm	Algorithm Type	Description
Draft	Enter	C1-BLSRTUPLD	C1-BLSRTUPLD	Refer to C1-BLSRTUPLD on page 2078.
	Enter	C1-BLSRTDERV	C1-BLSRTDERV	Refer to C1-BLSRTDERV on page 2078.
Validated	Enter	C1-BLSRTVALD	C1-BLSRTVALD	Refer to C1-BLSRTVALD on page 2078.
Canceled	-	-	-	-
Submitted	Enter	C1-UPLSUBENT	C1-UPLSUBENT	Refer to C1-UPLSUBENT on page 2023.
	Enter	C1-DEFERUPLD	C1-DEFERUPLD	Refer to C1-DEFERUPLD on page 2023.
	Monitor	F1-AT-RQJ	F1-GEN-BOMNJ	Refer to F1-AT-RQJ on page 225.

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Status	System Event	Algorithm	Algorithm Type	Description
Approval In Progress	Enter	C1-UPLAPPENT	C1-UPLAPPENT	Refer to C1-UPLAPPENT on page 2024.
	Exit	C1-UPLAPPEXT	C1-UPLAPPEXT	Refer to C1-UPLAPPEXT on page 2024.
	Exit	F1-TODOCOMPL	F1-TODOCOMPL	Refer to F1-TODOCOMPL on page 1469.
Approved	Enter	C1-DEFERUPLD	C1-DEFERUPLD	Refer to C1-DEFERUPLD on page 2023.
	Monitor	F1-AT-RQJ	F1-GEN-BOMNJ	Refer to F1-AT-RQJ on page 225.
Rejected	-	-	-	-
Deferred Processing	Monitor	F1-AT-RQJ	F1-GEN-BOMNJ	Refer to F1-AT-RQJ on page 225.
Processing	Enter	C1-BLSRTPROC	C1-BLSRTPROC	Refer to C1-BLSRTPROC on page 2080.
	Monitor	F1-AT-RQJ	F1-GEN-BOMNJ	Refer to F1-AT-RQJ on page 225.
Processed	-	-	-	-

C1-BLSRTUPLD

This algorithm reads the data in the BO_DATA_AREA column of the C1_UPL_REQUEST table and accordingly inserts the records in the C1_UPLOAD_REQ_DTLS table. In addition, the status of each record in the C1_UPLOAD_REQ_DTLS table is set to **Pending**.

C1-BLSRTDERV

This algorithm validates the following:

- Either the bill group (i.e., person) ID or bill group (i.e., person) identifier type and bill group (i.e., person) identifier is specified in the record.
- Sort ID, description, start date, and end date are specified in the record.

If the bill group ID is not specified in the record, it derives the bill group ID using the respective bill group identifier type and bill group identifier combination. Once the bill group ID is derived, the corresponding record is updated in the C1_UPLOAD_REQ_DTLS table. If the system could not derive the bill group ID using the bill group identifier type and bill group identifier combination, the status of the record in the C1_UPLOAD_REQ_DTLS table is changed to **Invalid**. In addition, if any of the above validations fail, the status of the record in the C1_UPLOAD_REQ_DTLS table is changed to **Invalid**.

This algorithm also derives the fields which can be used as search filters based on the mapping defined in the respective upload request type.

C1-BLSRTVALD

This algorithm is invoked when the user clicks the **Validate** button. It validates the records which are in the **Pending** status. It validates the following:

- The bill group (i.e., person) ID given in the record is valid.

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Note: If the bill group ID is invalid, it derives the bill group ID using the respective bill group (i.e., person) identifier type and bill group (i.e., person) identifier combination. Once the bill group ID is derived, the corresponding record is updated in the C1_UPLOAD_REQ_DTLS table. If the system could not derive the bill group ID using the bill group identifier type and bill group identifier combination, the status of the record in the C1_UPLOAD_REQ_DTLS table is changed to **Invalid**.

- The parent customer's person type is set to **Parent Customer** in the system.
- The end date is not earlier than the start date and the start date is not later than the end date.
- The bill group identifier type is available when the bill group identifier is specified in the record and vice versa.
- The bill group is the child person of the parent customer.
- The bill group's person type is set to **Bill Group** in the system.
- The relationship between the bill group and parent customer is effective on the system date.
- The bill group is related to the parent customer using the relationship type that is specified in the **Person Relationship Type** option type of the **C1-ASOBLLNG** feature configuration.
- A duplicate record with the bill group ID and sort ID combination does not exist in the C1_BILL_LVL table.
- The two or more records with the same bill group ID and sort ID combination do not exist in the upload request.

Note: If duplicate records exist in the upload request, it validates and changes the status of one record to **Valid** and the status of the remaining records to **Invalid**.

If any of above validations fail, the status of the record in the C1_UPLOAD_REQ_DTLS table is changed to **Invalid**. However, if all the above validations are successful, the status of the record in the C1_UPLOAD_REQ_DTLS table is changed to **Valid**. Once all the pending records in the upload request are validated, the status of the upload request is changed to **Validated**.

Note: If there are no pending records while validating an upload request, a message appears indicating that there are no records to be validated. In such case, you can only delete an upload request.

C1-UPLSUBENT

This algorithm is invoked when the user clicks the **Submit** button. It checks whether the approval is required for the upload request. If the approval is required for the upload request, the status of the upload request is changed to **Approval In Progress**. However, if the approval is not required for the upload request, the status of the upload request is changed to **Submitted**.

C1-DEFERUPLD

This algorithm is invoked when the status of the upload request is changed to **Submitted** or **Approved**. It checks whether the upload request must be processed in the real time (i.e., immediately) or in the deferred mode (i.e., in the background). If the number of valid records in the upload request does not exceed the online record process limit, it changes the status of the upload request to **Processing**. However, if the number of valid records in the upload request exceeds the online record process limit, it changes the status of the upload request to **Deferred Processing**.

It contains the following parameter:

- **Online Record Process Limit** - Used to indicate the maximum number of valid records you can process in the real time (i.e., immediately). This parameter is mandatory.

F1-AT-RQJ

This algorithm transitions the current status of the business object to the specified status. It contains the following parameters:

- **Next Status** – Used when you want to override the default next status specified in the lifecycle.
- **Next Transition Condition** – Used when you want to override the default next transition condition specified in the lifecycle.

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At a time, you can specify value for either the **Next Status** or **Next Transition Condition** parameter. If you don't specify any value for these parameters, the system will transition the business object to the default next status specified in its lifecycle.

C1-UPLAPPENT

This algorithm is invoked when the status of the upload request is changed to **Approval In Progress**. It creates a To Do using the approval To Do type that is specified in the respective upload request type. Once a To Do is created, it is assigned to all the users with the approval To Do role that is specified in the respective upload request type. In addition, it creates a log entry for the upload request when the To Do is created for the approver.

C1-UPLAPPEXT

This algorithm is invoked when the user clicks the **Approve** or **Reject** button. It checks whether the approver is associated with the approval To Do role specified in the respective upload request type. If not, it does not allow the approver to approve or reject the upload request. In addition, it does not allow the submitter to approve or reject the upload request.

F1-TODOCOMPL

This algorithm completes the To Do entries that are linked to an object when the object exits the given status. It finds and completes all open To Do entries where the business object's primary key is defined as a drill key. However, if the **Exclude To Do Entries From Auto Completion** (**F1-EXLTD**) characteristic is set to **Y** for a To Do type, the system does not automatically complete the respective To Do entry.

This algorithm contains the following parameter:

- **'Do Not Complete To Do Type' Char Type** – Used to specify the characteristic type that indicates whether the To Do entries should be automatically completed or not.

Note: The **F1-EXLTD** characteristic type is shipped with the product. You can either use the **F1-EXLTD** characteristic type or a custom characteristic type, if required. Note that you must specify a predefined characteristic type where the characteristic entity is set to **To Do Type** and the predefined values are set to **Y** or **N**.

C1-BLSRTPROC

This algorithm is invoked when the status of the upload request is changed to **Processing**. It fetches a list of records which are in the **Valid** status. For each valid record with a unique combination of the bill group (person) ID and sort ID, this algorithm creates a unique sort ID for the given bill group in the given date range.

Note: The system creates the bill group sort records using the entity business object specified in the respective upload request type.

If the record is successfully processed, the status of the record is changed to **Processed**. However, if the record could not be processed successfully due to any reason, the status of the record is changed to **Error**. Finally, the status of the upload request is changed to **Processed**.

Mass Bill Group Sort Record Creation CSV Format

The following table lists and describes the columns that should be available in the CSV file while adding sort records for multiple bill groups at once through an upload request:

Sr. No.	Column Name	Description	Mandatory (Yes or No)
1	Bill Group ID	Used to indicate the bill group (i.e., person) for whom you want to create the sort ID.	Yes (Conditional)

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Sr. No.	Column Name	Description	Mandatory (Yes or No)
		Note: You must specify an effective child person of the parent customer for whom you are creating the mass bill group sort record creation upload request. In addition, note that you must specify a child person whose person type is set to **Bill Group** and who is related to the parent customer using the relationship type that is specified in the **Person Relationship Type** option type of the **C1-ASOBLLNG** feature configuration.	**Note:** This data is required when the bill group (i.e., person) identifier type and bill group (i.e., person) identifier are not specified in the record.
2	Sort ID	Used to specify the sort ID.	Yes
3	Description	Used to specify the description for the sort record.	Yes
4	Start Date	Used to specify the date from when the sort record is effective for the bill group. **Note:** You must specify the date in the **YYYY-MM-DD** format. The start date cannot be later than the end date.	Yes
5	End Date	Used to specify the date till when the sort record is effective for the bill group. **Note:** You must specify the date in the **YYYY-MM-DD** format. The end date cannot be earlier than the start date.	Yes
6	Bill Group Identifier Type	Used to specify the person identifier type. **Note:** You must specify a person identifier type which is already defined in the system. You must specify the primary person identifier details of the respective person.	Yes (Conditional) **Note:** This data is required when the bill group ID is not specified in the record.
7	Bill Group Identifier	Used to specify the person identifier. **Note:** The system derives the person using the given person identifier type and person identifier combination when the person ID is either not specified or is invalid in the record.	Yes (Conditional) **Note:** This data is required when the bill group ID is not specified in the record.

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Note:

The CSV file should contain the columns in the above mentioned sequence.

Before uploading the file, ensure that the column headers specified in the CSV file are mapped to the schema of the respective upload request business object through data mapping in the upload request type. Otherwise, erroneous results might occur. For more information, see Mapping Data and Configuring Filters for an Upload Request Type on page 1433.

Sample Mass Bill Group Sort Record Creation CSV File

```
Bill Group ID,Bill Group Identifier Type,Bill Group Identifier,Sort ID,Description,Start Date,End Date
8819720965,SSN,007-35-2296,438,Grouping Order,2025-05-01,2025-08-31
8819720965,SSN,007-35-2296,439,Grouping Order,2025-09-01,2025-12-31
6644720965,SSN,007-35-7764,123,Reporting Order,2025-05-01,2025-08-01
```

Mass Bill Group Derivation and Pricing Parameters Record Creation

Oracle Revenue Management and Billing provides the ability to add bill group derivation and pricing parameters records for multiple bill groups at once through the **Upload Request** feature. The system allows you to create bill group derivation and pricing parameters records for multiple bill groups of a single parent customer at a time through an upload request. The specified bill groups (i.e., child persons whose person type is set to **Bill Group**) should be related to the parent customer using the relationship type that is specified in the **Person Relationship Type** option type of the **C1-ASOBLLNG** feature configuration. The **C1-BillLevelUploadRequest** business object enables you to create an upload request for mass bill group derivation and pricing parameters record creation.

You need to create an upload request type for the **C1-BillLevelUploadRequest** business object. You can then upload a mass bill group derivation and pricing parameters record creation file in the CSV format using the respective upload request type. The mass bill group derivation and pricing parameters record creation file should contain records with the following information – bill group ID or bill group identifier type and bill group identifier, sort ID, source system, bill level 1 (i.e., parameter 1), bill level 2 (i.e., parameter 2), bill level 3 (i.e., parameter 3), bill level 4 (i.e., parameter 4), and effective date. For more information, see Mass Bill Group Derivation and Pricing Parameters Record Creation CSV Format.

While uploading a mass bill group derivation and pricing parameters record creation file, you need to specify the parent customer whose bill groups' derivation and pricing parameters records you want to create. On uploading a mass bill group derivation and pricing parameters record creation file, the system creates an upload request in the **Draft** status. The data records are created in the **Pending** status. The system validates the following for each record:

- Either the bill group (i.e., person) ID or bill group (i.e., person) identifier type and bill group (i.e., person) identifier is specified in the record.
- Sort ID, source system, bill level 1 (i.e., parameter 1), and effective date are specified in the record.

If the bill group ID is not specified in the record, the system derives the bill group ID using the respective bill group identifier type and bill group identifier combination. If the system could not derive the bill group ID using the bill group identifier type and bill group identifier combination, the status of the record is changed to **Invalid**. In addition, if any of the above validations fail, the status of the record is changed to **Invalid**.

Note:

If the mandatory data is missing in any record of the file, the system will not allow you to create an upload request.

The system does not allow you to upload a file which exceeds 700 KB. Therefore, you must ensure that the file size is within the maximum limit.

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On clicking the **Validate** button, the system checks whether the upload request must be validated in the real time (i.e., immediately) or in the deferred mode (i.e., in the background). If the total number of records in the upload request does not exceed the online record validate limit, the system validates the following in the real time:

- The bill group (i.e., person) ID given in the record is valid.
- The parent customer's person type is set to **Parent Customer** in the system.
- The bill group identifier type is available when the bill group identifier is specified in the record and vice versa.
- The bill group is the child person of the parent customer.
- The bill group's person type is set to **Bill Group** in the system.
- The relationship between the bill group and parent customer is effective on the system date.
- The bill group is related to the parent customer using the relationship type that is specified in the **Person Relationship Type** option type of the **C1-ASOBLLNG** feature configuration.
- The source system exists in the extendable lookup that is specified in the **Source System Extendable Lookup** parameter of the **C1-BLVLVALID** algorithm.
- The bill group sort record with the bill group ID and sort ID combination already exists in the system.
- The effective date specified in the record is within the date range of the bill group sort record.
- A duplicate record with the source system, parameter 1, parameter 2, parameter 3, parameter 4, and effective date combination does not exist for the bill group in the C1_BILL_LVL table.
- The two or more records with the same source system, parameter 1, parameter 2, parameter 3, parameter 4, and effective date combination do not exist for the same bill group in the upload request.

Note:

If the bill group ID is invalid, the system derives the bill group ID using the respective bill group identifier type and bill group identifier combination. If the system could not derive the bill group ID using the bill group identifier type and bill group identifier combination, the status of the record is changed to **Invalid**.

If duplicate records exist in the upload request, the system validates and changes the status of one record to **Valid** and the status of the remaining records to **Invalid**.

If any of above validations fail, the status of the record is changed to **Invalid**. However, if all the above validations are successful, the status of the record is changed to **Valid**. Once all the pending records in the upload request are validated, the status of the upload request is changed to **Validated**.

However, if the total number of records in the upload request exceeds the online record validate limit, the system changes the status of the upload request to **Deferred Validation**. The system then validates the records and changes the status of the upload request from **Deferred Validation** to **Validated** when the **C1-UPLRQ** batch is executed.

On clicking the **Submit** button, the system checks whether the approval is required for the upload request. If the approval is required for the upload request, the status of the upload request is changed to **Approval In Progress**. However, if the approval is not required for the upload request, the status of the upload request is changed to **Submitted**.

The approver can either approve or reject the upload request based on the observations. On approving an upload request, the status of the upload request is changed to **Approved**. However, on rejecting an upload request, the status of the upload request is changed to **Rejected**.

Once the status of the upload request is changed to **Submitted** or **Approved**, the system checks whether the upload request must be processed in the real time (i.e., immediately) or in the deferred mode (i.e., in the background). If the number of valid records in the upload request does not exceed the online record process limit, the system changes the status of the upload request to **Processing**. However, if the number of valid records in the upload request exceeds the online record process limit, the system changes the status of the upload request to **Deferred Processing**. The system then changes the status of the upload request from **Deferred Processing** to **Processing** when the **C1-UPLRQ** batch is executed.

Once the status of the upload request is changed to **Processing**, the system fetches a list of records which are in the **Valid** status. For each valid record with a unique combination of the source system, parameter 1, parameter 2, parameter 3, parameter 4, and effective date, this algorithm creates one bill group derivation and pricing parameters record for the bill group ID and sort ID combination. The status of the bill group derivation and pricing parameters record is set to **Active**.

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Note: If the sort ID is not specified in the record and if the **Add Bill Group Sort** parameter of the **C1-BLVLVALID** algorithm is set to **Y**, then the system will first create the bill group sort record where the sort ID is set to the bill group ID and then create the derivation and pricing parameters for the bill group ID and sort ID combination. However, if the sort ID is not specified in the record and if the **Add Bill Group Sort** parameter of the **C1-BLVLVALID** algorithm is set to **N**, then the system will throw an appropriate error message.

Once the bill group derivation and pricing parameters record is successfully created, the status of the record is changed to **Processed**. However, if any error occurs while creating the bill group derivation and pricing parameters record, the status of the record is changed to **Error**. Finally, the status of the upload request is changed to **Processed**.

Note:

The system creates the bill group derivation and pricing parameters records using the entity business object specified in the respective upload request type.

This feature is tested and certified for the health insurance domain.

Prerequisites

To setup the mass bill group derivation and pricing parameters record creation feature, you need to do the following:

- Define the required upload request type where the upload request business object is set to **C1-BillLevelUploadRequest**.
- Create a To Do type named **C1-BGDVP** with the following specifications:
  - **Navigation Option** - c1upldrqTabMenu
  - **Sort Keys** - Define the following sort keys for the To Do type:

Sort Key	Use as Default	Sort Order
Upload Request ID	Yes	Descending

  - **Drill Keys** - Define the following drill keys for the To Do type:

Table Name	Field Name
C1_UPLOAD_REQ	Upload Request ID

- Assign the **C1-BGDVP** To Do type to a To Do role whose users must receive a To Do while submitting a bill group derivation and pricing parameters record creation upload request for approval.
- Define the required characteristic types where the characteristic entity is set to **Upload Request Type**.
- Define the required characteristic types where the characteristic entity is set to **Upload Request**.
- Define the required foreign key reference for bill group (i.e., person (if not available)) in the system.
- Define the status reasons for the **Canceled** and **Rejected** statuses of the **C1-BillLevelUploadRequest** business object in the **Status Reason** screen.
- Define the required person identifier types in the system.
- Define the required source systems in the **Source System (C1-SourceSystemLookup)** extendable lookup.
- Define the parameters in the **C1-BLVLVALID** algorithm attached to the lifecycle of the **C1-BillLevelUploadRequest** business object.
- Set the **Person Relationship Type** option type of the **C1-ASOBLLNG** feature configuration.
- Define the required bill group sort records in the system.
- Set the batch control type of the **Upload Request Periodic Monitor (C1-UPLRQ)** batch to **Timed** and define the following attributes:
  - Time Interval
  - Timer Active
  - User ID

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- Batch Language
- Email Address

For more information about this batch, see *Oracle Revenue Management and Billing Batch Guide*.

Related Topics

For more information on...	See...
How to setup the **C1-ASOBLLNG** feature configuration	Setting the C1-ASOBLLNG Feature Configuration on page 4417

Algorithms Used in C1-BillLevelUploadRequest

The following table lists the algorithms which are used in the lifecycle of the **C1-BillLevelUploadRequest** business object:

Status	System Event	Algorithm	Algorithm Type	Description
Draft	Enter	C1-BLVUPLDTL	C1-BLVUPLDTL	Refer to C1-BLVUPLDTL on page 2086.
	Enter	C1-BLVLDERIV	C1-BLVLDERIV	Refer to C1-BLVLDERIV on page 2086.
Validating	Enter	C1-DEFERVALD	C1-DEFERVALD	Refer to C1-DEFERVALD on page 2037.
Deferred Validation	Monitor	F1-AT-RQJ	F1-GEN-BOMNJ	Refer to F1-AT-RQJ on page 225.
Validated	Enter	C1-BLVLVALID	C1-BLVLVALID	Refer to C1-BLVLVALID on page 2087.
Canceled	-	-	-	-
Submitted	Enter	C1-UPLSUBENT	C1-UPLSUBENT	Refer to C1-UPLSUBENT on page 2023.
	Enter	C1-DEFERUPLD	C1-DEFERUPLD	Refer to C1-DEFERUPLD on page 2023.
	Monitor	F1-AT-RQJ	F1-GEN-BOMNJ	Refer to F1-AT-RQJ on page 225.
Approval In Progress	Enter	C1-UPLAPPENT	C1-UPLAPPENT	Refer to C1-UPLAPPENT on page 2024.
	Exit	C1-UPLAPPEXT	C1-UPLAPPEXT	Refer to C1-UPLAPPEXT on page 2024.
	Exit	F1-TODOCOMPL	F1-TODOCOMPL	Refer to F1-TODOCOMPL on page 1469.
Approved	Enter	C1-DEFERUPLD	C1-DEFERUPLD	Refer to C1-DEFERUPLD on page 2023.
	Monitor	F1-AT-RQJ	F1-GEN-BOMNJ	Refer to F1-AT-RQJ on page 225.
Rejected	-	-	-	-
Deferred Processing	Monitor	F1-AT-RQJ	F1-GEN-BOMNJ	Refer to F1-AT-RQJ on page 225.

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Status	System Event	Algorithm	Algorithm Type	Description
Processing	Enter	C1-BLVLVLPRO	C1-BLVLVLPRO	Refer to C1-BLVLVLPRO on page 2088.
	Monitor	F1-AT-RQJ	F1-GEN-BOMNJ	Refer to F1-AT-RQJ on page 225.
Processed	-	-	-	-

C1-BLVUPLDTL

This algorithm reads the data in the BO_DATA_AREA column of the C1_UPL_REQUEST table and accordingly inserts the records in the C1_UPLOAD_REQ_DTLS table. In addition, the status of each record in the C1_UPLOAD_REQ_DTLS table is set to **Pending**.

C1-BLVLDERIV

This algorithm validates the following:

- Either the bill group (i.e., person) ID or bill group (i.e., person) identifier type and bill group (i.e., person) identifier is specified in the record.
- Sort ID, source system, bill level 1 (i.e., parameter 1), and effective date are specified in the record.

If the bill group ID is not specified in the record, it derives the bill group ID using the respective bill group identifier type and bill group identifier combination. Once the bill group ID is derived, the corresponding record is updated in the C1_UPLOAD_REQ_DTLS table. If the system could not derive the bill group ID using the bill group identifier type and bill group identifier combination, the status of the record in the C1_UPLOAD_REQ_DTLS table is changed to **Invalid**. In addition, if any of the above validations fail, the status of the record in the C1_UPLOAD_REQ_DTLS table is changed to **Invalid**.

This algorithm also derives the fields which can be used as search filters based on the mapping defined in the respective upload request type.

C1-DEFERVALD

This algorithm is invoked when the user clicks the **Validate** button. It checks whether the upload request must be validated in the real time (i.e., immediately) or in the deferred mode (i.e., in the background). If the total number of records in the upload request does not exceed the online record validate limit, it changes the status of the upload request to **Validated**. However, if the total number of records in the upload request exceeds the online record validate limit, it changes the status of the upload request to **Deferred Validation**.

It contains the following parameter:

- **Online Record Validate Limit** - Used to indicate the maximum number of records you can validate in the real time (i.e., immediately). This parameter is mandatory.

F1-AT-RQJ

This algorithm transitions the current status of the business object to the specified status. It contains the following parameters:

- **Next Status** – Used when you want to override the default next status specified in the lifecycle.
- **Next Transition Condition** – Used when you want to override the default next transition condition specified in the lifecycle.

At a time, you can specify value for either the **Next Status** or **Next Transition Condition** parameter. If you don't specify any value for these parameters, the system will transition the business object to the default next status specified in its lifecycle.

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C1-BLVLVALID

This algorithm is invoked when the user clicks the **Validate** button. It validates the records which are in the **Pending** status. It validates the following:

- The bill group (i.e., person) ID given in the record is valid.

  Note: If the bill group ID is invalid, it derives the bill group ID using the respective bill group (i.e., person) identifier type and bill group (i.e., person) identifier combination. Once the bill group ID is derived, the corresponding record is updated in the C1_UPLOAD_REQ_DTLS table. If the system could not derive the bill group ID using the bill group identifier type and bill group identifier combination, the status of the record in the C1_UPLOAD_REQ_DTLS table is changed to **Invalid**.
- The parent customer's person type is set to **Parent Customer** in the system.
- The bill group identifier type is available when the bill group identifier is specified in the record and vice versa.
- The bill group is the child person of the parent customer.
- The bill group's person type is set to **Bill Group** in the system.
- The relationship between the bill group and parent customer is effective on the system date.
- The bill group is related to the parent customer using the relationship type that is specified in the **Person Relationship Type** option type of the **C1-ASOBLLNG** feature configuration.
- The source system exists in the extendable lookup that is specified in the **Source System Extendable Lookup** parameter.
- The bill group sort record with the bill group ID and sort ID combination already exists in the system.
- The effective date specified in the record is within the date range of the bill group sort record.
- A duplicate record with the source system, parameter 1, parameter 2, parameter 3, parameter 4, and effective date combination does not exist for the bill group in the C1_BILL_LVL table.
- The two or more records with the same source system, parameter 1, parameter 2, parameter 3, parameter 4, and effective date combination do not exist for the same bill group in the upload request.

  Note: If duplicate records exist in the upload request, it validates and changes the status of one record to **Valid** and the status of the remaining records to **Invalid**.

If any of above validations fail, the status of the record in the C1_UPLOAD_REQ_DTLS table is changed to **Invalid**. However, if all the above validations are successful, the status of the record in the C1_UPLOAD_REQ_DTLS table is changed to **Valid**. Once all the pending records in the upload request are validated, the status of the upload request is changed to **Validated**.

Note: If there are no pending records while validating an upload request, a message appears indicating that there are no records to be validated. In such case, you can only delete an upload request.

This algorithm contains the following parameters:

- **Source System Extendable Lookup** - Used to specify the source system extendable lookup business object. The system then validates whether the source system specified in the record is already defined using the specified extendable lookup business object. This parameter is mandatory.

  Note: The **C1-SourceSystemLookup** extendable lookup business object is shipped with the product.
- **Add Bill Group Sort** - Used to indicate whether the bill group sort record should be automatically created if the sort ID is not specified in the record. The valid values are:
  - **Y** - Used when you want to automatically create the bill group sort record if the sort ID is not specified in the record. In such case, the system will first create the bill group sort record where the sort ID is set to the bill group ID and then create the derivation and pricing parameters for the bill group ID and sort ID combination.
  - **N** - Used when you want the system to behave in the traditional manner (i.e., throw an error when the sort ID is not specified in the record).

  This parameter is optional.

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C1-UPLSUBENT

This algorithm is invoked when the user clicks the **Submit** button. It checks whether the approval is required for the upload request. If the approval is required for the upload request, the status of the upload request is changed to **Approval In Progress**. However, if the approval is not required for the upload request, the status of the upload request is changed to **Submitted**.

C1-DEFERUPLD

This algorithm is invoked when the status of the upload request is changed to **Submitted** or **Approved**. It checks whether the upload request must be processed in the real time (i.e., immediately) or in the deferred mode (i.e., in the background). If the number of valid records in the upload request does not exceed the online record process limit, it changes the status of the upload request to **Processing**. However, if the number of valid records in the upload request exceeds the online record process limit, it changes the status of the upload request to **Deferred Processing**.

It contains the following parameter:

- **Online Record Process Limit** - Used to indicate the maximum number of valid records you can process in the real time (i.e., immediately). This parameter is mandatory.

C1-UPLAPPENT

This algorithm is invoked when the status of the upload request is changed to **Approval In Progress**. It creates a To Do using the approval To Do type that is specified in the respective upload request type. Once a To Do is created, it is assigned to all the users with the approval To Do role that is specified in the respective upload request type. In addition, it creates a log entry for the upload request when the To Do is created for the approver.

C1-UPLAPPEXT

This algorithm is invoked when the user clicks the **Approve** or **Reject** button. It checks whether the approver is associated with the approval To Do role specified in the respective upload request type. If not, it does not allow the approver to approve or reject the upload request. In addition, it does not allow the submitter to approve or reject the upload request.

F1-TODOCOMPL

This algorithm completes the To Do entries that are linked to an object when the object exits the given status. It finds and completes all open To Do entries where the business object's primary key is defined as a drill key. However, if the **Exclude To Do Entries From Auto Completion** (**F1-EXLTD**) characteristic is set to **Y** for a To Do type, the system does not automatically complete the respective To Do entry.

This algorithm contains the following parameter:

- **'Do Not Complete To Do Type' Char Type** – Used to specify the characteristic type that indicates whether the To Do entries should be automatically completed or not.

> **Note:** The **F1-EXLTD** characteristic type is shipped with the product. You can either use the **F1-EXLTD** characteristic type or a custom characteristic type, if required. Note that you must specify a predefined characteristic type where the characteristic entity is set to **To Do Type** and the predefined values are set to **Y** or **N**.

C1-BLVLVLPRO

This algorithm is invoked when the status of the upload request is changed to **Processing**. It fetches a list of records which are in the **Valid** status. For each valid record with a unique combination of the source system, parameter 1, parameter 2, parameter 3, parameter 4, and effective date, this algorithm creates one bill group derivation and pricing parameters record for the bill group ID and sort ID combination. The status of the bill group derivation and pricing parameters record is set to **Active**.

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Note: The system creates the bill group derivation and pricing parameters records using the entity business object specified in the respective upload request type.

If the record is successfully processed, the status of the record is changed to **Processed**. However, if the record could not be processed successfully due to any reason, the status of the record is changed to **Error**. Finally, the status of the upload request is changed to **Processed**.

Mass Bill Group Derivation and Pricing Parameters Record Creation CSV Format

The following table lists and describes the columns that should be available in the CSV file while adding derivation and pricing parameters records for multiple bill groups at once through an upload request:

Sr. No.	Column Name	Description	Mandatory (Yes or No)
1	Source System	Used to indicate the source system from where the policy is originated. **Note:** You must specify a source system which is already defined in the extendable lookup that is specified in the **Source System Extendable Lookup** parameter of the **C1-BLVLVALID** algorithm.	Yes
2	Bill Group ID	Used to indicate the bill group (i.e., person) for whom you want to define the derivation and pricing parameters. **Note:** You must specify an effective child person of the parent customer for whom you are creating the mass bill group derivation and pricing parameters record creation upload request. In addition, note that you must specify a child person whose person type is set to **Bill Group** and who is related to the parent customer using the relationship type that is specified in the **Person Relationship Type** option type of the **C1-ASOBLLNG** feature configuration.	Yes (Conditional) **Note:** This data is required when the bill group (i.e., person) identifier type and bill group (i.e., person) identifier are not specified in the record.
3	Sort ID	Used to specify the sort ID of the bill group for which you want to define the derivation and pricing parameters.	Yes

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Sr. No.	Column Name	Description	Mandatory (Yes or No)
		Note: If the sort ID is not specified in the record and if the **Add Bill Group Sort** parameter of the **C1-BLVLVALID** algorithm is set to **Y**, then the system will first create the bill group sort record where the sort ID is set to the bill group ID and then create the derivation and pricing parameters for the bill group ID and sort ID combination. However, if the sort ID is not specified in the record and if the **Add Bill Group Sort** parameter of the **C1-BLVLVALID** algorithm is set to **N**, then the system will throw an appropriate error message. For more information, see C1-BLVLVALID on page 2087.	
4	Effective Date	Used to specify the date from when the derivation and pricing parameters are effective for the bill group and sort ID combination. **Note:** You must specify the date in the **YYYY-MM-DD** format. The effective date must be within the date range of the bill group sort record.	Yes
5	Bill Level 1 (i.e., Parameter 1)	Used to specify the employee attribute based on which you want to derive the bill group. **Note:** You must not specify the ampersand (&) character in the column value.	Yes
6	Bill Level 2 (i.e., Parameter 2)	Used to specify the employee attribute based on which you want to derive the bill group. **Note:** You must not specify the ampersand (&) character in the column value.	No
7	Bill Level 3 (i.e., Parameter 3)	Used to specify the employee attribute based on which you want to derive the bill group. **Note:** You must not specify the ampersand (&) character in the column value.	No
8	Bill Level 4 (i.e., Parameter 4)	Used to specify the employee attribute based on which you want to derive the bill group. **Note:** You must not specify the ampersand (&) character in the column value.	No
9	Bill Group Identifier Type	Used to specify the person identifier type.	Yes (Conditional)

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Sr. No.	Column Name	Description	Mandatory (Yes or No)
		Note: You must specify a person identifier type which is already defined in the system. You must specify the primary person identifier details of the respective person.	**Note:** This data is required when the bill group ID is not specified in the record.
10	Bill Group Identifier	Used to specify the person identifier.	Yes (Conditional)
		Note: The system derives the person using the given person identifier type and person identifier combination when the person ID is either not specified or is invalid in the record.	**Note:** This data is required when the bill group ID is not specified in the record.

Note:

The CSV file should contain the columns in the above mentioned sequence.

Before uploading the file, ensure that the column headers specified in the CSV file are mapped to the schema of the respective upload request business object through data mapping in the upload request type. Otherwise, erroneous results might occur. For more information, see Mapping Data and Configuring Filters for an Upload Request Type on page 1433.

Sample Mass Bill Group Derivation and Pricing Parameters Record Creation CSV File

```
Source System,Bill Level 1,Bill Level 2,Bill Level 3,Bill Level 4,Effective Date,Bill Group ID,Bill Group Identifier Type,Bill
SR01,12477778,12172500,72610000,4545,2025-01-25,5837506574,SSN,714-99-5455,999
SR01,12477655,12172500,,,2025-01-25,5837505464,,,100
```

Mass Billable Charge Creation (Fully Insured Group and Individual)

Oracle Revenue Management and Billing provides the ability to create multiple billable charges for the health insurance business at once through the **Upload Request** feature. You can create regular pass-through and SQI based billable charges through an upload request. To create a pass-through billable charge, you need to specify at least one pass-through charge line details. Similarly, to create an SQI based billable charge, you need to specify at least one SQI based charge details. The regular billable charges are then considered during regular billing cycle.

You can also create non-recurring (i.e., one-time) and recurring billable charges through an upload request. Note that you can only specify a bill period for a recurring billable charge. Therefore, by default, the recurring flag of the record is set to **BP** when the bill period is specified in the record. You can create these billable charges at the group membership or individual membership level or at the policy plan level. If the group membership details could not be derived from the record, the system enables you to create a billable charge at the policy plan level. The system derives the appropriate contract against which the billable charge should be created at the membership or policy plan level.

Note: At present, you can only create new billable charges and not update existing billable charges through the **Upload Request** feature.

The **C1-BillableChargeUploadFI** business object enables you to create an upload request for mass billable charge creation. You need to create an upload request type for the **C1-BillableChargeUploadFI** business object. You can then upload a mass billable charge creation file in the CSV format using the respective upload request type. The mass

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billable charge creation file should contain records with the following information – Contract or account details, start date, end date, description on bill, recurring details, pass-through charge line details or SQI based charge details, pricing information, and characteristic details. If the contract ID is not specified, the record should contain the following additional information:

- Subscriber Identifier Type, Subscriber Identifier, Membership Type, External Membership ID
- Source System, Policy Number, and Plan Number (only in case of the fully insured group business)
- Health Plan Code (only in case of the fully insured individual business)

For more information, see Mass Billable Charge Creation CSV Format (Fully Insured Group) and Mass Billable Charge Creation CSV Format (Fully Insured Individual).

Note:

You must specify either pass-through charge lines or SQI details in the record.

You can specify maximum 5 pass-through charge lines or SQIs in the record.

You can specify maximum 15 price item parameters in the record.

You can specify maximum 20 characteristics in the record.

On uploading a mass billable charge creation file, the system creates an upload request in the **Draft** status. The data records are created in the **Pending** status. The system validates the following for each record:

- Either the account ID or account identifier type and account identifier is specified in the record.
- Start and end dates are specified in the record.
- Price item is specified in the record.
- Either the contract ID or source system, policy number, and plan number is specified in the record for the fully insured group business.
- Either the contract ID or health plan code is specified in the record for the fully insured individual business.

If the account ID is not specified in the record, the system derives the account ID using the respective account identifier type and account identifier combination. If the system could not derive the account ID using the account identifier type and account identifier combination, the status of the record is changed to **Invalid**.

If the **Plan Based Contract Creation Eligibility** option type of the **C1-ASOBLLNG** feature configuration is not set to **Yes** and if the contract ID is not specified in the record, the system derives an active contract of the account for the coverage period using the contract type specified in the price item. However, if the **Plan Based Contract Creation Eligibility** option type of the **C1-ASOBLLNG** feature configuration is set to **Yes** and if the contract ID is not specified in the record, the system derives policy plan or health plan specific contract of the account for the coverage period depending on the information given in the record. Before deriving the contract for the fully insured group business, the system derives the policy plan ID using the source system, policy number, and plan number combination.

The system then derives the active contract for the policy plan using the contract type (associated with the price item), policy plan ID, and coverage period combination. However, in case of the fully insured individual business, the system derives the active contract for the health plan using the contract type (associated with the price item), health plan code, and coverage period combination. If the system could not derive the policy plan ID or contract ID, the status of the record is changed to **Invalid**. In addition, if any of the above validations fail, the status of the record is changed to **Invalid**.

The system then checks whether the characteristic type specified in the **Membership ID Characteristic for Billable Charge** option type of the **C1-ASOBLLNG** feature configuration is available in the record. If so, the system derives the membership ID from the specified characteristic in the record. However, if the required characteristic is not available in the record, this algorithm tries to derive the group or individual membership using either of the following combinations:

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

Note: The system does not allow you to upload a file which exceeds 700 KB. Therefore, you must ensure that the file size is within the maximum limit.

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On clicking the **Validate** button, the system checks whether the upload request must be validated in the real time (i.e., immediately) or in the deferred mode (i.e., in the background). If the total number of records in the upload request does not exceed the online record validate limit, the system validates the following in the real time:

- The account ID given in the record is valid.
- The contract ID given in the record is valid.
- The source system, policy number, and plan number given in the record are valid.
- The health plan code given in the record is valid.
- The membership ID or policy plan ID given in the record is valid.
- The policy plan number is unique for the given source system and policy number combination within the given date range.
- The external membership ID for the membership is unique across the system.
- The contract type specified in the price item belongs to the division of the account.
- The billable charge's start date is equal to or later than the contract start date and earlier than or equal to the contract end date.
- The billable charge's start date is equal to or earlier than the billable charge's end date.
- The billable charge's end date is equal to or later than the billable charge's start date.
- At least one pass-through charge line or SQ based charge details is specified in the record.
- The **Description on Bill**, **Amount**, and **Currency** are specified when the record contains pass-through charge line details.
- The **SQI** and **SQI Value** are specified when the record contains SQ based charge details.
- The distribution code is required when the **Memo Only** flag of the respective pass-through charge line is set to **N**.
- The distribution code is not specified when the **Memo Only** flag of the respective pass-through charge line is set to **Y**.
- The distribution code given in the record is valid.
- The currency code given in the record is valid.
- The amount matches the decimal positions of the respective currency.
- The SQI given in the record is valid.
- The same SQI is not repeated multiple times in the record.
- The contract ID given in the record is valid and is not in the **Canceled** status.
- If both the account ID and contract ID are given in the record, the contract belongs to the account.
- The charge type given in the record is valid.
- The price item given in the record is valid.
- The **Price Item Usage** flag of the price item is set to **Pricing and Billing**.
- The contract type considered for billing should match the contract type specified in the price item.
- If the **Use Calendar Billing** field in the contract type is not set to **Allow Advanced Billing**, then bill after date is not earlier than the contract start date.
- The bill period given in the record is valid.
- If the **Multi Price Parameter** option type of the **C1_PPARM_FLG** feature configuration is set to **TRUE**, then only the price item is given in the record.
- The price item parameters are not specified when the price item is not given in the record.
- The same price item parameter is not repeated multiple times in the record.
- The characteristic type given in the record is valid and its characteristic entity is set to **Billable Charge**.
- The adhoc characteristic values are validated as per the validations defined in the respective algorithm.
- The predefined characteristic value is already defined for the characteristic type.
- The foreign key reference characteristic value is valid.
- The mandatory parameter of the price item is included in the record when the billable charge start and end dates fall within the price item parameter date range.

  Note: If the billable charge start and end dates do not fall within the price item parameter date range, the billable charge can be created without the mandatory price item parameter.
- The adhoc, predefined, and reference price item parameter values are valid.
- The source entity of the price item parameter is set to **Transaction**.

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- Both the price item parameter and its value are given in the record.
- The price item parameter should be valid for the price item in the given date range.

Note:

If the account ID is invalid, the system derives the account ID using the respective account identifier type and account identifier combination. If the system could not derive the account ID using the account identifier type and account identifier combination, the status of the record is changed to **Invalid**.

If duplicate records exist in the upload request, the system validates and changes the status of one record to **Valid** and the status of the remaining records to **Invalid**.

If any of above validations fail, the status of the record is changed to **Invalid**. However, if all the above validations are successful, the status of the record is changed to **Valid**. Once all the pending records in the upload request are validated, the status of the upload request is changed to **Validated**.

However, if the total number of records in the upload request exceeds the online record validate limit, the system changes the status of the upload request to **Deferred Validation**. The system then validates the records and changes the status of the upload request from **Deferred Validation** to **Validated** when the **C1-UPLRQ** batch is executed.

On clicking the **Submit** button, the system checks whether the approval is required for the upload request. If the approval is required for the upload request, the status of the upload request is changed to **Approval In Progress**. However, if the approval is not required for the upload request, the status of the upload request is changed to **Submitted**.

The approver can either approve or reject the upload request based on the observations. On approving an upload request, the status of the upload request is changed to **Approved**. However, on rejecting an upload request, the status of the upload request is changed to **Rejected**.

Once the status of the upload request is changed to **Submitted** or **Approved**, the system checks whether the upload request must be processed in the real time (i.e., immediately) or in the deferred mode (i.e., in the background). If the number of valid records in the upload request does not exceed the online record process limit, the system changes the status of the upload request to **Processing**. However, if the number of valid records in the upload request exceeds the online record process limit, the system changes the status of the upload request to **Deferred Processing**. The system then changes the status of the upload request from **Deferred Processing** to **Processing** when the **C1-UPLRQ** batch is executed.

Once the status of the upload request is changed to **Processing**, the system fetches a list of records which are in the **Valid** status. For each valid record, the system checks whether the membership ID is available in the record. If so, the system creates a billable charge against the contract at the respective group or individual membership level. It then stamps the membership ID as a characteristic on the billable charge. While stamping the characteristic, the system considers the characteristic type specified in the **Membership ID Characteristic for Billable Charge** option type of the **C1-ASOBLLNG** feature configuration.

However, if the membership ID is not available in the record, the system checks whether the characteristic type specified in the **Plan Id Characteristic Type** option type of the **C1-ASOBLLNG** feature configuration is available in the record. If so, the system creates a billable charge against the contract at the respective policy plan level. It then stamps the policy plan ID as a characteristic on the billable charge. While stamping the characteristic, it considers the characteristic type specified in the **Plan Id Characteristic Type** option type of the **C1-ASOBLLNG** feature configuration.

If the characteristic type specified in the **Plan Id Characteristic Type** option type of the **C1-ASOBLLNG** feature configuration is not available in the record but if the contract ID is available in the record, the system creates a billable charge against the contract.

Finally, the status of the billable charge is set to **Billable**. Once the billable charge is successfully created, the status of the record is changed to **Processed**. However, if any error occurs while creating the billable charge, the status of the record is changed to **Error**. Finally, the status of the upload request is changed to **Processed**.

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Note:

The system creates the billable charge using the entity business object specified in the respective upload request type.

The adhoc billable charge creation is not supported through the **C1-BillableChargeUploadFI** business object.

You can only create billable charges and not cancel any billable charges through the **Upload Request** feature.

This feature is only tested and certified for the fully insured group and individual lines of health insurance business.

You can view the billable charges created at the membership level in the **Billable Charges** zone of the **Charges** tab on the **Membership** screen. Note that the billable charges created via an upload request will not have any billable charge timelines and pricing calculation details.

You can view the billable charges created at the policy plan level in the **Billable Charges** zone of the **Charges** tab on the **Policy Plan** screen.

Prerequisites

To setup the mass billable charge creation feature for the health insurance business, you need to do the following:

- Define the required upload request type where the upload request business object is set to **C1-BillableChargeUploadFI**.
- Assign the **C1-BCUR** To Do type to a To Do role whose users must receive a To Do while submitting a billable charge creation upload request for approval.
- Define the required characteristic types where the characteristic entity is set to **Upload Request Type**.
- Define the required characteristic types where the characteristic entity is set to **Upload Request**.
- Define the required foreign key reference for billable charge (if not available) in the system.
- Define the status reasons for the **Canceled** and **Rejected** statuses of the **C1-BillableChargeUploadFI** business object in the **Status Reason** screen.
- Define the required account identifier types, membership identifier types, charge types, bill periods, currencies, distribution codes, price items, and SQIs in the system.
- Define the required pricing parameters where the source entity is set to **Transaction**.
- Associate the required pricing parameters with the price items in the system.
- Define the pricing for the required price item and price item parameters combinations in the system.
- Define the required exchange rates in the system.
- Set the **Multi Price Parameter** option type of the **C1_PPARM_FLG** feature configuration is set to **TRUE**.
- Set the **Plan Based Contract Creation Eligibility**, **Membership ID Characteristic for Billable Charge**, and **Plan Id Characteristic Type** option types of the **C1-ASOBLLNG** feature configuration.
- Define the required source systems in the **Source System (C1-SourceSystemLookup)** extendable lookup (only in case of the fully insured group line of business).
- Define the required membership types in the **MEMBERSHIP_TYPE_FLG** lookup field.
- Define the required health plans in the system (only in case of the fully insured individual line of business).
- Define the required characteristic types where the characteristic entity is set to **Billable Charge**.
- Set the batch control type of the **Upload Request Periodic Monitor (C1-UPLRQ)** batch to **Timed** and define the following attributes:
  - Time Interval
  - Timer Active
  - User ID
  - Batch Language
  - Email Address

  For more information about this batch, see *Oracle Revenue Management and Billing Batch Guide*.

Related Topics

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For more information on...	See...
How to setup the **C1_PPARM_FLG** feature configuration	Setting the C1_PPARM_FLG Feature Configuration on page 4461
How to setup the **C1-ASOBLLNG** feature configuration	Setting the C1-ASOBLLNG Feature Configuration on page 4417

Algorithms Used in C1-BillableChargeUploadFI

The following table lists the algorithms which are used in the lifecycle of the **C1-BillableChargeUploadFI** business object:

Status	System Event	Algorithm	Algorithm Type	Description
Draft	Enter	C1-CRTUPLDTL	C1-CRTUPLDTL	Refer to C1-CRTUPLDTL on page 2071.
	Enter	C1-BC-FIDER	C1-BC-FIDER	Refer to C1-BC-FIDER on page 2097.
Validating	Enter	C1-DEFERVALD	C1-DEFERVALD	Refer to C1-DEFERVALD on page 2037.
Deferred Validation	Monitor	F1-AT-RQJ	F1-GEN-BOMNJ	Refer to F1-AT-RQJ on page 225.
Validated	Enter	C1-BCFI-VAL	C1-BCFI-VAL	Refer to C1-BCFI-VAL on page 2098.
Canceled	-	-	-	-
Submitted	Enter	C1-UPLSUBENT	C1-UPLSUBENT	Refer to C1-UPLSUBENT on page 2023.
	Enter	C1-DEFERUPLD	C1-DEFERUPLD	Refer to C1-DEFERUPLD on page 2023.
	Monitor	F1-AT-RQJ	F1-GEN-BOMNJ	Refer to F1-AT-RQJ on page 225.
Approval In Progress	Enter	C1-UPLAPPENT	C1-UPLAPPENT	Refer to C1-UPLAPPENT on page 2024.
	Exit	C1-UPLAPPEXT	C1-UPLAPPEXT	Refer to C1-UPLAPPEXT on page 2024.
	Exit	F1-TODOCOMPL	F1-TODOCOMPL	Refer to F1-TODOCOMPL on page 1469.
Approved	Enter	C1-DEFERUPLD	C1-DEFERUPLD	Refer to C1-DEFERUPLD on page 2023.
	Monitor	F1-AT-RQJ	F1-GEN-BOMNJ	Refer to F1-AT-RQJ on page 225.
Rejected	-	-	-	-
Deferred Processing	Monitor	F1-AT-RQJ	F1-GEN-BOMNJ	Refer to F1-AT-RQJ on page 225.
Processing	Enter	C1-BC-PROC	C1-BC-PROC	Refer to C1-BC-PROC on page 2100.
	Monitor	F1-AT-RQJ	F1-GEN-BOMNJ	Refer to F1-AT-RQJ on page 225.

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Status	System Event	Algorithm	Algorithm Type	Description
Processed	-	-	-	-

C1-CRTUPLDTL

This algorithm reads the data in the BO_DATA_AREA column of the C1_UPL_REQUEST table and accordingly inserts the records in the C1_UPLOAD_REQ_DTLS table. In addition, the status of each record in the C1_UPLOAD_REQ_DTLS table is set to **Pending**.

C1-BC-FIDER

This algorithm validates the following:

- Either the account ID or account identifier type and account identifier is specified in the record.
- Start and end dates are specified in the record.
- Price item is specified in the record.
- Either the contract ID or source system, policy number, and plan number is specified in the record for the fully insured group business.
- Either the contract ID or health plan code is specified in the record for the fully insured individual business.

If the account ID is not specified in the record, it derives the account ID using the respective account identifier type and account identifier combination. Once the account ID is derived, the corresponding record is updated in the C1_UPLOAD_REQ_DTLS table. If the system could not derive the account ID using the account identifier type and account identifier combination, the status of the record in the C1_UPLOAD_REQ_DTLS table is changed to **Invalid**.

If the **Plan Based Contract Creation Eligibility** option type of the **C1-ASOBLLNG** feature configuration is not set to **Yes** and if the contract ID is not specified in the record, the system derives an active contract of the account for the coverage period using the contract type specified in the price item. However, if the **Plan Based Contract Creation Eligibility** option type of the **C1-ASOBLLNG** feature configuration is set to **Yes** and if the contract ID is not specified in the record, the system derives policy plan or health plan specific contract of the account for the coverage period depending on the information given in the record. Before deriving the contract for the fully insured group business, the system derives the policy plan ID using the source system, policy number, and plan number combination. Once the policy plan is derived, the corresponding record is updated in the C1_UPLOAD_REQ_DTLS table.

This algorithm then derives the active contract for the policy plan using the contract type (associated with the price item), policy plan ID, and coverage period combination. However, in case of the fully insured individual business, the system derives the active contract for the health plan using the contract type (associated with the price item), health plan code, and coverage period combination. Once the contract ID is derived, the corresponding record is updated in the C1_UPLOAD_REQ_DTLS table. If the system could not derive the policy plan ID or contract ID, the status of the record in the C1_UPLOAD_REQ_DTLS table is changed to **Invalid**. In addition, if any of the above validations fail, the status of the record in the C1_UPLOAD_REQ_DTLS table is changed to **Invalid**.

This algorithm also checks whether the characteristic type specified in the **Membership ID Characteristic for Billable Charge** option type of the **C1-ASOBLLNG** feature configuration is available in the record. If so, the system derives the membership ID from the specified characteristic in the record. However, if the required characteristic is not available in the record, this algorithm tries to derive the group or individual membership using either of the following combinations:

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

Once the membership ID is derived, the corresponding record is updated in the C1_UPLOAD_REQ_DTLS table.

This algorithm sets the recurring flag to **BP** and the adhoc bill flag to **N** for each record in the upload request. It also derives the fields which can be used as search filters based on the mapping defined in the respective upload request type.

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C1-DEFERVALD

This algorithm is invoked when the user clicks the **Validate** button. It checks whether the upload request must be validated in the real time (i.e., immediately) or in the deferred mode (i.e., in the background). If the total number of records in the upload request does not exceed the online record validate limit, it changes the status of the upload request to **Validated**. However, if the total number of records in the upload request exceeds the online record validate limit, it changes the status of the upload request to **Deferred Validation**.

It contains the following parameter:

- **Online Record Validate Limit** - Used to indicate the maximum number of records you can validate in the real time (i.e., immediately). This parameter is mandatory.

F1-AT-RQJ

This algorithm transitions the current status of the business object to the specified status. It contains the following parameters:

- **Next Status** – Used when you want to override the default next status specified in the lifecycle.
- **Next Transition Condition** – Used when you want to override the default next transition condition specified in the lifecycle.

At a time, you can specify value for either the **Next Status** or **Next Transition Condition** parameter. If you don't specify any value for these parameters, the system will transition the business object to the default next status specified in its lifecycle.

C1-BCFI-VAL

This algorithm is invoked when the user clicks the **Validate** button. It validates the records which are in the **Pending** status. It validates the following:

- The account ID given in the record is valid.

  Note: If the account ID is invalid, it derives the account ID using the respective account identifier type and account identifier combination. Once the account ID is derived, the corresponding record is updated in the C1_UPLOAD_REQ_DTLS table. If the system could not derive the account ID using the account identifier type and account identifier combination, the status of the record in the C1_UPLOAD_REQ_DTLS table is changed to **Invalid**.
- The contract ID given in the record is valid.
- The source system, policy number, and plan number given in the record are valid.
- The health plan code given in the record is valid.
- The membership ID or policy plan ID given in the record is valid.
- The policy plan number is unique for the given source system and policy number combination within the given date range.
- The external membership ID for the membership is unique across the system.
- The contract type specified in the price item belongs to the division of the account.
- The billable charge's start date is equal to or later than the contract start date and earlier than or equal to the contract end date.
- The billable charge's start date is equal to or earlier than the billable charge's end date.
- The billable charge's end date is equal to or later than the billable charge's start date.
- At least one pass-through charge line or SQ based charge details is specified in the record.
- The **Description on Bill**, **Amount**, and **Currency** are specified when the record contains pass-through charge line details.
- The **SQI** and **SQI Value** are specified when the record contains SQ based charge details.
- The distribution code is required when the **Memo Only** flag of the respective pass-through charge line is set to **N**.
- The distribution code is not specified when the **Memo Only** flag of the respective pass-through charge line is set to **Y**.
- The distribution code given in the record is valid.
- The currency code given in the record is valid.

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- The amount matches the decimal positions of the respective currency.
- The SQI given in the record is valid.
- The same SQI is not repeated multiple times in the record.
- The contract ID given in the record is valid and is not in the **Canceled** status.
- If both the account ID and contract ID are given in the record, the contract belongs to the account.
- The charge type given in the record is valid.
- The price item given in the record is valid.
- The **Price Item Usage** flag of the price item is set to **Pricing and Billing**.
- The contract type considered for billing should match the contract type specified in the price item.
- If the **Use Calendar Billing** field in the contract type is not set to **Allow Advanced Billing**, then bill after date is not earlier than the contract start date.
- The bill period given in the record is valid.
- If the **Multi Price Parameter** option type of the **C1_PPARM_FLG** feature configuration is set to **TRUE**, then only the price item is given in the record.
- The price item parameters are not specified when the price item is not given in the record.
- The same price item parameter is not repeated multiple times in the record.
- The characteristic type given in the record is valid and its characteristic entity is set to **Billable Charge**.
- The adhoc characteristic values are validated as per the validations defined in the respective algorithm.
- The predefined characteristic value is already defined for the characteristic type.
- The foreign key reference characteristic value is valid.
- The mandatory parameter of the price item is included in the record when the billable charge start and end dates fall within the price item parameter date range.

  Note: If the billable charge start and end dates do not fall within the price item parameter date range, the billable charge can be created without the mandatory price item parameter.
- The adhoc, predefined, and reference price item parameter values are valid.
- The source entity of the price item parameter is set to **Transaction**.
- Both the price item parameter and its value are given in the record.
- The price item parameter should be valid for the price item in the given date range.

If any of above validations fail, the status of the record in the C1_UPLOAD_REQ_DTLS table is changed to **Invalid**. However, if all the above validations are successful, the status of the record in the C1_UPLOAD_REQ_DTLS table is changed to **Valid**. Once all the pending records in the upload request are validated, the status of the upload request is changed to **Validated**.

Note: If there are no pending records while validating an upload request, a message appears indicating that there are no records to be validated. In such case, you can only delete an upload request.

C1-UPLSUBENT

This algorithm is invoked when the user clicks the **Submit** button. It checks whether the approval is required for the upload request. If the approval is required for the upload request, the status of the upload request is changed to **Approval In Progress**. However, if the approval is not required for the upload request, the status of the upload request is changed to **Submitted**.

C1-DEFERUPLD

This algorithm is invoked when the status of the upload request is changed to **Submitted** or **Approved**. It checks whether the upload request must be processed in the real time (i.e., immediately) or in the deferred mode (i.e., in the background). If the number of valid records in the upload request does not exceed the online record process limit, it changes the status of the upload request to **Processing**. However, if the number of valid records in the upload request exceeds the online record process limit, it changes the status of the upload request to **Deferred Processing**.

It contains the following parameter:

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- **Online Record Process Limit** - Used to indicate the maximum number of valid records you can process in the real time (i.e., immediately). This parameter is mandatory.

C1-UPLAPPENT

This algorithm is invoked when the status of the upload request is changed to **Approval In Progress**. It creates a To Do using the approval To Do type that is specified in the respective upload request type. Once a To Do is created, it is assigned to all the users with the approval To Do role that is specified in the respective upload request type. In addition, it creates a log entry for the upload request when the To Do is created for the approver.

C1-UPLAPPEXT

This algorithm is invoked when the user clicks the **Approve** or **Reject** button. It checks whether the approver is associated with the approval To Do role specified in the respective upload request type. If not, it does not allow the approver to approve or reject the upload request. In addition, it does not allow the submitter to approve or reject the upload request.

F1-TODOCOMPL

This algorithm completes the To Do entries that are linked to an object when the object exits the given status. It finds and completes all open To Do entries where the business object's primary key is defined as a drill key. However, if the **Exclude To Do Entries From Auto Completion** (**F1-EXLTD**) characteristic is set to **Y** for a To Do type, the system does not automatically complete the respective To Do entry.

This algorithm contains the following parameter:

- **'Do Not Complete To Do Type' Char Type** – Used to specify the characteristic type that indicates whether the To Do entries should be automatically completed or not.

> **Note:** The **F1-EXLTD** characteristic type is shipped with the product. You can either use the **F1-EXLTD** characteristic type or a custom characteristic type, if required. Note that you must specify a predefined characteristic type where the characteristic entity is set to **To Do Type** and the predefined values are set to **Y** or **N**.

C1-BC-PROC

This algorithm is invoked when the status of the upload request is changed to **Processing**. It fetches a list of records which are in the **Valid** status.

This algorithm behaves differently when invoked from two different business objects - **C1-BillableChargeUploadRequest** and **C1-BillableChargeUploadFI**. It does the following when invoked from the respective business object:

- **C1-BillableChargeUploadRequest** - For each valid record, this algorithm creates a billable charge against the contract.
- **C1-BillableChargeUploadFI** - For each valid record, this algorithm checks whether the membership ID is available in the record. If so, it creates a billable charge against the contract at the respective group or individual membership level. It then stamps the membership ID as a characteristic on the billable charge. While stamping the characteristic, it considers the characteristic type specified in the **Membership ID Characteristic for Billable Charge** option type of the **C1-ASOBLLNG** feature configuration.

  However, if the membership ID is not available in the record, this algorithm checks whether the characteristic type specified in the **Plan Id Characteristic Type** option type of the **C1-ASOBLLNG** feature configuration is available in the record. If so, it creates a billable charge against the contract at the respective policy plan level. It then stamps the policy plan ID as a characteristic on the billable charge. While stamping the characteristic, it considers the characteristic type specified in the **Plan Id Characteristic Type** option type of the **C1-ASOBLLNG** feature configuration.

  If the characteristic type specified in the **Plan Id Characteristic Type** option type of the **C1-ASOBLLNG** feature configuration is not available in the record but if the contract ID is available in the record, the system creates a billable charge against the contract.

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Note: The system creates the billable charge using the entity business object specified in the respective upload request type.

Finally, the status of the billable charge is set to **Billable**. If the record is successfully processed, the status of the record is changed to **Processed**. However, if the record could not be processed successfully due to any reason, the status of the record is changed to **Error**. Finally, the status of the upload request is changed to **Processed**.

Mass Billable Charge Creation CSV Format (Fully Insured Group)

The following table lists and describes the columns that should be available in the CSV file while creating multiple billable charges for the fully insured group business at once through an upload request:

Sr. No.	Column Name	Description	Mandatory (Yes or No)
1	Account Identifier Type	Used to specify the account identifier type. **Note:** You must specify an account identifier type which is already defined in the system.	Yes (Conditional) **Note:** This data is required when the account ID and contract ID are not specified in the record.
2	Account Identifier	Used to specify the account identifier. **Note:** The system derives the account using the given account identifier type and account identifier combination when the account ID is either not specified or is invalid in the record.	Yes (Conditional) **Note:** This data is required when the account ID and contract ID are not specified in the record.
3	Account ID	Used to indicate the account for which you want to create the billable charge.	Yes (Conditional) **Note:** This data is required when the following conditions are met: • Account identifier type and account identifier are not specified in the record. • Contract ID is not specified in the record.
4	Source System	Used to indicate the external system from where the policy is originated.	Yes (Conditional)

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Sr. No.	Column Name	Description	Mandatory (Yes or No)
		Note: You must specify a source system which is already defined in the **Source System (C1-SourceSystemLookup)** extendable lookup. The system derives the policy plan ID using the source system, policy number, and plan number combination when the contract ID is not specified in the record. The policy plan ID is then used to derive the policy plan specific contract of the account.	**Note:** This data is required when the contract ID is not specified in the record.
5	Policy Number	Used to specify the policy number.	Yes (Conditional)
		Note: The system derives the policy plan ID using the source system, policy number, and plan number combination when the contract ID is not specified in the record. The policy plan ID is then used to derive the policy plan specific contract of the account.	**Note:** This data is required when the contract ID is not specified in the record.
6	Plan Number	Used to specify the policy plan number.	Yes (Conditional)
		Note: The system derives the policy plan ID using the source system, policy number, and plan number combination when the contract ID is not specified in the record. The policy plan ID is then used to derive the policy plan specific contract of the account.	**Note:** This data is required when the contract ID is not specified in the record.
7	Contract ID	Used to indicate the contract against which you want to create the billable charge.	Yes (Conditional) **Note:** This data is required when you want to create the billable charge against a specific contract of the account.
8	Start Date	Used to specify the start date of billable charge. **Note:** You must specify the date in the **YYYY-MM-DD** format. The start date cannot be later than the end date.	Yes
9	End Date	Used to specify the end date of billable charge. **Note:** You must specify the date in the **YYYY-MM-DD** format. The end date cannot be earlier than the start date.	Yes
10	Charge Type	Used to indicate the type of billable charge.	No

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Sr. No.	Column Name	Description	Mandatory (Yes or No)
		Note: You must specify a charge type which is already defined in the system.	
11	Description On Bill	Used to specify the summarized information about the charge that you want to print on the bill.	Yes
12	Bill Period	Used to indicate the bill period using which the system determines the intervals at which the recurring bill segments should be created for the billable charge. **Note:** You must specify a bill period which is already defined in the system. If the bill period is specified in the record, the system, by default, sets the recurring flag to **BP**.	No
13	Bill After	Used to specify the date after which the charge can be billed to the account. **Note:** You must specify the date in the **YYYY-MM-DD** format.	No
14	Description on Bill1, Description on Bill2, ..., Description on Bill5	Used to specify the description for the pass-through charge line. **Note:** You can specify maximum 5 pass-through charge lines in the record.	Yes (Conditional) **Note:** This data is required while creating a pass-through billable charge.
15	Amount1, Amount2, ..., Amount5	Used to specify the charge amount. **Note:** You must specify a number with decimal positions less than or equal to the decimal positions defined for the respective currency.	Yes (Conditional) **Note:** This data is required while creating a pass-through billable charge.
16	Currency1, Currency2, ..., Currency5	Used to specify the currency in which the amount is charged. **Note:** You must specify a currency which is already defined in the system. If you specify a currency other than the account's invoice currency, the system will do the currency conversion if the appropriate exchange rate is available in the system.	Yes (Conditional) **Note:** This data is required while creating a pass-through billable charge.
17	Show On Bill1, Show on Bill2, ..., Show On Bill5	Used to indicate whether the charge should appear on the person's printed bill. The valid values are: • Y • N	No

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Sr. No.	Column Name	Description	Mandatory (Yes or No)
		Note: If you do not specify this column value, by default, it is set to **Y**.	
18	Memo Only1, Memo Only2, ..., Memo Only5	Used to indicate whether the charge should not be included in the bill amount. The valid values are: • Y • N **Note:** If you do not specify this column value, by default, it is set to **N**.	No
19	Appears in Summary1, Appears in Summary2, ..., Appears in Summary5	Used to indicate whether the charge should be included in the summary line. The valid values are: • Y • N **Note:** If you do not specify this column value, by default, it is set to **N**.	No
20	Distribution Code1, Distribution Code2, ..., Distribution Code5	Used to specify the distribution code that indicates the GL account where the pass-through charge should be posted. **Note:** You must specify a distribution code which is already defined in the system.	Yes (Conditional) **Note:** This data is required when the memo only flag of the pass-through charge line is set to **N**.
49	Price Item	Used to indicate the price item for which you want to create the billable charge. **Note:** You must specify a price item which is already defined in the system.	Yes
50	Variance Parameter	Variance parameter (i.e., TOU) based pricing is deprecated and no longer supported in ORMB. Therefore, you should keep this column blank in the CSV file.	Not applicable
51	Price Item Parm Type1, Price Item Parm Type2, ...,	Used to indicate the price item parameter that you want to use along with the price item for determining the price item pricing.	Yes (Conditional)

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Sr. No.	Column Name	Description	Mandatory (Yes or No)
	Price Item Parm Type15	**Note:** This column value should not contain the **Equal To** (=) or **Tilde** (~) symbol. You must specify the mandatory parameters of the price item when the billable charge start and end dates fall within the respective price item parameter date range. You must specify a parameter which is associated with the price item in the given date range. You can specify maximum 15 price item parameters in the record.	**Note:** This data is required when the price item parameter value is specified in the record.
52	Price Item Parm Value1, Price Item Parm Value2, ..., Price Item Parm Value15	Used to specify the parameter value. **Note:** This column value should not contain the **Equal To** (=) or **Tilde** (~) symbol.	Yes (Conditional) **Note:** This data is required when the price item parameter is specified in the record.
81	SQI1, SQI2, ..., SQI5	Used to indicate the service quantity identifier (SQI) using which you want to calculate the price item charge. **Note:** You must specify an SQI which is already defined in the system. You can specify maximum 5 SQIs in the record.	Yes (Conditional) **Note:** This data is required while creating an SQI based billable charge.
82	SQI Value1, SQI Value2, ..., SQI Value5	Used to specify the service quantity for which you want to create the charge. **Note:** You can specify a number with a maximum precision 36 and maximum scale 18 (i.e., Number(36, 18)).	Yes (Conditional) **Note:** This data is required while creating an SQI based billable charge.
91	Subscriber Identifier Type	Used to specify the membership identifier type. **Note:** You must specify a membership identifier type which is already defined in the system.	Yes (Conditional) **Note:** This data is required when the characteristic type specified in the **Membership ID Characteristic for Billable Charge** option type of the **C1-ASOBLLNG** feature configuration is not available in the record.
92	Subscriber Identifier	Used to specify the membership identifier.	Yes (Conditional)

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Sr. No.	Column Name	Description	Mandatory (Yes or No)
		Note: Here, you must specify the main subscriber's identifier. The system then derives the group membership for which the billable charge should be created using either of the following combinations: • Subscriber Identifier Type and Subscriber Identifier • Membership Type, External Membership ID, Subscriber Identifier Type and Subscriber Identifier	**Note:** This data is required when the characteristic type specified in the **Membership ID Characteristic for Billable Charge** option type of the **C1-ASOBLLNG** feature configuration is not available in the record.
93	Membership Type	Used to indicate the type of membership. The valid values are: • **COBR** - Used when the group membership is a COBRA membership. • **MDCR** - Used when the group membership is a Medicare membership. • **RETR** - Used when the group membership is a retiree membership. **Note:** You must specify a membership type which is already defined in the **MEMBERSHIP_TYPE_FLG** lookup field. The membership type is used along with other membership details, such as External Membership ID, Subscriber Identifier Type and Subscriber Identifier to derive the group membership for which the billable charge should be created in the system.	No
94	External Membership ID	Used to specify the external membership ID. **Note:** Here, you need to specify the membership ID which is maintained in the external source system. If the subscriber identifier type, subscriber identifier, and membership type are not specified in the record but only the external membership ID is specified in the record, then you must ensure that the external membership ID is unique for the membership across the system.	No
95	Effective Date1, Effective Date2, ..., Effective Date20	Used to specify the date from when the characteristic is effective for the billable charge. **Note:** You must specify the date in the **YYYY-MM-DD** format.	Yes (Conditional) **Note:** This data is required when the characteristic type is specified in the record.

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Sr. No.	Column Name	Description	Mandatory (Yes or No)
96	Char Type1, Char Type2, ..., Char Type20	Used to specify the characteristic type. **Note:** You must specify a characteristic type where the characteristic entity is set to **Billable Charge**.	No
97	Char Val1, Char Val2, ..., Char Val20	Used to specify the value for the characteristic type.	Yes (Conditional) **Note:** This data is required when the characteristic type is specified in the record.

Note:

The CSV file should contain the columns in the above mentioned sequence. You can add five pass-through charge lines — each set containing Description on Bill, Amount, Currency, Show on Bill, Memo Only, Appears in Summary, and Distribution Code followed by the subsequent set (i.e., Description on Bill1, Amount1, Currency1, Show on Bill1, Memo Only1, Appears in Summary1, Distribution Code1, Description on Bill2, Amount2, Currency2, Show on Bill2, Memo Only2, Appears in Summary2, Distribution Code2, and so on). Similarly, you can add the following:

- 15 sets of pricing parameters — each set containing Price Item Parameter and Price Item Parameter Value followed by the subsequent set (i.e., Price Item Parameter1, Price Item Parameter Value1, Price Item Parameter2, Price Item Parameter Value2, and so on).
- 5 sets of SQ details — each set containing SQI and SQI Value followed by the subsequent set (i.e., SQI1, SQI Value1, SQI2, SQI Value2, and so on).
- 20 sets of characteristics — each set containing Effective Date, Char Type and Char Value followed by the subsequent set (i.e., Effective Date1, Char Type1, Char Val1, Effective Date2, Char Type2, Char Val2, and so on).

You must specify either pass-through charge lines or SQI details in the record.

Before uploading the file, ensure that the column headers specified in the CSV file are mapped to the schema of the respective upload request business object through data mapping in the upload request type. Otherwise, erroneous results might occur. For more information, see Mapping Data and Configuring Filters for an Upload Request Type on page 1433.

Sample Mass Billable Charge Creation CSV File (Fully Insured Group)

```
Account Identifier Type,Account Identifier,Account ID,Source System,Policy Number,Plan Number,Contract ID,Start Date,End Date,Charge Type,Description On
Bill,Bill Period,Bill After,Description On Bill1,Amount1,Currency1,Show On Bill1,Memo Only1,Appears in Summary1,Distribution Code1,Description On
Bill2,Amount2,Currency2,Show On Bill2,Memo Only2,Appears in Summary2,Distribution Code2,Description On Bill3,Amount3,Currency3,Show On Bill3,Memo
Only3,Appears in Summary3,Distribution Code3,Description On Bill4,Amount4,Currency4,Show On Bill4,Memo Only4,Appears in Summary4,Distribution
Code4,Description On Bill5,Amount5,Currency5,Show On Bill5,Memo Only5,Appears in Summary5,Distribution Code5,Price Item,Variance Parameter,Price Item Parm
Type1,Price Item Parm Value1,Price Item Parm Type2,Price Item Parm Value2,Price Item Parm Type3,Price Item Parm Value3,Price Item Parm Type4,Price Item
Parm Value4,Price Item Parm Type5,Price Item Parm Value5,Price Item Parm Type6,Price Item Parm Value6,Price Item Parm Type7,Price Item Parm Value7,Price
Item Parm Type8,Price Item Parm Value8,Price Item Parm Type9,Price Item Parm Value9,Price Item Parm Type10,Price Item Parm Value10,Price Item Parm
Type11,Price Item Parm Value11,Price Item Parm Type12,Price Item Parm Value12,Price Item Parm Type13,Price Item Parm Value13,Price Item Parm Type14,Price
Item Parm Value14,Price Item Parm Type15,Price Item Parm Value15,SQI1,SQI Value1,SQI2,SQI Value2,SQI3,SQI Value3,SQI4,SQI Value4,SQI5,SQI
Value5,Subscriber Identifier Type,Subscriber Identifier,Membership Type,External Membership ID,Effective Date1,Char Type1,Char Val1,Effective Date2,Char
Type2,Char Val2,Effective Date3,Char Type3,Char Val3,Effective Date4,Char Type4,Char Val4,Effective Date5,Char Type5,Char Val5,Effective Date6,Char
Type6,Char Val6,Effective Date7,Char Type7,Char Val7,Effective Date8,Char Type8,Char Val8,Effective Date9,Char Type9,Char Val9,Effective Date10,Char
Type10,Char Val10,Effective Date11,Char Type11,Char Val11,Effective Date12,Char Type12,Char Val12,Effective Date13,Char Type13,Char Val13,Effective
Date14,Char Type14,Char Val14,Effective Date15,Char Type15,Char Val15,Effective Date16,Char Type16,Char Val16,Effective Date17,Char Type17,Char
Val17,Effective Date18,Char Type18,Char Val18,Effective Date19,Char Type19,Char Val19,Effective Date20,Char Type20,Char Val20
ACCT_NM  ,Demo_Group_BG1_A1,,DGSSY1,Demo_Group_BG1_Policy,Demo_Group_BG1_Plan,,2025-07-01,2025-07-31,,Bill for the Month of Jul 2025,,,Demo Charge
1,100,USD,Y,N,Y,CASH,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,AGE,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,SSN,987-65-4320
,,,,,,,,,,,,,,,,,,,
```

Sr. No.	Column Name	Description	Mandatory (Yes or No)
1	Account Identifier Type	Used to specify the account identifier type. **Note:** You must specify an account identifier type which is already defined in the system.	Yes (Conditional) **Note:** This data is required when the account ID and contract ID are not specified in the record.
2	Account Identifier	Used to specify the account identifier. **Note:** The system derives the account using the given account identifier type and account identifier combination when the account ID is either not specified or is invalid in the record.	Yes (Conditional) **Note:** This data is required when the account ID and contract ID are not specified in the record.
3	Account ID	Used to indicate the account for which you want to create the billable charge.	Yes (Conditional) **Note:** This data is required when the following conditions are met: • Account identifier type and account identifier are not specified in the record. • Contract ID is not specified in the record.
4	Health Plan Code	Used to specify the health plan code. **Note:** You must specify a health plan code which is already defined in the system. If the contract ID is not specified in the record, the system derives the health plan specific contract of the account.	Yes (Conditional) **Note:** This data is required when the contract ID is not specified in the record.
5	Contract ID	Used to indicate the contract against which you want to create the billable charge.	Yes (Conditional) **Note:** This data is required when you want to create the billable charge against a specific contract of the account.
6	Start Date	Used to specify the start date of billable charge.	Yes

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Sr. No.	Column Name	Description	Mandatory (Yes or No)
		Note: You must specify the date in the **YYYY-MM-DD** format. The start date cannot be later than the end date.	
7	End Date	Used to specify the end date of billable charge. **Note:** You must specify the date in the **YYYY-MM-DD** format. The end date cannot be earlier than the start date.	Yes
8	Charge Type	Used to indicate the type of billable charge. **Note:** You must specify a charge type which is already defined in the system.	No
9	Description On Bill	Used to specify the summarized information about the charge that you want to print on the bill.	Yes
10	Bill Period	Used to indicate the bill period using which the system determines the intervals at which the recurring bill segments should be created for the billable charge. **Note:** You must specify a bill period which is already defined in the system. If the bill period is specified in the record, the system, by default, sets the recurring flag to **BP**.	No
11	Bill After	Used to specify the date after which the charge can be billed to the account. **Note:** You must specify the date in the **YYYY-MM-DD** format.	No
12	Description on Bill1, Description on Bill2, ..., Description on Bill5	Used to specify the description for the pass-through charge line. **Note:** You can specify maximum 5 pass-through charge lines in the record.	Yes (Conditional) **Note:** This data is required while creating a pass-through billable charge.
13	Amount1, Amount2, ..., Amount5	Used to specify the charge amount.	Yes (Conditional)

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Sr. No.	Column Name	Description	Mandatory (Yes or No)
		Note: You must specify a number with decimal positions less than or equal to the decimal positions defined for the respective currency.	**Note:** This data is required while creating a pass-through billable charge.
14	Currency1, Currency2, ..., Currency5	Used to specify the currency in which the amount is charged. **Note:** You must specify a currency which is already defined in the system. If you specify a currency other than the account's invoice currency, the system will do the currency conversion if the appropriate exchange rate is available in the system.	Yes (Conditional) **Note:** This data is required while creating a pass-through billable charge.
15	Show On Bill1, Show on Bill2, ..., Show On Bill5	Used to indicate whether the charge should appear on the person's printed bill. The valid values are: • Y • N **Note:** If you do not specify this column value, by default, it is set to **Y**.	No
16	Memo Only1, Memo Only2, ..., Memo Only5	Used to indicate whether the charge should not be included in the bill amount. The valid values are: • Y • N **Note:** If you do not specify this column value, by default, it is set to **N**.	No
17	Appears in Summary1, Appears in Summary2, ..., Appears in Summary5	Used to indicate whether the charge should be included in the summary line. The valid values are: • Y • N **Note:** If you do not specify this column value, by default, it is set to **N**.	No
18	Distribution Code1, Distribution Code2, ..., Distribution Code5	Used to specify the distribution code that indicates the GL account where the pass-through charge should be posted. **Note:** You must specify a distribution code which is already defined in the system.	Yes (Conditional) **Note:** This data is required when the memo only flag of the pass-through charge line is set to **N**.
47	Price Item	Used to indicate the price item for which you want to create the billable charge.	Yes

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Sr. No.	Column Name	Description	Mandatory (Yes or No)
		Note: You must specify a price item which is already defined in the system.	
48	Variance Parameter	Variance parameter (i.e., TOU) based pricing is deprecated and no longer supported in ORMB. Therefore, you should keep this column blank in the CSV file.	Not applicable
49	Price Item Parm Type1, Price Item Parm Type2, ..., Price Item Parm Type15	Used to indicate the price item parameter that you want to use along with the price item for determining the price item pricing. **Note:** This column value should not contain the **Equal To** (=) or **Tilde** (~) symbol. You must specify the mandatory parameters of the price item when the billable charge start and end dates fall within the respective price item parameter date range. You must specify a parameter which is associated with the price item in the given date range. You can specify maximum 15 price item parameters in the record.	Yes (Conditional) **Note:** This data is required when the price item parameter value is specified in the record.
50	Price Item Parm Value1, Price Item Parm Value2, ..., Price Item Parm Value15	Used to specify the parameter value. **Note:** This column value should not contain the **Equal To** (=) or **Tilde** (~) symbol.	Yes (Conditional) **Note:** This data is required when the price item parameter is specified in the record.
79	SQI1, SQI2, ..., SQI5	Used to indicate the service quantity identifier (SQI) using which you want to calculate the price item charge. **Note:** You must specify an SQI which is already defined in the system. You can specify maximum 5 SQIs in the record.	Yes (Conditional) **Note:** This data is required while creating an SQI based billable charge.
80	SQI Value1, SQI Value2, ..., SQI Value5	Used to specify the service quantity for which you want to create the charge. **Note:** You can specify a number with a maximum precision 36 and maximum scale 18 (i.e., Number(36, 18)).	Yes (Conditional) **Note:** This data is required while creating an SQI based billable charge.
89	Subscriber Identifier Type	Used to specify the membership identifier type.	Yes (Conditional)

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Sr. No.	Column Name	Description	Mandatory (Yes or No)
		Note: You must specify a membership identifier type which is already defined in the system.	**Note:** This data is required when the characteristic type specified in the **Membership ID Characteristic for Billable Charge** option type of the **C1-ASOBLLNG** feature configuration is not available in the record.
90	Subscriber Identifier	Used to specify the membership identifier.	Yes (Conditional)
		Note: Here, you must specify the main subscriber's identifier. The system then derives the individual membership for which the billable charge should be created using either of the following combinations: • Subscriber Identifier Type and Subscriber Identifier • Membership Type, External Membership ID, Subscriber Identifier Type and Subscriber Identifier	**Note:** This data is required when the characteristic type specified in the **Membership ID Characteristic for Billable Charge** option type of the **C1-ASOBLLNG** feature configuration is not available in the record.
91	Membership Type	Used to indicate the type of membership. The valid values are: • **COBR** - Used when the individual membership is a COBRA membership. • **MDCR** - Used when the individual membership is a Medicare membership. • **RETR** - Used when the individual membership is a retiree membership.	No
		Note: You must specify a membership type which is already defined in the **MEMBERSHIP_TYPE_FLG** lookup field. The membership type is used along with other membership details, such as External Membership ID, Subscriber Identifier Type and Subscriber Identifier to derive the individual membership for which the billable charge should be created in the system.	
92	External Membership ID	Used to specify the external membership ID.	No

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Sr. No.	Column Name	Description	Mandatory (Yes or No)
		Note: Here, you need to specify the membership ID which is maintained in the external source system. If the subscriber identifier type, subscriber identifier, and membership type are not specified in the record but only the external membership ID is specified in the record, then you must ensure that the external membership ID is unique for the membership across the system.	
93	Effective Date1, Effective Date2, ..., Effective Date20	Used to specify the date from when the characteristic is effective for the billable charge. **Note:** You must specify the date in the **YYYY-MM-DD** format.	Yes (Conditional) **Note:** This data is required when the characteristic type is specified in the record.
94	Char Type1, Char Type2, ..., Char Type20	Used to specify the characteristic type. **Note:** You must specify a characteristic type where the characteristic entity is set to **Billable Charge**.	No
95	Char Val1, Char Val2, ..., Char Val20	Used to specify the value for the characteristic type.	Yes (Conditional) **Note:** This data is required when the characteristic type is specified in the record.

Note:

The CSV file should contain the columns in the above mentioned sequence. You can add five pass-through charge lines — each set containing Description on Bill, Amount, Currency, Show on Bill, Memo Only, Appears in Summary, and Distribution Code followed by the subsequent set (i.e., Description on Bill1, Amount1, Currency1, Show on Bill1, Memo Only1, Appears in Summary1, Distribution Code1, Description on Bill2, Amount2, Currency2, Show on Bill2, Memo Only2, Appears in Summary2, Distribution Code2, and so on). Similarly, you can add the following:

- 15 sets of pricing parameters — each set containing Price Item Parameter and Price Item Parameter Value followed by the subsequent set (i.e., Price Item Parameter1, Price Item Parameter Value1, Price Item Parameter2, Price Item Parameter Value2, and so on).
- 5 sets of SQ details — each set containing SQI and SQI Value followed by the subsequent set (i.e., SQI1, SQI Value1, SQI2, SQI Value2, and so on).
- 20 sets of characteristics — each set containing Effective Date, Char Type and Char Value followed by the subsequent set (i.e., Effective Date1, Char Type1, Char Val1, Effective Date2, Char Type2, Char Val2, and so on).

You must specify either pass-through charge lines or SQI details in the record.

Before uploading the file, ensure that the column headers specified in the CSV file are mapped to the schema of the respective upload request business object through data mapping in the upload request type. Otherwise, erroneous results might occur. For more information, see Mapping Data and Configuring Filters for an Upload Request Type on page 1433.

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Sample Mass Billable Charge Creation CSV File (Fully Insured Individual)

```
Account Identifier Type,Account Identifier,Account ID,Health Plan Code,Contract ID,Start Date,End Date,Charge Type,Description On Bill,Bill Period,Bill
After,Description On Bill1,Amount1,Currency1,Show On Bill1,Memo Only1,Appears in Summary1,Distribution Code1,Description On Bill2,Amount2,Currency2,Show
On Bill2,Memo Only2,Appears in Summary2,Distribution Code2,Description On Bill3,Amount3,Currency3,Show On Bill3,Memo Only3,Appears in
Summary3,Distribution Code3,Description On Bill4,Amount4,Currency4,Show On Bill4,Memo Only4,Appears in Summary4,Distribution Code4,Description On
Bill5,Amount5,Currency5,Show On Bill5,Memo Only5,Appears in Summary5,Distribution Code5,Price Item,Variance Parameter,Price Item Parm Type1,Price Item
Parm Value1,Price Item Parm Type2,Price Item Parm Value2,Price Item Parm Type3,Price Item Parm Value3,Price Item Parm Type4,Price Item Parm Value4,Price
Item Parm Type5,Price Item Parm Value5,Price Item Parm Type6,Price Item Parm Value6,Price Item Parm Type7,Price Item Parm Value7,Price Item Parm
Type8,Price Item Parm Value8,Price Item Parm Type9,Price Item Parm Value9,Price Item Parm Type10,Price Item Parm Value10,Price Item Parm Type11,Price Item
Parm Value11,Price Item Parm Type12,Price Item Parm Value12,Price Item Parm Type13,Price Item Parm Value13,Price Item Parm Type14,Price Item Parm
Value14,Price Item Parm Type15,Price Item Parm Value15,SQI1,SQI Value1,SQI2,SQI Value2,SQI3,SQI Value3,SQI4,SQI Value4,SQI5,SQI Value5,Subscriber
Identifier Type,Subscriber Identifier,Membership Type,External Membership ID,Effective Date1,Char Type1,Char Val1,Effective Date2,Char Type2,Char
Val2,Effective Date3,Char Type3,Char Val3,Effective Date4,Char Type4,Char Val4,Effective Date5,Char Type5,Char Val5,Effective Date6,Char Type6,Char
Val6,Effective Date7,Char Type7,Char Val7,Effective Date8,Char Type8,Char Val8,Effective Date9,Char Type9,Char Val9,Effective Date10,Char Type10,Char
Val10,Effective Date11,Char Type11,Char Val11,Effective Date12,Char Type12,Char Val12,Effective Date13,Char Type13,Char Val13,Effective Date14,Char
Type14,Char Val14,Effective Date15,Char Type15,Char Val15,Effective Date16,Char Type16,Char Val16,Effective Date17,Char Type17,Char Val17,Effective
Date18,Char Type18,Char Val18,Effective Date19,Char Type19,Char Val19,Effective Date20,Char Type20,Char Val20
ACCT_NM  ,Demo_Individual_A1,,Demo_INDV_HP_MP1,,2025-07-01,2025-07-31,,Bill for the Month of Jul 2025,,,Demo Charge
1,120,USD,Y,N,Y,CASH,,,
```

- The derived payment event ID is valid.
- The derived payment event does not have multiple payment tenders associated with it.
- The payment cancel reason given in the record is valid.
- The payment tender is not in the **Canceled** status.
- Any payment of the payment event is not in the **Incomplete**, **Freezable**, **Error**, or **Canceled** status.
- Any payment of the payment event is either not partially or fully refunded to the customer.
- The bank code given in the record is valid.
- The bank account is defined for the respective bank code in the system.
- The bank code is available when the bank account is specified in the record and vice versa.

If any of above validations fail, the status of the record is changed to **Invalid**. However, if all the above validations are successful, the status of the record is changed to **Valid**. Once all the pending records in the upload request are validated, the status of the upload request is changed to **Validated**.

However, if the total number of records in the upload request exceeds the online record validate limit, the system changes the status of the upload request to **Deferred Validation**. The system then validates the records and changes the status of the upload request from **Deferred Validation** to **Validated** when the **C1-UPLRQ** batch is executed.

On clicking the **Submit** button, the system checks whether the approval is required for the upload request. If the approval is required for the upload request, the status of the upload request is changed to **Approval In Progress**. However, if the approval is not required for the upload request, the status of the upload request is changed to **Submitted**.

The approver can either approve or reject the upload request based on the observations. On approving an upload request, the status of the upload request is changed to **Approved**. However, on rejecting an upload request, the status of the upload request is changed to **Rejected**.

Once the status of the upload request is changed to **Submitted** or **Approved**, the system checks whether the upload request must be processed in the real time (i.e., immediately) or in the deferred mode (i.e., in the background). If the number of valid records in the upload request does not exceed the online record process limit, the system changes the status of the upload request to **Processing**. However, if the number of valid records in the upload request exceeds the online record process limit, the system changes the status of the upload request to **Deferred Processing**. The system then changes the status of the upload request from **Deferred Processing** to **Processing** when the **C1-UPLRQ** batch is executed.

Once the status of the upload request is changed to **Processing**, the system fetches a list of records which are in the **Valid** status. For each valid record, the system cancels the payment tender and all the payments of the associated payment event. It changes the status of the payment tender and its associated payments to **Canceled**. While canceling a payment tender, it requires the cancel reason that indicates the reason why the payment tender and its associated payments are canceled. In addition, the system stamps the characteristics given in the record on the respective payment tender after canceling it.

Once the payment tender and its associated payments are successfully canceled, the status of the record is changed to **Processed**. However, if any error occurs while canceling the payment tender and its associated payments, the status of the record is changed to **Error**. Finally, the status of the upload request is changed to **Processed**.

Note: This feature is tested and certified for both the financial services and health insurance domains.

Prerequisites

To setup the mass payment tender cancellation feature, you need to do the following:

- Define the required upload request type where the upload request business object is set to **C1-TndrCnclUploadRequest**.
- Assign the **C1-TNDCL** To Do type to a To Do role whose users must receive a To Do while submitting a payment tender cancellation upload request for approval.
- Define the required characteristic types where the characteristic entity is set to **Upload Request Type**.
- Define the required characteristic types where the characteristic entity is set to **Upload Request**.

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- Define the required foreign key reference for payment event (if not available) in the system.
- Define the status reasons for the **Canceled** and **Rejected** statuses of the **C1-TndrCnclUploadRequest** business object in the **Status Reason** screen.
- Define the required tender types, payment cancel reasons, bank codes, and bank accounts in the system.
- Define the required characteristic types where the characteristic entity is set to **Payment Tender**.
- Set the batch control type of the **Upload Request Periodic Monitor (C1-UPLRQ)** batch to **Timed** and define the following attributes:
  - Time Interval
  - Timer Active
  - User ID
  - Batch Language
  - Email Address

  For more information about this batch, see *Oracle Revenue Management and Billing Batch Guide*.

Algorithms Used in C1-TndrCnclUploadRequest

The following table lists the algorithms which are used in the lifecycle of the **C1-TndrCnclUploadRequest** business object:

Status	System Event	Algorithm	Algorithm Type	Description
Draft	Enter	C1-TND-DERIV	C1-TND-DERIV	Refer to C1-TND-DERIV.
Validating	Enter	C1-DEFERVALD	C1-DEFERVALD	Refer to C1-DEFERVALD.
Deferred Validation	Monitor	F1-AT-RQJ	F1-GEN-BOMNJ	Refer toF1-AT-RQJ on page 225.
Validated	Enter	C1-TND-VALID	C1-TND-VALID	Refer to C1-TND-VALID.
Canceled	-	-	-	-
Submitted	Enter	C1-UPLSUBENT	C1-UPLSUBENT	Refer to C1-UPLSUBENT.
	Enter	C1-DEFERUPLD	C1-DEFERUPLD	Refer to C1-DEFERUPLD.
	Monitor	F1-AT-RQJ	F1-GEN-BOMNJ	Refer toF1-AT-RQJ on page 225.
Approval In Progress	Enter	C1-UPLAPPENT	C1-UPLAPPENT	Refer to C1-UPLAPPENT.
	Exit	C1-UPLAPPEXT	C1-UPLAPPEXT	Refer to C1-UPLAPPEXT.
	Exit	F1-TODOCOMPL	F1-TODOCOMPL	Refer toF1-TODOCOMPL on page 1469.
Approved	Enter	C1-DEFERUPLD	C1-DEFERUPLD	Refer to C1-DEFERUPLD.
	Monitor	F1-AT-RQJ	F1-GEN-BOMNJ	Refer toF1-AT-RQJ on page 225.
Rejected	-	-	-	-
Deferred Processing	Monitor	F1-AT-RQJ	F1-GEN-BOMNJ	Refer toF1-AT-RQJ on page 225.
Processing	Enter	C1-TND-PROC	C1-TND-PROC	Refer to C1-TND-PROC .
	Monitor	F1-AT-RQJ	F1-GEN-BOMNJ	Refer to F1-AT-RQJ on page 225.
Processed	-	-	-	-

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C1-TND-DERIV

This algorithm reads the data in the BO_DATA_AREA column of the C1_UPL_REQUEST table and accordingly inserts the records in the C1_UPLOAD_REQ_DTLS table. In addition, the status of each record in the C1_UPLOAD_REQ_DTLS table is set to **Pending**.

It validates the following:

- Either the external reference ID or check number is specified in the record.
- Cancel reason is specified in the record.

It then derives the payment tender using the external reference ID or check number and the payment event associated with the respective payment tender. It also considers additional filters, such as external source ID, tender type, and/or tender amount, if any, given in the record while deriving the payment tender. Note that if both the external reference ID and check number are given in the record, the system considers only external reference ID and not check number while deriving the payment tender.

Once the payment tender and payment event are derived, the corresponding record is updated in the C1_UPLOAD_REQ_DTLS table. If the system could not derive the payment tender and payment event, the status of the record in the C1_UPLOAD_REQ_DTLS table is changed to **Invalid**. In addition, if any of the above validations fail, the status of the record in the C1_UPLOAD_REQ_DTLS table is changed to **Invalid**.

This algorithm also derives the fields which can be used as search filters based on the mapping defined in the respective upload request type.

C1-DEFERVALD

This algorithm is invoked when the user clicks the **Validate** button. It checks whether the upload request must be validated in the real time (i.e., immediately) or in the deferred mode (i.e., in the background). If the total number of records in the upload request does not exceed the online record validate limit, it changes the status of the upload request to **Validated**. However, if the total number of records in the upload request exceeds the online record validate limit, it changes the status of the upload request to **Deferred Validation**.

It contains the following parameter:

- **Online Record Validate Limit** - Used to indicate the maximum number of records you can validate in the real time (i.e., immediately). This parameter is mandatory.

F1-AT-RQJ

This algorithm transitions the current status of the business object to the specified status. It contains the following parameters:

- **Next Status** – Used when you want to override the default next status specified in the lifecycle.
- **Next Transition Condition** – Used when you want to override the default next transition condition specified in the lifecycle.

At a time, you can specify value for either the **Next Status** or **Next Transition Condition** parameter. If you don't specify any value for these parameters, the system will transition the business object to the default next status specified in its lifecycle.

C1-TND-VALID

This algorithm is invoked when the user clicks the **Validate** button. It validates the records which are in the **Pending** status. It validates the following:

- The derived payment event ID is valid.
- The derived payment event does not have multiple payment tenders associated with it.
- The payment cancel reason given in the record is valid.
- The payment tender is not in the **Canceled** status.
- Any payment of the payment event is not in the **Incomplete**, **Freezable**, **Error**, or **Canceled** status.

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- Any payment of the payment event is either not partially or fully refunded to the customer.
- The bank code given in the record is valid.
- The bank account is defined for the respective bank code in the system.
- The bank code is available when the bank account is specified in the record and vice versa.

If any of above validations fail, the status of the record in the C1_UPLOAD_REQ_DTLS table is changed to **Invalid**. However, if all the above validations are successful, the status of the record in the C1_UPLOAD_REQ_DTLS table is changed to **Valid**. Once all the pending records in the upload request are validated, the status of the upload request is changed to **Validated**.

Note: If there are no pending records while validating an upload request, a message appears indicating that there are no records to be validated. In such case, you can only delete an upload request.

C1-UPLSUBENT

This algorithm is invoked when the user clicks the **Submit** button. It checks whether the approval is required for the upload request. If the approval is required for the upload request, the status of the upload request is changed to **Approval In Progress**. However, if the approval is not required for the upload request, the status of the upload request is changed to **Submitted**.

C1-DEFERUPLD

This algorithm is invoked when the status of the upload request is changed to **Submitted** or **Approved**. It checks whether the upload request must be processed in the real time (i.e., immediately) or in the deferred mode (i.e., in the background). If the number of valid records in the upload request does not exceed the online record process limit, it changes the status of the upload request to **Processing**. However, if the number of valid records in the upload request exceeds the online record process limit, it changes the status of the upload request to **Deferred Processing**.

It contains the following parameter:

- **Online Record Process Limit** - Used to indicate the maximum number of valid records you can process in the real time (i.e., immediately). This parameter is mandatory.

C1-UPLAPPENT

This algorithm is invoked when the status of the upload request is changed to **Approval In Progress**. It creates a To Do using the approval To Do type that is specified in the respective upload request type. Once a To Do is created, it is assigned to all the users with the approval To Do role that is specified in the respective upload request type. In addition, it creates a log entry for the upload request when the To Do is created for the approver.

C1-UPLAPPEXT

This algorithm is invoked when the user clicks the **Approve** or **Reject** button. It checks whether the approver is associated with the approval To Do role specified in the respective upload request type. If not, it does not allow the approver to approve or reject the upload request. In addition, it does not allow the submitter to approve or reject the upload request.

F1-TODOCOMPL

This algorithm completes the To Do entries that are linked to an object when the object exits the given status. It finds and completes all open To Do entries where the business object's primary key is defined as a drill key. However, if the **Exclude To Do Entries From Auto Completion** (**F1-EXLTD**) characteristic is set to **Y** for a To Do type, the system does not automatically complete the respective To Do entry.

This algorithm contains the following parameter:

- **'Do Not Complete To Do Type' Char Type** – Used to specify the characteristic type that indicates whether the To Do entries should be automatically completed or not.

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Note: The **F1-EXLTD** characteristic type is shipped with the product. You can either use the **F1-EXLTD** characteristic type or a custom characteristic type, if required. Note that you must specify a predefined characteristic type where the characteristic entity is set to **To Do Type** and the predefined values are set to **Y** or **N**.

C1-TND-PROC

This algorithm is invoked when the status of the upload request is changed to **Processing**. It fetches a list of records which are in the **Valid** status. For each valid record, this algorithm cancels the payment tender and all the payments of the associated payment event. It changes the status of the payment tender and its associated payments to **Canceled**. While canceling a payment tender, it requires the cancel reason that indicates the reason why the payment tender and its associated payments are canceled. In addition, this algorithm stamps the characteristics given in the record on the respective payment tender after canceling it.

If the record is successfully processed, the status of the record is changed to **Processed**. However, if the record could not be processed successfully due to any reason, the status of the record is changed to **Error**. Finally, the status of the upload request is changed to **Processed**.

Mass Payment Tender Cancellation CSV Format

The following table lists and describes the columns that should be available in the CSV file while canceling multiple payment tenders at once through an upload request:

Sr. No.	Column Name	Column Description	Mandatory (Yes or No)
1	External Source ID	Used to indicate the external system from where the payment tenders are received.	No
2	External Reference ID	Used to specify the payment external reference ID. It is used to track payment transaction across multiple systems.	Yes (Conditional) **Note:** This data is required when the check number is not specified in the record.
3	Check Number	Used to specify the check number if the payment is received through a check.	Yes (Conditional) **Note:** This data is required when the external reference ID is not specified in the record.
4	Tender Type	Used to indicate the type of tender through which the payment is received. **Note:** You must specify a tender type which is already defined in the system.	No
5	Tender Amount	Used to specify the tender amount. **Note:** You must specify a number which is greater than 0. You must specify a number with decimal positions less than or equal to the decimal positions defined for the respective currency.	No

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Sr. No.	Column Name	Column Description	Mandatory (Yes or No)
6	Cancel Reason	Used to indicate the reason why you want to cancel the payment tender and its associated payments. **Note:** You must specify a payment cancel reason which is already defined in the system.	Yes
7	Bank Code	Used to indicate the bank code where the payment tender source's money will be deposited. It indicates the distribution code used to build the GL details for the payment. **Note:** You must specify a bank code which is already defined in the system. If you specify the bank code, the system will override the bank code of the tender control.	Yes (Conditional) **Note:** This data is required when the bank account is specified in the record.
8	Bank Account	Used to specify the bank account through which payment tender is received. **Note:** You must specify a bank account which is already defined for the given bank code. If you specify the bank account, the system will override the existing bank account of the tender control.	Yes (Conditional) **Note:** This data is required when the bank code is specified in the record.
9	Char Type1, Char Type2, ..., Char Type5	Used to specify the characteristic type. **Note:** You must specify a characteristic type where the characteristic entity is set to **Payment Tender**. You can specify maximum 5 characteristics in the record.	No
10	Char Val1, Char Val2, .., Char Val5	Used to specify the value for the characteristic type.	Yes (Conditional) **Note:** This data is required when the characteristic type is specified in the record.

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Note:

The CSV file should contain the columns in the above mentioned sequence. You can add five sets of characteristics — each set containing Char Type and Char Val followed by the subsequent set (i.e., Char Type 1, Char Val1, Char Type 2, Char Val2, Char Type 3, Char Val3, Char Type 4, Char Val4, Char Type 5, Char Val5).

Before uploading the file, ensure that the column headers specified in the CSV file are mapped to the schema of the respective upload request business object through data mapping in the upload request type. Otherwise, erroneous results might occur. For more information, see Mapping Data and Configuring Filters for an Upload Request Type on page 1433.

Sample Mass Payment Tender Cancellation CSV File

```
External Source ID,External Reference ID,Check Number,Tender Type,Tender Amount,Cancel Reason,Bank Code,Bank Account,Char Type1,Char Val1,Char Type2,Char
Val2,Char Type3,Char Val3,Char Type4,Char Val4,Char Type5,Char Val5
,12345681,,,INSF,,,,,,,,,,
,,12345683,,,INSF,,,,,,,,,,
CASH-01,12345682,,,,INSF,,,,,,,,,,
,,12345686,CHECK,20,INSF,,,,,,,,,,
,12345688,,,,INSF,BOA,125666578,,,,,,,,,
,,12345689,CHECK,,INSF,,,,,,,,,,
```

Mass Bill Cycle Rule Characteristic Creation or Modification

Oracle Revenue Management and Billing enables you to create or update bill cycle rule characteristic of multiple accounts at once through the **Upload Request** feature. The **C1-BillCycleRuleCharUpdUplReq** business object enables you to create an upload request for mass bill cycle rule characteristic creation or modification.

You need to create an upload request type for the **C1-BillCycleRuleCharUpdUplReq** business object. You can then upload a mass bill cycle rule characteristic creation or modification file in the CSV format using the respective upload request type. The mass bill cycle rule characteristic creation or modification file should contain records with the following information – account identifier details or account ID and characteristic value with its effective date. For more information, see Mass Bill Cycle Rule Characteristic Creation or Modification CSV Format.

On uploading a mass bill cycle rule characteristic creation or modification file, the system creates an upload request in the **Draft** status. The data records are created in the **Pending** status. The system validates the following for each record:

- Either the account ID or account identifier type and account identifier is specified in the record.
- Effective date and bill cycle rule code is specified in the record.

If the account ID is not specified in the record, the system derives the account ID using the respective account identifier type and account identifier combination. If the system could not derive the account ID using the account identifier type and account identifier combination, the status of the record is changed to **Invalid**. In addition, if any of the above validations fail, the status of the record is changed to **Invalid**.

Note: The system does not allow you to upload a file which exceeds 700 KB. Therefore, you must ensure that the file size is within the maximum limit.

On clicking the **Validate** button, the system validates the following:

- Whether the account ID given in the record is valid.
- Whether the bill cycle rule code is a valid billing preference.
- Whether the two or more records with the same account ID and effective date combination does not exist in the upload request.

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Note:

If the account ID is invalid, the system derives the account ID using the respective account identifier type and account identifier combination. If the system could not derive the account ID using the account identifier type and account identifier combination, the status of the record is changed to **Invalid**.

If duplicate records exist in the upload request, the system validates and changes the status of one record to **Valid** and the status of the remaining records to **Invalid**.

If any of above validations fail, the status of the record is changed to **Invalid**. However, if all the above validations are successful, the status of the record is changed to **Valid**. Once all the pending records in the upload request are validated, the status of the upload request is changed to **Validated**.

On clicking the **Submit** button, the system checks whether the approval is required for the upload request. If the approval is required for the upload request, the status of the upload request is changed to **Approval In Progress**. However, if the approval is not required for the upload request, the status of the upload request is changed to **Submitted**.

The approver can either approve or reject the upload request based on the observations. On approving an upload request, the status of the upload request is changed to **Approved**. However, on rejecting an upload request, the status of the upload request is changed to **Rejected**.

Once the status of the upload request is changed to **Submitted** or **Approved**, the system checks whether the upload request must be processed in the real time (i.e., immediately) or in the deferred mode (i.e., in the background). If the number of valid records in the upload request does not exceed the online record process limit, the system changes the status of the upload request to **Processing**. However, if the number of valid records in the upload request exceeds the online record process limit, the system changes the status of the upload request to **Deferred Processing**. The system then changes the status of the upload request from **Deferred Processing** to **Processing** when the **C1-UPLRQ** batch is executed.

Once the status of the upload request is changed to **Processing**, the system derives the characteristic type specified in the **Bill Cycle Rule Code** option type of the **C1-ASOBLLNG** feature configuration. For each valid record, the system checks whether a billing preference characteristic with the derived characteristic type and effective date combination is already defined for the account. If so, the system updates the existing billing preference characteristic value of the account. However, if a billing preference characteristic with the derived characteristic type and effective date combination does not exist for the account, the system creates the billing preference characteristic for the account.

Note:

The system creates or updates the billing preference characteristic of the account using the entity business object specified in the respective upload request type.

The system derives the bill cycle from the **Bill Cycle** attribute of the billing preference when the respective characteristic is effective for the account. The derived bill cycle is then stamped against the account.

Once the billing preference characteristic is successfully created or updated for the account, the status of the data record is changed to **Processed**. However, if any error occurs while creating or updating the billing preference characteristic for the account, the status of the data record is changed to **Error**. Finally, the status of the upload request is changed to **Processed**.

Note: This feature is only tested and certified for the fully insured group and individual lines of health insurance business.

Prerequisites

To setup the mass bill cycle rule characteristic creation or modification feature, you need to do the following:

- Define the required upload request type where the upload request business object is set to **C1-BillCycleRuleCharUpdUplReq**.

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- Assign the **C1-BCRUR** To Do type to a To Do role whose users must receive a To Do while submitting a bill cycle rule characteristic creation or modification upload request for approval.
- Define the required characteristic types where the characteristic entity is set to **Upload Request Type**.
- Define the required characteristic types where the characteristic entity is set to **Upload Request**.
- Define the foreign key reference for account (if not available) in the system.
- Define the status reasons for the **Canceled** and **Rejected** statuses of the **C1-BillCycleRuleCharUpdUplReq** business object through the **Status Reason** screen.
- Define the required account identifier types in the system.
- Define the required billing preferences through the **Field Mapping** screen.
- Set the **Bill Cycle Rule Code** option type of the **C1-ASOBLLNG** feature configuration.
- Set the batch control type of the **Upload Request Periodic Monitor (C1-UPLRQ)** batch to **Timed** and define the following attributes:
  - Time Interval
  - Timer Active
  - User ID
  - Batch Language
  - Email Address

  For more information about this batch, see *Oracle Revenue Management and Billing Batch Guide*.

Related Topics

For more information on...	See...
How to define a billing preference	Defining a Billing Preference on page 3617
How to setup the **C1-ASOBLLNG** feature configuration	Setting the C1-ASOBLLNG Feature Configuration on page 4417

Algorithms Used in C1-BillCycleRuleCharUpdUplReq

The following table lists the algorithms which are used in the lifecycle of the **C1-BillCycleRuleCharUpdUplReq** business object:

Status	System Event	Algorithm	Algorithm Type	Description
Draft	Enter	C1-BCRUPRDTL	C1-BCRUPRDTL	Refer to C1-BCRUPRDTL on page 2124.
Validated	Enter	C1-BCRVALID	C1-BCRVALID	Refer to C1-BCRVALID on page 2124.
Canceled	-	-	-	-
Submitted	Enter	C1-UPLSUBENT	C1-UPLSUBENT	Refer to C1-UPLSUBENT on page 2023.
	Enter	C1-DEFERUPLD	C1-DEFERUPLD	Refer to C1-DEFERUPLD on page 2023.
	Monitor	F1-AT-RQJ	F1-GEN-BOMNJ	Refer to F1-AT-RQJ on page 225.
Approval In Progress	Enter	C1-UPLAPPENT	C1-UPLAPPENT	Refer to C1-UPLAPPENT on page 2024.
	Exit	C1-UPLAPPEXT	C1-UPLAPPEXT	Refer to C1-UPLAPPEXT on page 2024.

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Status	System Event	Algorithm	Algorithm Type	Description
	Exit	F1-TODOCOMPL	F1-TODOCOMPL	Refer to F1-TODOCOMPL on page 1469.
Approved	Enter	C1-DEFERUPLD	C1-DEFERUPLD	Refer to C1-DEFERUPLD on page 2023.
	Monitor	F1-AT-RQJ	F1-GEN-BOMNJ	Refer to F1-AT-RQJ on page 225.
Rejected	-	-	-	-
Deferred Processing	Monitor	F1-AT-RQJ	F1-GEN-BOMNJ	Refer to F1-AT-RQJ on page 225.
Processing	Enter	C1-BCRPROC	C1-BCRPROC	Refer to C1-BCRPROC on page 2126.
	Monitor	F1-AT-RQJ	F1-GEN-BOMNJ	Refer to F1-AT-RQJ on page 225.
Processed	-	-	-	-

C1-BCRUPRDTL

This algorithm reads the data in the BO_DATA_AREA column of the C1_UPL_REQUEST table and accordingly inserts the records in the C1_UPLOAD_REQ_DTLS table. In addition, the status of each record in the C1_UPLOAD_REQ_DTLS table is set to **Pending**.

It validates the following:

- Either the account ID or account identifier type and account identifier is specified in the record.
- Effective date and bill cycle rule code is specified in the record.

If the account ID is not specified in the record, it derives the account ID using the respective account identifier type and account identifier combination. Once the account ID is derived, the corresponding record is updated in the C1_UPLOAD_REQ_DTLS table. If the system could not derive the account ID using the account identifier type and account identifier combination, the status of the record in the C1_UPLOAD_REQ_DTLS table is changed to **Invalid**. In addition, if any of the above validations fail, the status of the record in the C1_UPLOAD_REQ_DTLS table is changed to **Invalid**.

This algorithm also derives the fields which can be used as search filters based on the mapping defined in the respective upload request type.

C1-BCRVALID

This algorithm is invoked when the user clicks the **Validate** button. It validates the records which are in the **Pending** status. It validates the following:

- Whether the account ID given in the record is valid.

  Note: If the account ID is invalid, it derives the account ID using the respective account identifier type and account identifier combination. Once the account ID is derived, the corresponding record is updated in the C1_UPLOAD_REQ_DTLS table. If the system could not derive the account ID using the account identifier type and account identifier combination, the status of the record in the C1_UPLOAD_REQ_DTLS table is changed to **Invalid**.
- Whether the bill cycle rule code is a valid billing preference.
- Whether the two or more records with the same account ID and effective date combination does not exist in the upload request.

  Note: If duplicate records exist in the upload request, it validates and changes the status of one record to **Valid** and the status of the remaining records to **Invalid**.

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If any of above validations fail, the status of the record in the C1_UPLOAD_REQ_DTLS table is changed to **Invalid**. However, if all the above validations are successful, the status of the record in the C1_UPLOAD_REQ_DTLS table is changed to **Valid**. Once all the pending records in the upload request are validated, the status of the upload request is changed to **Validated**.

Note: If there are no pending records while validating an upload request, a message appears indicating that there are no records to be validated. In such case, you can only delete an upload request.

C1-UPLSUBENT

This algorithm is invoked when the user clicks the **Submit** button. It checks whether the approval is required for the upload request. If the approval is required for the upload request, the status of the upload request is changed to **Approval In Progress**. However, if the approval is not required for the upload request, the status of the upload request is changed to **Submitted**.

C1-DEFERUPLD

This algorithm is invoked when the status of the upload request is changed to **Submitted** or **Approved**. It checks whether the upload request must be processed in the real time (i.e., immediately) or in the deferred mode (i.e., in the background). If the number of valid records in the upload request does not exceed the online record process limit, it changes the status of the upload request to **Processing**. However, if the number of valid records in the upload request exceeds the online record process limit, it changes the status of the upload request to **Deferred Processing**.

It contains the following parameter:

- **Online Record Process Limit** - Used to indicate the maximum number of valid records you can process in the real time (i.e., immediately). This parameter is mandatory.

F1-AT-RQJ

This algorithm transitions the current status of the business object to the specified status. It contains the following parameters:

- **Next Status** – Used when you want to override the default next status specified in the lifecycle.
- **Next Transition Condition** – Used when you want to override the default next transition condition specified in the lifecycle.

At a time, you can specify value for either the **Next Status** or **Next Transition Condition** parameter. If you don't specify any value for these parameters, the system will transition the business object to the default next status specified in its lifecycle.

C1-UPLAPPENT

This algorithm is invoked when the status of the upload request is changed to **Approval In Progress**. It creates a To Do using the approval To Do type that is specified in the respective upload request type. Once a To Do is created, it is assigned to all the users with the approval To Do role that is specified in the respective upload request type. In addition, it creates a log entry for the upload request when the To Do is created for the approver.

C1-UPLAPPEXT

This algorithm is invoked when the user clicks the **Approve** or **Reject** button. It checks whether the approver is associated with the approval To Do role specified in the respective upload request type. If not, it does not allow the approver to approve or reject the upload request. In addition, it does not allow the submitter to approve or reject the upload request.

F1-TODOCOMPL

This algorithm completes the To Do entries that are linked to an object when the object exits the given status. It finds and completes all open To Do entries where the business object's primary key is defined as a drill key. However, if the

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Exclude To Do Entries From Auto Completion (**F1-EXLTD**) characteristic is set to **Y** for a To Do type, the system does not automatically complete the respective To Do entry.

This algorithm contains the following parameter:

- **'Do Not Complete To Do Type' Char Type** – Used to specify the characteristic type that indicates whether the To Do entries should be automatically completed or not.

> **Note:** The **F1-EXLTD** characteristic type is shipped with the product. You can either use the **F1-EXLTD** characteristic type or a custom characteristic type, if required. Note that you must specify a predefined characteristic type where the characteristic entity is set to **To Do Type** and the predefined values are set to **Y** or **N**.

C1-BCRPROC

This algorithm is invoked when the status of the upload request is changed to **Processing**. It fetches a list of records which are in the **Valid** status. It derives the characteristic type specified in the **Bill Cycle Rule Code** option type of the **C1-ASOBLLNG** feature configuration. For each valid record, the system checks whether a billing preference characteristic with the derived characteristic type and effective date combination is already defined for the account. If so, the system updates the existing billing preference characteristic value of the account. However, if a billing preference characteristic with the derived characteristic type and effective date combination does not exist for the account, the system creates the billing preference characteristic for the account.

> **Note:**
>
> The system creates or updates the billing preference characteristic of the account using the entity business object specified in the respective upload request type.
>
> The system derives the bill cycle from the **Bill Cycle** attribute of the billing preference when the respective characteristic is effective for the account. The derived bill cycle is then stamped against the account.

If the record is successfully processed, the status of the record is changed to **Processed**. However, if the record could not be processed successfully due to any reason, the status of the record is changed to **Error**. Finally, the status of the upload request is changed to **Processed**.

Mass Bill Cycle Rule Characteristic Creation or Modification CSV Format

The following table lists and describes the columns that should be available in the CSV file while creating or updating bill cycle rule characteristic of multiple accounts at once through an upload request:

Sr. No.	Column Name	Column Description	Mandatory (Yes or No)
1	Account Identifier Type	Used to specify the account identifier type.	Yes (Conditional)
		Note: You must specify an account identifier type which is already defined in the system.	**Note:** This data is required when the account ID is not specified in the record.
2	Account Identifier	Used to specify the account identifier.	Yes (Conditional)
		Note: The system derives the account using the given account identifier type and account identifier combination when the account ID is either not specified or is invalid in the record.	**Note:** This data is required when the account ID is not specified in the record.
3	Account ID	Used to indicate the account for which you want to define or update the bill cycle rule characteristic.	Yes (Conditional)

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Sr. No.	Column Name	Column Description	Mandatory (Yes or No)
			Note: This data is required when the account identifier type and account identifier are not specified in the record.
4	Effective Date	Used to specify the date from when the characteristic is effective for the account. **Note:** You must specify the date in the **YYYY-MM-DD** format.	Yes
5	Bill Cycle Rule Code	Used to specify the bill cycle rule characteristic value. **Note:** You must specify a valid preference where the preference category is set to **Billing**.	Yes

Note:

The CSV file should contain the columns in the above mentioned sequence.

Before uploading the file, ensure that the column headers specified in the CSV file are mapped to the schema of the respective upload request business object through data mapping in the upload request type. Otherwise, erroneous results might occur. For more information, see Mapping Data and Configuring Filters for an Upload Request Type on page 1433.

Sample Mass Bill Cycle Rule Characteristic Creation or Modification CSV File

```
Account Identifier Type,Account Identifier,Account ID,Effective Date,Bill Cycle Rule Code
IBAN,XX 80 WEST 123456 98765432,7303076857,2025-04-01,BC01
IBAN,XX 80 WEST 123456 98765433,8972090713,2025-04-01,BC02
IBAN,XX 80 WEST 123456 98765434,9224077553,2025-04-01,BC01
IBAN,XX 80 WEST 123456 98765435,1095672715,2025-04-01,BC02
IBAN,XX 80 WEST 123456 98765436,3935142985,2025-04-01,BC01
IBAN,XX 80 WEST 123456 98765437,6276164459,2025-04-01,BC02
,,,,
,,,,
,,,,
,,,,
```

Upload Request Type

Oracle Revenue Management and Billing allows you to define an upload request type using which you can upload a CSV file and thereby create an upload request. Note that you can upload a single CSV file at a time. The system provides the following two business objects to create distinct upload request types:

- **Adjustment Upload Request Type (i.e., C1-AdjRequestType)** - Enables you to maintain an adjustment upload request type. While creating an upload request type using the **C1-AdjRequestType** business object, you need to specify the **Adjustment Upload Request (i.e., C1-ADJUPLD)** business object. It enables you to create an adjustment upload request through which you can create adjustments against the contracts.
- **Upload Request Type (i.e., C1-UplRequestType)** - Enables you to maintain an upload request type. While creating an upload request type using the **C1-UplRequestType** business object, you can specify either of the following business object to create the respective upload request:

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- **Bill Cycle Update Upload (i.e., C1-BillCycleUpdateUplReq)** - Enables you to maintain an accounts' bill cycle update upload request through which you can update the bill cycle of the accounts.
- **Bill Group Derivation & Pricing Parameter (i.e., C1-BillLevelUploadRequest)** - Enables you to maintain a bill group derivation and pricing parameters record creation upload request through which you can define the derivation and pricing parameters for the bill groups.
- **Bill Group Sorting Upload Request (i.e., C1-BillGrpSortUploadRequest)** - Enables you to maintain a bill group sort record creation upload request through which you can define sort ID for the bill groups.
- **Billable Charge Upload for Fully Insured (i.e., C1-BillableChargeUploadFI)** - Enables you to maintain a billable charge creation upload request through which you can create the billable charges for the accounts. Note that this business object is only applicable for the fully insured group and individual lines of health insurance business.
- **Contract Rider Upload (i.e., C1-ContractRiderUpdateUplReq)** - Enables you to maintain a contract rider update upload request through which you update the contract rider information of the contracts.
- **Hold Request Upload (i.e., C1-HoldUploadRequest)** - Enables you to maintain a hold request creation upload request through which you can create a hold request for the accounts.
- **Refund Request Upload (i.e., C1-RefundUploadRequest)** - Enables you to maintain a refund request creation upload request through which you can create a refund request for the accounts.
- **Reinstatement Upload Request (i.e., C1-ReinstatementUploadRequest)** - Enables you to maintain a policy reinstatement upload request through which you can reinstate the fully insured group policies.
- **Tender Cancelation Upload Request (i.e., C1-TndrCnclUploadRequest)** - Enables you to maintain a payment tender cancellation upload request through which you can cancel payment tenders.
- **Write Off Request Upload (i.e., C1-WriteOffUploadRequest)** - Enables you to maintain a write off request creation upload request through which you can create a write off request for the accounts.
- **Bill Cycle Rule Characteristic Upload (i.e., C1-BillCycleRuleCharUpdUplReq)** - Enables you to maintain a bill cycle rule characteristic creation or modification upload request through which you can maintain the bill cycle rule characteristic of the accounts.

It is the upload request type which helps the system to determine the following:

- Business object using which the upload request should be created in the system.
- Business object using which you want to create or update the entities through an upload request.
- Whether an adjustment upload request must be processed in the deferred mode (i.e., in the background) or in the online mode (i.e., real time).

> **Note:** You can configure whether the other upload requests must be validated or processed in the deferred or online mode by setting the parameter in the **C1-DEFERVALD** and **C1-DEFERUPLD** algorithm, respectively, attached to the lifecycle of the respective upload request business object.

- Whether approval is required while submitting an upload request for further processing (i.e., before creating or updating the entities in the system).
- Whether you want to display information about the entity once it is created through an upload request using the respective foreign key reference.
- Map the CSV columns with the schema of the upload request business object so that the data is stored in the respective tags.
- Configure the search filters for an upload request type using which you can filter the data records while viewing details of the respective upload request.
- Associate match types using which the system derives the contract and creates an adjustment against the respective contract.

Some of the above functions are common for the upload request types created using the **C1-AdjRequestType** and **C1-UplRequestType** business objects, whereas some are specific to the respective business object. For more information, see Defining an Upload Request Type on page 1404.

The **Upload Request Type** screen allows you to define, edit, delete, and copy an upload request type. It contains the following zones:

- Upload Request Type List on page 1400

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- Upload Request Type on page 1401

The following table lists the upload request types which are shipped with the product:

Upload Request Type	Description
BILL_CYCLE_UPD_UPL_REQ_TYPE	Bill Cycle Update Upload
SA_RIDER_UPD_UPL_REQ_TYPE	Contract Rider Upload
HOLD_UPL_REQ_TYPE	Hold Request Upload
REFUND_UPL_REQ_TYPE	Refund Request Upload
WO_UPL_REQ_TYPE	Write Off Request Upload
BILL_SRT_UPL_REQ_TYPE	Bill Group Sort Upload Request Type
BILL_LVL_UPL_REQ_TYPE	Bill Group Derivation Upload Request Type
B_UPLOAD_FI	Billable Charge Upload for Fully Insured
TNDR_CNCL_UPL_REQ_TYPE	Tender Cancellation Request Upload

You can use the above shipped upload request types to create the respective upload requests or use a custom upload request type based on the requirements.

Upload Request Type List

The **Upload Request Type List** zone lists the upload request types that are already defined in the system. It contains the following columns:

Column Name	Column Description
Upload Request Type	Displays the upload request type.
Description	Displays the description of the upload request type.
Edit	On clicking the **Edit** (✎) icon, the **Upload Request Type** screen appears where you can edit the details of the upload request type.
Duplicate	On clicking the **Duplicate** (⧉) icon, the **Upload Request Type** screen appears where you can define a new upload request type using an existing upload request type.
Delete	On clicking the **Delete** (🗑) icon, you can delete the upload request type. **Note:** You can delete an upload request type only when an upload request is not yet created using the upload request type.
Mapping	On clicking the **Mapping** (🔗) icon, the **Upload Request Mapping** screen appears where you can do the following: • Map the data of the CSV file to the schema of the respective upload request business object. The system will then store the data in the respective tags of the upload request business object schema. • Configure the search filters for the upload request type. The system will then display the search filters (in the specified sequence) in the **Data Records** zone of the **Upload Request** screen while viewing the details of the respective upload requests.

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Column Name	Column Description
	Note: This column is applicable only for an upload request type which is created using the **C1-UplRequestType** business object and not for an upload request type which is created using the**C1-AdjRequestType** business object.
Status	Indicates the status of the upload request type. The valid values are: • ACTIVE • INACTIVE

On clicking the **Broadcast** (📡) icon corresponding to an upload request type, the **Upload Request Type** zone appears with the details of the respective upload request type.

Related Topics

For more information on...	See...
How to edit an upload request type	Editing an Upload Request Type on page 1416
How to copy an upload request type	Copying an Upload Request Type on page 1424
How to delete an upload request type	Deleting an Upload Request Type on page 1435
How to map data and configure search filters for an upload request type	Mapping Data and Configuring Filters for an Upload Request Type on page 1433
How to view the details of an upload request type	Viewing the Upload Request Type Details on page 1436

Upload Request Type

The **Upload Request Type** zone displays the details of the upload request type. It contains the following sections:

- **Main** - Displays the basic information about the upload request type. It contains the following fields:

Field Name	Field Description
Upload Request Type	Displays the upload request type.
Upload Request Business Object	Indicates the business object using which an upload request should be created.
	Note: It has a link. On clicking the link, the **Business Object** screen appears where you can view the details of the respective business object.
Description	Displays the description of the upload request type.
Detailed Description	Displays additional information about the upload request type.
Status	Indicates the status of the upload request type. The valid values are: • Active • Inactive
File Size (KB)	Indicates the maximum file size limit (in kilobytes) while uploading files using the upload request type.

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Field Name	Field Description
	Note: This field appears when the upload request type is created using the **C1-AdjRequestType** business object.
Defer Algorithm	Indicates the algorithm that will be triggered when you click the **Create Adjustment** or **Approve** button.
	Note: It has a link. On clicking the link, the **Algorithm** screen appears where you can view the details of the respective algorithm. This field appears when the upload request type is created using the **C1-AdjRequestType** business object.
Entity Business Object	Indicates the business object using which you want to create or update the entities through the respective upload request.
	Note: It has a link. On clicking the link, the **Business Object** screen appears where you can view the details of the respective business object. This field appears when the upload request type is created using the **C1-UplRequestType** business object.
Approval Required	Indicates whether approval is required while creating or updating entities through the respective upload request.
Approval To Do Type	Indicates that the To Do entry of the specified To Do type must be created when an upload request is submitted for approval.
	Note: This field appears when the **Approval Required** option is selected. It has a link. On clicking the link, the **To Do Type** screen appears where you can view the details of the respective To Do type.
Approval To Do Role	Indicates that users with the specified To Do role can only approve an upload request which is submitted for approval.
	Note: This field appears when the **Approval Required** option is selected. It has a link. On clicking the link, the **To Do Role** screen appears where you can view the details of the respective To Do role.
FK Reference Code	Indicates the foreign key reference using which you want to display information about the entity once it is created through an upload request.

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Field Name	Field Description
	Note: It has a link. On clicking the link, the **Foreign Key Reference** screen appears where you can view the details of the respective foreign key reference. This field appears when the upload request type is created using the **C1-UplRequestType** business object.

- **Adjustment Match Type** - Lists the match types using which you want to create adjustments for the respective adjustment upload requests. This section appears when the upload request type is created using the **C1-AdjRequestType** business object. It contains the following columns:

Column Name	Column Description
Match Type	Indicates the match type for which the algorithm is associated. The valid values are: • Contract • Contract Type
Algorithm	Indicates the algorithm that will be triggered to derive the contract.
	Note: It has a link. On clicking the link, the **Algorithm** screen appears where you can view the details of the respective algorithm.

- **Characteristics** - Lists the characteristics of the upload request type. It contains the following columns:

Column Name	Column Description
Characteristic Type	Indicates the characteristic type.
Characteristic Value	Displays the value of the characteristic type.

- **Record Actions** - Enables you to perform various actions on the upload request type. It contains the following buttons:

Button Name	Button Description
Edit	Used to edit the details of the upload request type.
Delete	Used to delete the upload request type.
	Note: You can delete an upload request type when an upload request is not yet created using the upload request type.
Duplicate	Used to create a new upload request type using an existing upload request type.

- **Record Information** - This section contains the following field:

Field Name	Field Description
Business Object	Indicates the business object using which an upload request type is created.
	Note: It has a link. On clicking the link, the **Business Object** screen appears where you can view the details of the respective business object.

By default, the **Upload Request Type** zone does not appear in the **Upload Request Type** screen. It appears when you click the **Broadcast** (📡) icon corresponding to the upload request type in the **Upload Request Type List** zone.

Related Topics

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For more information on...	See...
Upload Request Type screen	Upload Request Type on page 1399
Upload Request Type List zone	Upload Request Type List on page 1400
How to define an upload request type	Defining an Upload Request Type on page 1404
How to edit an upload request type	Editing an Upload Request Type on page 1416
How to copy an upload request type	Copying an Upload Request Type on page 1424
How to delete an upload request type	Deleting an Upload Request Type on page 1435
How to view the details of an upload request type	Viewing the Upload Request Type Details on page 1436

Defining an Upload Request Type

Prerequisites

To define an upload request type, you should have:

If you want to create...	Then, you should have...
An adjustment upload request type	• Upload request type business objects defined in the application • Upload request business objects defined in the application • A defer algorithm created using the **C1-UPLDEFEVL** algorithm type in the application • Required To Do role assigned to the **C1-ADJUP** To Do type in the application • An algorithm created using the **C1-MTCIALG** or **C1-MTCTALG** algorithm type in the application depending on the match type using which you want to create the adjustments
An accounts' bill cycle update upload request type	• Upload request type business objects defined in the application • Upload request business objects defined in the application • Required To Do role assigned to the **C1-BCUUR** To Do type in the application • Required entity business object (for example, C1-AccountBO) defined in the application • Required foreign key reference for the account (for example, C1-ACCT) defined in the application

A bill group derivation and pricing parameters record creation upload request type	• Upload request type business objects defined in the application
	• Upload request business objects defined in the application
	• An approval To Do type named **C1-BGDVP** created with the following specifications:
	  • **Navigation Option** - c1upldrqTabMenu
	  • **Sort Key** - Upload Request ID
	  • **Drill Key Table** - C1_UPLOAD_REQ
	  • **Drill Key Field** - UPLOAD_REQ_ID

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If you want to create...	Then, you should have...
	• Required To Do role assigned to the **C1-BGDVP** To Do type in the application • Required entity business object (for example, C1-BillLevel) defined in the application • Required foreign key reference for the bill group (i.e., person) defined in the system.

A bill group sort record creation upload request type	• Upload request type business objects defined in the application
	• Upload request business objects defined in the application
	• An approval To Do type named **C1-BGSRT** created with the following specifications:
	  • **Navigation Option** - c1upldrqTabMenu
	  • **Sort Key** - Upload Request ID
	  • **Drill Key Table** - C1_UPLOAD_REQ
	  • **Drill Key Field** - UPLOAD_REQ_ID
	• Required To Do role assigned to the **C1-BGSRT** To Do type in the application
	• Required entity business object (for example, C1-BillingGroupSortId) defined in the application
	• Required foreign key reference for the bill group (i.e., person) defined in the system.

A billable charge creation upload request type (for the fully insured group and individual lines of business)	• Upload request type business objects defined in the application • Upload request business objects defined in the application • Required To Do role assigned to the **C1-BCUR** To Do type in the application • Required entity business object (for example, C1-BILLCHARGE) defined in the application • Required foreign key reference for the billable charge (for example, C1-BCHIN) defined in the application
A contract rider update upload request type	• Upload request type business objects defined in the application • Upload request business objects defined in the application • Required To Do role assigned to the **C1-CRUUR** To Do type in the application • Required entity business object (for example, C1_SA) defined in the application • Required foreign key reference for the contract defined in the application
A hold request creation upload request type	• Upload request type business objects defined in the application • Upload request business objects defined in the application • Required To Do role assigned to the **C1-HLDUR** To Do type in the application • Required entity business object (for example, C1-HoldRequest) defined in the application • Required foreign key reference for the hold request (for example, C1-HLDRE) defined in the application
A refund request creation upload request type	• Upload request type business objects defined in the application • Upload request business objects defined in the application

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If you want to create...	Then, you should have...
	• Required To Do role assigned to the **C1-REFUR** To Do type in the application • Required entity business object (for example, C1-RefundReq) defined in the application • Required foreign key reference for the refund request (for example, C1-REFWO) defined in the application
A policy reinstatement upload request type	• Upload request type business objects defined in the application • Upload request business objects defined in the application • Required To Do role assigned to the **C1-RPUR** To Do type in the application • Required entity business object (for example, C1-POLICY) defined in the application • Required foreign key reference for the policy (for example, C1-POLCY) defined in the application
A payment tender cancellation upload request type	• Upload request type business objects defined in the application • Upload request business objects defined in the application • Required To Do role assigned to the **C1-TNDCL** To Do type in the application • Required foreign key reference for the payment event (for example, C1-PEVT) defined in the application
A write off request creation upload request type	• Upload request type business objects defined in the application • Upload request business objects defined in the application • Required To Do role assigned to the **C1-WOUR** To Do type in the application • Required entity business object (for example, C1-WORequest) defined in the application • Required foreign key reference for the write off request (for example, C1-REFWO) defined in the application
A bill cycle rule characteristic creation or modification upload request type	• Upload request type business objects defined in the application • Upload request business objects defined in the application • Required To Do role assigned to the **C1-BCRUR** To Do type in the application • Required entity business object (for example, C1-AccountBO) defined in the application • Required foreign key reference for the account (for example, C1-ACCT) defined in the application

Procedure

To define an upload request type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **U** and then click **Upload Request Type**.
   A sub-menu appears.
3. Click the **Add** option from the **Upload Request Type** sub-menu.

   The **Select Business Object** screen appears. It contains the following field:

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Field Name	Field Description	Mandatory (Yes or No)
Upload Request Type Business Object	Used to indicate the business object using which you want to create the upload request type. The valid values are: • **Adjustment Upload Request Type (i.e., C1-AdjRequestType)** - Enables you to maintain an adjustment upload request type. • **Upload Request Type (i.e., C1-UplRequestType)** - Enables you to maintain an upload request type. **Note:** The above mentioned business objects are shipped with the product. The list includes those business objects which are created using the **Upload Request Type** (i.e., **C1-UPLREQTYP**) maintenance object.	Yes

Tip: Alternatively, you can access the **Select Business Object** screen by clicking the **Add** button in the **Page Title** area of the **Upload Request Type** screen.

Note: The **Select Business Object** screen appears when there are multiple upload request type business objects defined in the application. If there is only one upload request type business object defined in the application, the **Upload Request Type** screen appears.

4. Select the required upload request type business object from the respective field.
5. Click **OK**.

The **Upload Request Type** screen appears. It contains the following sections:

- **Main** - Used to specify the basic details for the upload request type.
- **Adjustment Match Type** - Used to specify the match type using which you want to create adjustments for the respective adjustment upload requests.

  Note: This section appears when you are creating an upload request type using the **C1-AdjRequestType** business object.
- **Characteristics** - Used to define the characteristics for the upload request type.

The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Upload Request Type	Used to specify the upload request type.	Yes
Upload Request Type Business Object	Indicates the business object using which you are defining the upload request type.	Not applicable
Upload Request Business Object	Used to indicate the business object using which you want to create the respective upload request. If you are creating an upload request type using the **C1-AdjRequestType** business object, the valid value is: • **Adjustment Upload Request (i.e., C1-ADJUPLD)** - Enables you to maintain an adjustment upload request.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	However, if you are creating an upload request type using the **C1-UplRequestType** business object, the valid values are: • **Bill Cycle Update Upload (i.e., C1-BillCycleUpdateUplReq)** - Enables you to maintain an accounts' bill cycle update upload request. • **Bill Group Derivation & Pricing Parameter (i.e., C1-BillLevelUploadRequest)** - Enables you to maintain a bill group derivation and pricing parameters record creation upload request. • **Bill Group Sorting Upload Request (i.e., C1-BillGrpSortUploadRequest)** - Enables you to maintain a bill group sort record creation upload request. • **Billable Charge Upload for Fully Insured (i.e., C1-BillableChargeUploadFI)** - Enables you to maintain a billable charge creation upload request. Note that this business object is only applicable for the fully insured group and individual lines of health insurance business. • **Contract Rider Upload (i.e., C1-ContractRiderUpdateUplReq)** - Enables you to maintain a contract rider update upload request. • **Hold Request Upload (i.e., C1-HoldUploadRequest)** - Enables you to maintain a hold request creation upload request. • **Refund Request Upload (i.e., C1-RefundUploadRequest)** - Enables you to maintain a refund request creation upload request. • **Reinstatement Upload Request (i.e., C1-ReinstatementUploadRequest)** - Enables you to maintain a policy reinstatement upload request. • **Tender Cancelation Upload Request (i.e., C1-TndrCnclUploadRequest)** - Enables you to maintain a payment tender cancellation upload request. • **Write Off Request Upload (i.e., C1-WriteOffUploadRequest)** - Enables you to maintain a write off request creation upload request. • **Bill Cycle Rule Characteristic Upload (i.e., C1-BillCycleRuleCharUpdUplReq)** - Enables you to maintain a bill cycle rule characteristic creation or modification upload request.	

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The above mentioned business objects are shipped with the product. The list includes those business objects which are created using the **Upload Request (Adjustment Upload)** (i.e., **C1-UPLREQ**) or **Upload Request** (i.e., **C1-UPLOADREQ**) maintenance object depending on the business object used to create the upload request type.	
Description	Used to specify the description for the upload request type.	Yes
Detailed Description	Used to specify additional information about the upload request type. **Note:** You can resize the text box depending on your requirement by clicking the **Resize Handle** (⁄) icon at the bottom right corner of the text box.	No
Status	Used to indicate the status of the upload request type. The valid values are: • Active • Inactive	Yes
File Size (KB)	Used to indicate the maximum file size limit (in kilobytes) while uploading files using the upload request type. **Note:** You must specify a positive integer value in this field. This field appears when you are creating an upload request type using the **C1-AdjRequestType** business object. By default, the maximum file size limit is set to 700 KB in all the business objects which are created using the **Upload Request** (i.e., **C1-UPLOADREQ**) maintenance object. Therefore, you don't need to explicitly set the maximum file size limit while defining an upload request type using the **C1-UplRequestType** business object.	Yes
Defer Algorithm	Used to attach an algorithm that will be triggered when you click the **Create Adjustment** or **Approve** button.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The **Search** (🔍) icon appears corresponding to the **Defer Algorithm** field. On clicking the **Search** icon, the **Algorithm Search** window appears. You need to attach an algorithm created using the **C1-UPLDEFEVL** algorithm type to this field. This algorithm checks whether the number of records in the uploaded file exceeds the specified online record process limit. If the number of records in the uploaded file does not exceed the online record process limit, the system creates the adjustments in the real time (i.e., immediately). However, if the number of records in the uploaded file exceeds the online record process limit, the system creates the adjustments in the deferred mode. The **Deferred** mode means in the background when the **Upload Request Periodic Monitor (C1-UPLRQ)** batch is executed. You can configure the **Upload Request Periodic Monitor (C1-UPLRQ)** batch such that it is executed at regular intervals. For more information about the batch, see *Oracle Revenue Management and Billing Batch Guide*. This field appears when you are creating an upload request type using the **C1-AdjRequestType** business object.	
Entity Business Object	Used to indicate the business object using which you want to create or update the entities through the respective upload request. You must use the following entity business object for the respective upload request type: • While defining an accounts' bill cycle update upload request type, you must set the entity business object to **C1-AccountBO**. • While defining a bill group derivation and pricing parameters record creation upload request type, you must set the entity business object to **C1-BillLevel**. • While defining a bill group sort record creation upload request type, you must set the entity business object to **C1-BillingGroupSortId**. • While defining a billable charge creation upload request type, you must set the entity business object to **C1-BILLCHARGE**. • While defining a contract rider update upload request type, you must set the entity business object to **C1_SA**.	No

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Field Name	Field Description	Mandatory (Yes or No)
	• While defining a hold request creation upload request type, you must set the entity business object to **C1-HoldRequest**. • While defining a refund request creation upload request type, you must set the entity business object to **C1-RefundReq**. • While defining a policy reinstatement upload request type, you must set the entity business object to **C1-POLICY**. • While defining a write off request creation upload request type, you must set the entity business object to **C1-WORequest**. • While defining a bill cycle rule characteristic creation or modification upload request type, you must set the entity business object to **C1-AccountBO**. **Note:** The **Search** (🔍) icon appears corresponding to the **Entity Business Object** field. On clicking the **Search** icon, the **Business Object Search** window appears. This field appears when you are creating an upload request type using the **C1-UplRequestType** business object. The **Upload Request** feature enables you to upload business object based entities and non business object based entities in the system. If you want to create business object based entities through the respective upload request, you need to specify the entity business object in the upload request type. However, if you want to create non business object based entities (i.e., entities created via any business service) through the respective upload request, you do not need to specify the entity business object in the upload request type. For example, while defining a payment tender cancellation upload request type, you do not need to specify the entity business object.	
Approval Required	Used to indicate whether approval is required while creating or updating entities through the respective upload request.	No
Approval To Do Type	Used to indicate that the To Do entry of the specified To Do type must be created when an upload request is submitted for approval.	Yes (Conditional)

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The **Search** (🔍) icon appears corresponding to the **Approval To Do Type** field. On clicking the **Search** icon, the **To Do Type Search** window appears. On specifying the To Do type, the description of the To Do type appears corresponding to the **Approval To Do Type** field. This field appears when the **Approval Required** option is selected. You can use the respective To Do type mentioned in the prerequisites or a custom To Do type, if required.	**Note:** This field is required when the **Approval Required** option is selected.
Approval To Do Role	Used to indicate that users with the specified To Do role can only approve an upload request which is submitted for approval. **Note:** The list includes only those To Do roles which are associated with the approval To Do type. This field appears when the **Approval Required** option is selected.	Yes (Conditional) **Note:** This field is required when the **Approval Required** option is selected.
FK Reference Code	Used to indicate the foreign key reference using which you want to display information about the entity once it is created through an upload request. **Note:** If the foreign key reference is specified in the upload request type, the system displays the entity information for the respective upload requests in the **Data Records** zone of the **Upload Request** screen once the entity is created (i.e., once the upload request is processed). However, if the foreign key reference is not specified in the upload request type, the system does not display the entity information for the respective upload requests. The **Search** (🔍) icon appears corresponding to the **FK Reference Code** field. On clicking the **Search** icon, the **Foreign Key Search** window appears. This field appears when you are creating an upload request type using the **C1-UplRequestType** business object.	No

6. Enter the required details in the **Main** section.
7. Associate a match type with the adjustment upload request type.

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8. Define characteristics for the upload request type, if required.
9. Click **Save**.
   The upload request type is defined.

Related Topics

For more information on...	See...
Upload Request Type screen	Upload Request Type on page 1399
How to associate a match type with an adjustment upload request type	Associating a Match Type with an Adjustment Upload Request Type on page 1413
How to define a characteristic for an upload request type	Defining a Characteristic for an Upload Request Type on page 1415

Associating a Match Type with an Adjustment Upload Request Type

Prerequisites

To associate a match type with an adjustment upload request type, you should have:

- Required algorithm defined for the selected match type

Note:

The following algorithms are shipped with the product for the respective match type:

Match Type	Algorithm Type	Algorithm	Algorithm Description
Contract	C1-MTCIALG	C1-MTCIALG	This algorithm derives the contract for each adjustment record where the match type is set to **CONT**.
Contract Type	C1-MTCTALG	C1-MTCTALG	This algorithm derives the contract using the contract type and account details for each adjustment record where the match type is set to **CNTY**. If there are multiple active contracts of the specified contract type on the account, the contract with the latest start date is considered.

Procedure

To associate a match type with an adjustment upload request type:

1. Ensure that the **Adjustment Match Type** section is expanded when you are defining, editing, or copying an adjustment upload *r*equest type.

   The **Adjustment Match Type** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Match Type	Used to indicate the match type for which you want to associate the algorithm. The valid values are: • Contract • Contract Type	Yes (Conditional) **Note:** This field is required when you are creating an upload request type using the **C1-AdjRequestType** business object.

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Field Name	Field Description	Mandatory (Yes or No)
Algorithm	Used to attach an algorithm that will be triggered to derive the contract. The system will then create an adjustment against the respective contract.	Yes (Conditional)
	Note: The **Search** (🔍) icon appears corresponding to the **Algorithm** field. On clicking the **Search** icon, the **Algorithm Search** window appears. You must specify an algorithm which is already defined in the system.	**Note:** This field is required when you are creating an upload request type using the **C1-AdjRequestType** business object.

Note: This section appears when an upload request type is created using the **C1-AdjRequestType** business object.

2. Enter the required details in the **Adjustment Match Type** section.
3. If you want to define more than one match type for the adjustment upload request type, click the **Add** (+) icon and then *r*epeat step 2.

Note: However, if you want to remove a match type from the adjustment upload request type, click the **Delete** (🗑) icon corresponding to the match type.

Related Topics

For more information on...	See...
How to define an upload request type	Defining an Upload Request Type on page 1404
How to edit an upload request type	Editing an Upload Request Type on page 1416
How to copy an upload request type	Copying an Upload Request Type on page 1424

Defining a Characteristic for an Upload Request Type

Prerequisites

To define a characteristic for an upload request type, you should have:

- Characteristic types defined in the application (where the characteristic entity is set to **Upload Request Type**)

Procedure

To define a characteristic for an upload request type:

1. Ensure that the **Characteristics** section is expanded when you are defining, editing, or copying an upload *r*equest type.

   The **Characteristics** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Characteristic Type	Used to indicate the characteristic type.	Yes (Conditional)
	Note: The list includes only those characteristic types where the characteristic entity is set to **Upload Request Type**.	**Note:** This field is required when you are defining a characteristic for the upload request type.

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Field Name	Field Description	Mandatory (Yes or No)
Characteristic Value	Used to specify the value for the characteristic type.	Yes (Conditional)
	Note: If you select a predefined characteristic type, the **Search** (🔍) icon appears corresponding to the **Characteristic Value** field. On clicking the **Search** icon, the **Predefined Characteristic Search** window appears. On specifying the value for a predefined characteristic type, the description of the characteristic value appears corresponding to the **Characteristic Value** field.	**Note:** This field is required when you are defining a characteristic for the upload request type.

2. Enter the required details in the **Characteristics** section.
3. If you want to define more than one characteristic for the upload request type, click the **Add** (+) icon and then *r*epeat step 2.

Note: However, if you want to remove a characteristic from the upload request type, click the **Delete** (🗑) icon corresponding to the characteristic.

Related Topics

For more information on...	See...
How to define an upload request type	Defining an Upload Request Type on page 1404
How to edit an upload request type	Editing an Upload Request Type on page 1416
How to copy an upload request type	Copying an Upload Request Type on page 1424

Editing an Upload Request Type

Prerequisites

To edit an upload request type, you should have:

If you want to create...	Then, you should have...
An adjustment upload request type	• Upload request business objects defined in the application • A defer algorithm created using the **C1-UPLDEFEVL** algorithm type in the application • Required To Do role assigned to the **C1-ADJUP** To Do type in the application • An algorithm created using the **C1-MTCIALG** or **C1-MTCTALG** algorithm type in the application depending on the match type using which you want to create the adjustments
An accounts' bill cycle update upload request type	• Upload request business objects defined in the application • Required To Do role assigned to the **C1-BCUUR** To Do type in the application • Required entity business object (for example, C1-AccountBO) defined in the application • Required foreign key reference for the account (for example, C1-ACCT) defined in the application

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If you want to create...	Then, you should have...

A bill group derivation and pricing parameters record creation upload request type	• Upload request business objects defined in the application
	• An approval To Do type named **C1-BGDVP** created with the following specifications:
	  • **Navigation Option** - c1upldrqTabMenu
	  • **Sort Key** - Upload Request ID
	  • **Drill Key Table** - C1_UPLOAD_REQ
	  • **Drill Key Field** - UPLOAD_REQ_ID
	• Required To Do role assigned to the **C1-BGDVP** To Do type in the application
	• Required entity business object (for example, C1-BillLevel) defined in the application
	• Required foreign key reference for the bill group (i.e., person) defined in the system.

A bill group sort record creation upload request type	• Upload request business objects defined in the application
	• An approval To Do type named **C1-BGSRT** created with the following specifications:
	  • **Navigation Option** - c1upldrqTabMenu
	  • **Sort Key** - Upload Request ID
	  • **Drill Key Table** - C1_UPLOAD_REQ
	  • **Drill Key Field** - UPLOAD_REQ_ID
	• Required To Do role assigned to the **C1-BGSRT** To Do type in the application
	• Required entity business object (for example, C1-BillingGroupSortId) defined in the application
	• Required foreign key reference for the bill group (i.e., person) defined in the system.

A billable charge creation upload request type (for the fully insured group and individual lines of business)	• Upload request business objects defined in the application • Required To Do role assigned to the **C1-BCUR** To Do type in the application • Required entity business object (for example, C1-BILLCHARGE) defined in the application • Required foreign key reference for the billable charge (for example, C1-BCHIN) defined in the application
A contract rider update upload request type	• Upload request business objects defined in the application • Required To Do role assigned to the **C1-CRUUR** To Do type in the application • Required entity business object (for example, C1_SA) defined in the application • Required foreign key reference for the contract defined in the application
A hold request creation upload request type	• Upload request business objects defined in the application • Required To Do role assigned to the **C1-HLDUR** To Do type in the application • Required entity business object (for example, C1-HoldRequest) defined in the application

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If you want to create...	Then, you should have...
	• Required foreign key reference for the hold request (for example, C1-HLDRE) defined in the application
A refund request creation upload request type	• Upload request business objects defined in the application • Required To Do role assigned to the **C1-REFUR** To Do type in the application • Required entity business object (for example, C1-RefundReq) defined in the application • Required foreign key reference for the refund request (for example, C1-REFWO) defined in the application
A policy reinstatement upload request type	• Upload request business objects defined in the application • Required To Do role assigned to the **C1-RPUR** To Do type in the application • Required entity business object (for example, C1-POLICY) defined in the application • Required foreign key reference for the policy (for example, C1-POLCY) defined in the application
A payment tender cancellation upload request type	• Upload request business objects defined in the application • Required To Do role assigned to the **C1-TNDCL** To Do type in the application • Required foreign key reference for the payment event (for example, C1-PEVT) defined in the application
A write off request creation upload request type	• Upload request business objects defined in the application • Required To Do role assigned to the **C1-WOUR** To Do type in the application • Required entity business object (for example, C1-WORequest) defined in the application • Required foreign key reference for the write off request (for example, C1-REFWO) defined in the application
A bill cycle rule characteristic creation or modification upload request type	• Upload request business objects defined in the application • Required To Do role assigned to the **C1-BCRUR** To Do type in the application • Required entity business object (for example, C1-AccountBO) defined in the application • Required foreign key reference for the account (for example, C1-ACCT) defined in the application

Procedure

To edit an upload request type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **U** and then click **Upload Request Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Upload Request Type** sub-menu.
   The **Upload Request Type** screen appears.

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4. In the **Upload Request Type List** zone, click the **Edit** (✎) icon in the **Edit** column corresponding to the *u*pload request type whose details you want to edit.

   The **Upload Request Type** screen appears. It contains the following sections:

   - **Main** - Used to specify the basic details for the upload request type.
   - **Adjustment Match Type** - Used to specify the match type using which you want to create adjustments for the respective adjustment upload requests.

     Note: This section appears when you are creating an upload request type using the **C1-AdjRequestType** business object.

   - **Characteristics** - Used to define the characteristics for the upload request type.

   The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Upload Request Type	Displays the upload request type.	Not applicable
Upload Request Type Business Object	Indicates the business object which is used while defining the upload request type.	Not applicable
Upload Request Business Object	Used to indicate the business object using which you want to create the respective upload request. If you are creating an upload request type using the **C1-AdjRequestType** business object, the valid value is: • **Adjustment Upload Request (i.e., C1-ADJUPLD)** - Enables you to maintain an adjustment upload request. However, if you are creating an upload request type using the **C1-UplRequestType** business object, the valid values are: • **Bill Cycle Update Upload (i.e., C1-BillCycleUpdateUplReq)** - Enables you to maintain an accounts' bill cycle update upload request. • **Bill Group Derivation & Pricing Parameter (i.e., C1-BillLevelUploadRequest)** - Enables you to maintain a bill group derivation and pricing parameters record creation upload request. • **Bill Group Sorting Upload Request (i.e., C1-BillGrpSortUploadRequest)** - Enables you to maintain a bill group sort record creation upload request. • **Billable Charge Upload for Fully Insured (i.e., C1-BillableChargeUploadFI)** - Enables you to maintain a billable charge creation upload request. Note that this business object is only applicable for the fully insured group and individual lines of health insurance business. • **Contract Rider Upload (i.e., C1-ContractRiderUpdateUplReq)** - Enables you to maintain a contract rider update upload request.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	• **Hold Request Upload (i.e., C1-HoldUploadRequest)** - Enables you to maintain a hold request creation upload request. • **Refund Request Upload (i.e., C1-RefundUploadRequest)** - Enables you to maintain a refund request creation upload request. • **Reinstatement Upload Request (i.e., C1-ReinstatementUploadRequest)** - Enables you to maintain a policy reinstatement upload request. • **Tender Cancelation Upload Request (i.e., C1-TndrCnclUploadRequest)** - Enables you to maintain a payment tender cancellation upload request. • **Write Off Request Upload (i.e., C1-WriteOffUploadRequest)** - Enables you to maintain a write off request creation upload request. • **Bill Cycle Rule Characteristic Upload (i.e., C1-BillCycleRuleCharUpdUplReq)** - Enables you to maintain a bill cycle rule characteristic creation or modification upload request. **Note:** The above mentioned business objects are shipped with the product. The list includes those business objects which are created using the **Upload Request (Adjustment Upload)** (i.e., **C1-UPLREQ**) or **Upload Request** (i.e., **C1-UPLOADREQ**) maintenance object depending on the business object used to create the upload request type.	
Description	Used to specify the description for the upload request type.	Yes
Detailed Description	Used to specify additional information about the upload request type. **Note:** You can resize the text box depending on your requirement by clicking the **Resize Handle** (⇲) icon at the bottom right corner of the text box.	No
Status	Used to indicate the status of the upload request type. The valid values are: • Active • Inactive **Note:** You cannot change the status of an upload request type to **Inactive** when the corresponding upload request is in a status other than **Canceled**, **Rejected**, or **Processed**.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
File Size (KB)	Used to indicate the maximum file size limit (in kilobytes) while uploading files using the upload request type. **Note:** You must specify a positive integer value in this field. This field appears when you are creating an upload request type using the **C1-AdjRequestType** business object. By default, the maximum file size limit is set to 700 KB in all the business objects which are created using the **Upload Request** (i.e., **C1-UPLOADREQ**) maintenance object. Therefore, you don't need to explicitly set the maximum file size limit while defining an upload request type using the **C1-UplRequestType** business object.	Yes
Defer Algorithm	Used to attach an algorithm that will be triggered when you click the **Create Adjustment** or **Approve** button. **Note:** The **Search** (🔍) icon appears corresponding to the **Defer Algorithm** field. On clicking the **Search** icon, the **Algorithm Search** window appears. You need to attach an algorithm created using the **C1-UPLDEFEVL** algorithm type to this field. This algorithm checks whether the number of records in the uploaded file exceeds the specified online record process limit. If the number of records in the uploaded file does not exceed the online record process limit, the system creates the adjustments in the real time (i.e., immediately). However, if the number of records in the uploaded file exceeds the online record process limit, the system creates the adjustments in the deferred mode. The **Deferred** mode means in the background when the **Upload Request Periodic Monitor (C1-UPLRQ)** batch is executed. You can configure the **Upload Request Periodic Monitor (C1-UPLRQ)** batch such that it is executed at regular intervals. For more information about the batch, see *Oracle Revenue Management and Billing Batch Guide*. This field appears when you are creating an upload request type using the **C1-AdjRequestType** business object.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
Entity Business Object	Used to indicate the business object using which you want to create or update the entities through the respective upload request. You must use the following entity business object for the respective upload request type: • While defining an accounts' bill cycle update upload request type, you must set the entity business object to **C1-AccountBO**. • While defining a bill group derivation and pricing parameters record creation upload request type, you must set the entity business object to **C1-BillLevel**. • While defining a bill group sort record creation upload request type, you must set the entity business object to **C1-BillingGroupSortId**. • While defining a billable charge creation upload request type, you must set the entity business object to **C1-BILLCHARGE**. • While defining a contract rider update upload request type, you must set the entity business object to **C1_SA**. • While defining a hold request creation upload request type, you must set the entity business object to **C1-HoldRequest**. • While defining a refund request creation upload request type, you must set the entity business object to **C1-RefundReq**. • While defining a policy reinstatement upload request type, you must set the entity business object to **C1-POLICY**. • While defining a write off request creation upload request type, you must set the entity business object to **C1-WORequest**. • While defining a bill cycle rule characteristic creation or modification upload request type, you must set the entity business object to **C1-AccountBO**.	No

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The **Search** (🔍) icon appears corresponding to the **Entity Business Object** field. On clicking the **Search** icon, the **Business Object Search** window appears. This field appears when you are creating an upload request type using the **C1-UplRequestType** business object. The **Upload Request** feature enables you to upload business object based entities and non business object based entities in the system. If you want to create business object based entities through the respective upload request, you need to specify the entity business object in the upload request type. However, if you want to create non business object based entities (i.e., entities created via any business service) through the respective upload request, you do not need to specify the entity business object in the upload request type. For example, while defining a payment tender cancellation upload request type, you do not need to specify the entity business object.	
Approval Required	Used to indicate whether approval is required while creating or updating entities through the respective upload request.	No
Approval To Do Type	Used to indicate that the To Do entry of the specified To Do type must be created when an upload request is submitted for approval. **Note:** The **Search** (🔍) icon appears corresponding to the **Approval To Do Type** field. On clicking the **Search** icon, the **To Do Type Search** window appears. On specifying the To Do type, the description of the To Do type appears corresponding to the **Approval To Do Type** field. This field appears when the **Approval Required** option is selected. You can use the respective To Do type mentioned in the prerequisites or a custom To Do type, if required.	Yes (Conditional) **Note:** This field is required when the **Approval Required** option is selected.
Approval To Do Role	Used to indicate that users with the specified To Do role can only approve an upload request which is submitted for approval.	Yes (Conditional)

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The list includes only those To Do roles which are associated with the approval To Do type. This field appears when the **Approval Required** option is selected.	**Note:** This field is required when the **Approval Required** option is selected.
FK Reference Code	Used to indicate the foreign key reference using which you want to display information about the entity once it is created through an upload request. **Note:** If the foreign key reference is specified in the upload request type, the system displays the entity information for the respective upload requests in the **Data Records** zone of the **Upload Request** screen once the entity is created (i.e., once the upload request is processed). However, if the foreign key reference is not specified in the upload request type, the system does not display the entity information for the respective upload requests. The **Search** (🔍) icon appears corresponding to the **FK Reference Code** field. On clicking the **Search** icon, the **Foreign Key Search** window appears. This field appears when you are creating an upload request type using the **C1-UplRequestType** business object.	No

Tip: Alternatively, you can click the **Edit** button in the **Upload Request Type** zone to edit the details of the upload request type.

5. Modify the required details in the **Main** section.
6. Define, edit, or remove a match type from the adjustment upload request type, if required.
7. Define, edit, or remove characteristics of the upload request type, if required.
8. Click **Save**.
   The changes made to the upload request type are saved.

Related Topics

For more information on...	See...
Upload Request Type screen	Upload Request Type on page 1399
Upload Request Type List zone	Upload Request Type List on page 1400
Upload Request Type zone	Upload Request Type on page 1401
How to define a match type for an adjustment upload request type	Associating a Match Type with an Adjustment Upload Request Type on page 1413
How to define a characteristic for an upload request type	Defining a Characteristic for an Upload Request Type on page 1415

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Copying an Upload Request Type

Instead of creating an upload request type from scratch, you can create a new upload request type using an existing upload request type. This is possible through copying an upload request type. On copying an upload request type, the details including the match types (only for adjustments) and characteristics are copied to the new upload request type. You can then edit the details, if required.

Note: While copying an upload request type, the system does not copy the mapping details from the original upload request type to the new upload request type. You need to manually define the mapping details for the new upload request type.

Prerequisites

To copy an upload request type, you should have:

If you want to copy...	Then, you should have...
An adjustment upload request type	• An adjustment upload request type (whose copy you want to create) defined in the application • Upload request business objects defined in the application • A defer algorithm created using the **C1-UPLDEFEVL** algorithm type in the application • Required To Do role assigned to the **C1-ADJUP** To Do type in the application • An algorithm created using the **C1-MTCIALG** or **C1-MTCTALG** algorithm type in the application depending on the match type using which you want to create the adjustments
An accounts' bill cycle update upload request type	• An accounts' bill cycle update upload request type (whose copy you want to create) defined in the application • Upload request business objects defined in the application • Required To Do role assigned to the **C1-BCUUR** To Do type in the application • Required entity business object (for example, C1-AccountBO) defined in the application • Required foreign key reference for the account (for example, C1-ACCT) defined in the application

A bill group derivation and pricing parameters record creation upload request type	• Upload request type business objects defined in the application
	• Upload request business objects defined in the application
	• An approval To Do type named **C1-BGDVP** created with the following specifications:
	  • **Navigation Option** - c1upldrqTabMenu
	  • **Sort Key** - Upload Request ID
	  • **Drill Key Table** - C1_UPLOAD_REQ
	  • **Drill Key Field** - UPLOAD_REQ_ID
	• Required To Do role assigned to the **C1-BGDVP** To Do type in the application
	• Required entity business object (for example, C1-BillLevel) defined in the application
	• Required foreign key reference for the bill group (i.e., person) defined in the system.

A bill group sort record creation upload request type	• Upload request type business objects defined in the application • Upload request business objects defined in the application

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If you want to copy...	Then, you should have...

	• An approval To Do type named **C1-BGSRT** created with the following specifications:
	  • **Navigation Option** - c1upldrqTabMenu
	  • **Sort Key** - Upload Request ID
	  • **Drill Key Table** - C1_UPLOAD_REQ
	  • **Drill Key Field** - UPLOAD_REQ_ID
	• Required To Do role assigned to the **C1-BGSRT** To Do type in the application
	• Required entity business object (for example, C1-BillingGroupSortId) defined in the application
	• Required foreign key reference for the bill group (i.e., person) defined in the system.

A billable charge creation upload request type (for the fully insured group and individual lines of business)	• A billable charge creation upload request type (whose copy you want to create) defined in the application • Upload request business objects defined in the application • Required To Do role assigned to the **C1-BCUR** To Do type in the application • Required entity business object (for example, C1-BILLCHARGE) defined in the application • Required foreign key reference for the billable charge (for example, C1-BCHIN) defined in the application
A contract rider update upload request type	• A contract rider update upload request type (whose copy you want to create) defined in the application • Upload request business objects defined in the application • Required To Do role assigned to the **C1-CRUUR** To Do type in the application • Required entity business object (for example, C1_SA) defined in the application • Required foreign key reference for the contract defined in the application
A hold request creation upload request type	• A hold request creation upload request type (whose copy you want to create) defined in the application • Upload request business objects defined in the application • Required To Do role assigned to the **C1-HLDUR** To Do type in the application • Required entity business object (for example, C1-HoldRequest) defined in the application • Required foreign key reference for the hold request (for example, C1-HLDRE) defined in the application
A refund request creation upload request type	• A refund request creation upload request type (whose copy you want to create) defined in the application • Upload request business objects defined in the application • Required To Do role assigned to the **C1-REFUR** To Do type in the application • Required entity business object (for example, C1-RefundReq) defined in the application • Required foreign key reference for the refund request (for example, C1-REFWO) defined in the application
A policy reinstatement upload request type	• A policy reinstatement upload request type (whose copy you want to create) defined in the application • Upload request business objects defined in the application • Required To Do role assigned to the **C1-RPUR** To Do type in the application

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If you want to copy...	Then, you should have...
	• Required entity business object (for example, C1-POLICY) defined in the application • Required foreign key reference for the policy (for example, C1-POLCY) defined in the application
A payment tender cancellation upload request type	• A payment tender cancellation upload request type (whose copy you want to create) defined in the application • Upload request business objects defined in the application • Required To Do role assigned to the **C1-TNDCL** To Do type in the application • Required foreign key reference for the payment event (for example, C1-PEVT) defined in the application
A write off request creation upload request type	• A write off request creation upload request type (whose copy you want to create) defined in the application • Upload request business objects defined in the application • Required To Do role assigned to the **C1-WOUR** To Do type in the application • Required entity business object (for example, C1-WORequest) defined in the application • Required foreign key reference for the write off request (for example, C1-REFWO) defined in the application
A bill cycle rule characteristic creation or modification upload request type	• A bill cycle rule characteristic creation or modification upload request type (whose copy you want to create) defined in the application • Upload request business objects defined in the application • Required To Do role assigned to the **C1-BCRUR** To Do type in the application • Required entity business object (for example, C1-AccountBO) defined in the application • Required foreign key reference for the account (for example, C1-ACCT) defined in the application

Procedure

To copy an upload request type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **U** and then click **Upload Request Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Upload Request Type** sub-menu.
   The **Upload Request Type** screen appears.
4. In the **Upload Request Type List** zone, click the **Duplicate**(⧉) icon in the **Duplicate** column *c*orresponding to the upload request type whose copy you want to create.

   The **Upload Request Type** screen appears. It contains the following sections:

   - **Main** - Used to specify the basic details for the upload request type.
   - **Adjustment Match Type** - Used to specify the match type using which you want to create adjustments for the respective adjustment upload requests.

     Note: This section appears when you are creating an upload request type using the **C1-AdjRequestType** business object.

   - **Characteristics** - Used to define the characteristics for the upload request type.

   The **Main** section contains the following fields:

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Field Name	Field Description	Mandatory (Yes or No)
Upload Request Type	Used to specify the upload request type.	Yes
Upload Request Type Business Object	Indicates the business object using which you are defining the upload request type.	Not applicable
Upload Request Business Object	Used to indicate the business object using which you want to create the respective upload request. If you are creating an upload request type using the **C1-AdjRequestType** business object, the valid value is: • **Adjustment Upload Request (i.e., C1-ADJUPLD)** - Enables you to maintain an adjustment upload request. However, if you are creating an upload request type using the **C1-UplRequestType** business object, the valid values are: • **Bill Cycle Update Upload (i.e., C1-BillCycleUpdateUplReq)** - Enables you to maintain an accounts' bill cycle update upload request. • **Bill Group Derivation & Pricing Parameter (i.e., C1-BillLevelUploadRequest)** - Enables you to maintain a bill group derivation and pricing parameters record creation upload request. • **Bill Group Sorting Upload Request (i.e., C1-BillGrpSortUploadRequest)** - Enables you to maintain a bill group sort record creation upload request. • **Billable Charge Upload for Fully Insured (i.e., C1-BillableChargeUploadFI)** - Enables you to maintain a billable charge creation upload request. Note that this business object is only applicable for the fully insured group and individual lines of health insurance business. • **Contract Rider Upload (i.e., C1-ContractRiderUpdateUplReq)** - Enables you to maintain a contract rider update upload request. • **Hold Request Upload (i.e., C1-HoldUploadRequest)** - Enables you to maintain a hold request creation upload request. • **Refund Request Upload (i.e., C1-RefundUploadRequest)** - Enables you to maintain a refund request creation upload request. • **Reinstatement Upload Request (i.e., C1-ReinstatementUploadRequest)** - Enables you to maintain a policy reinstatement upload request. • **Tender Cancelation Upload Request (i.e., C1-TndrCnclUploadRequest)** - Enables you	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	to maintain a payment tender cancellation upload request. • **Write Off Request Upload (i.e., C1-WriteOffUploadRequest)** - Enables you to maintain a write off request creation upload request. • **Bill Cycle Rule Characteristic Upload (i.e., C1-BillCycleRuleCharUpdUplReq)** - Enables you to maintain a bill cycle rule characteristic creation or modification upload request. **Note:** The above mentioned business objects are shipped with the product. The list includes those business objects which are created using the **Upload Request (Adjustment Upload)** (i.e., **C1-UPLREQ**) or **Upload Request** (i.e., **C1-UPLOADREQ**) maintenance object depending on the business object used to create the upload request type.	
Description	Used to specify the description for the upload request type.	Yes
Detailed Description	Used to specify additional information about the upload request type. **Note:** You can resize the text box depending on your requirement by clicking the **Resize Handle** (⇲) icon at the bottom right corner of the text box.	No
Status	Used to indicate the status of the upload request type. The valid values are: • Active • Inactive	Yes
File Size (KB)	Used to indicate the maximum file size limit (in kilobytes) while uploading files using the upload request type.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	Note: You must specify a positive integer value in this field. This field appears when you are creating an upload request type using the **C1-AdjRequestType** business object. By default, the maximum file size limit is set to 700 KB in all the business objects which are created using the **Upload Request** (i.e., **C1-UPLOADREQ**) maintenance object. Therefore, you don't need to explicitly set the maximum file size limit while defining an upload request type using the **C1-UplRequestType** business object.	
Defer Algorithm	Used to attach an algorithm that will be triggered when you click the **Create Adjustment** or **Approve** button. **Note:** The **Search** (🔍) icon appears corresponding to the **Defer Algorithm** field. On clicking the **Search** icon, the **Algorithm Search** window appears. You need to attach an algorithm created using the **C1-UPLDEFEVL** algorithm type to this field. This algorithm checks whether the number of records in the uploaded file exceeds the specified online record process limit. If the number of records in the uploaded file does not exceed the online record process limit, the system creates the adjustments in the real time (i.e., immediately). However, if the number of records in the uploaded file exceeds the online record process limit, the system creates the adjustments in the deferred mode. The **Deferred** mode means in the background when the **Upload Request Periodic Monitor (C1-UPLRQ)** batch is executed. You can configure the **Upload Request Periodic Monitor (C1-UPLRQ)** batch such that it is executed at regular intervals. For more information about the batch, see *Oracle Revenue Management and Billing Batch Guide*. This field appears when you are creating an upload request type using the **C1-AdjRequestType** business object.	Yes
Entity Business Object	Used to indicate the business object using which you want to create or update the entities through the respective upload request. You must use the	No

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Field Name	Field Description	Mandatory (Yes or No)
	following entity business object for the respective upload request type: • While defining an accounts' bill cycle update upload request type, you must set the entity business object to **C1-AccountBO**. • While defining a bill group derivation and pricing parameters record creation upload request type, you must set the entity business object to **C1-BillLevel**. • While defining a bill group sort record creation upload request type, you must set the entity business object to **C1-BillingGroupSortId**. • While defining a billable charge creation upload request type, you must set the entity business object to **C1-BILLCHARGE**. • While defining a contract rider update upload request type, you must set the entity business object to **C1_SA**. • While defining a hold request creation upload request type, you must set the entity business object to **C1-HoldRequest**. • While defining a refund request creation upload request type, you must set the entity business object to **C1-RefundReq**. • While defining a policy reinstatement upload request type, you must set the entity business object to **C1-POLICY**. • While defining a write off request creation upload request type, you must set the entity business object to **C1-WORequest**. • While defining a bill cycle rule characteristic creation or modification upload request type, you must set the entity business object to **C1-AccountBO**.	

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The **Search** (🔍) icon appears corresponding to the **Entity Business Object** field. On clicking the **Search** icon, the **Business Object Search** window appears. This field appears when you are creating an upload request type using the **C1-UplRequestType** business object. The **Upload Request** feature enables you to upload business object based entities and non business object based entities in the system. If you want to create business object based entities through the respective upload request, you need to specify the entity business object in the upload request type. However, if you want to create non business object based entities (i.e., entities created via any business service) through the respective upload request, you do not need to specify the entity business object in the upload request type. For example, while defining a payment tender cancellation upload request type, you do not need to specify the entity business object.	
Approval Required	Used to indicate whether approval is required while creating or updating entities through the respective upload request.	No
Approval To Do Type	Used to indicate that the To Do entry of the specified To Do type must be created when an upload request is submitted for approval. **Note:** The **Search** (🔍) icon appears corresponding to the **Approval To Do Type** field. On clicking the **Search** icon, the **To Do Type Search** window appears. On specifying the To Do type, the description of the To Do type appears corresponding to the **Approval To Do Type** field. This field appears when the **Approval Required** option is selected. You can use the respective To Do type mentioned in the prerequisites or a custom To Do type, if required.	Yes (Conditional) **Note:** This field is required when the **Approval Required** option is selected.
Approval To Do Role	Used to indicate that users with the specified To Do role can only approve an upload request which is submitted for approval.	Yes (Conditional)

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The list includes only those To Do roles which are associated with the approval To Do type. This field appears when the **Approval Required** option is selected.	**Note:** This field is required when the **Approval Required** option is selected.
FK Reference Code	Used to indicate the foreign key reference using which you want to display information about the entity once it is created through an upload request. **Note:** If the foreign key reference is specified in the upload request type, the system displays the entity information for the respective upload requests in the **Data Records** zone of the **Upload Request** screen once the entity is created (i.e., once the upload request is processed). However, if the foreign key reference is not specified in the upload request type, the system does not display the entity information for the respective upload requests. The **Search** (🔍) icon appears corresponding to the **FK Reference Code** field. On clicking the **Search** icon, the **Foreign Key Search** window appears. This field appears when you are creating an upload request type using the **C1-UplRequestType** business object.	No

Tip: Alternatively, you can click the **Duplicate** button in the **Upload Request Type** zone to create a copy of the upload request type.

5. Enter the required details in the **Main** section.
6. Define, edit, or remove a match type from the adjustment upload request type, if required.
7. Define, edit, or remove characteristics of the upload request type, if required.
8. Click **Save**.
   The new upload request type is defined.

Related Topics

For more information on...	See...
Upload Request Type screen	Upload Request Type on page 1399
Upload Request Type List zone	Upload Request Type List on page 1400
Upload Request Type zone	Upload Request Type on page 1401
How to define a match type for an adjustment upload request type	Associating a Match Type with an Adjustment Upload Request Type on page 1413
How to define a characteristic for an upload request type	Defining a Characteristic for an Upload Request Type on page 1415

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Mapping Data and Configuring Filters for an Upload Request Type

The **Upload Request Mapping** screen enables you to do the following:

- **Map the Data of the CSV File** - To read the data from a Comma-Separated Values (CSV) file, you need to map its columns with the schema of the upload request business object. The system will then store the data in the respective tags of the upload request business object schema. While mapping the columns with the schema, you need to specify the column headers that would appear in the CSV file. The system will then create the XML tags by converting the column header into camelCase after removing the spaces from the column header. For example, if the header in the CSV file is Account Id, then the corresponding XML tag formed by the system is accountId. The system will then store the data from the column in the respective tag of the upload request business object schema.

  Note: You need to map the columns of the CSV file in the sequence as mentioned in the respective CSV format.

- **Configure the Search Filters** - The system enables you to configure maximum 10 search filters for an upload request type. It then displays the search filters (in the specified sequence) in the **Data Records** zone of the **Upload Request** screen while viewing the details of the respective upload requests.

Once an upload request is created using an upload request type, you cannot change the mapping details and search filters of the upload request type. In addition, while copying an upload request type, the system does not copy the mapping details and search filters from the original upload request type to the new upload request type. You need to manually define the mapping details and search filters for the new upload request type.

Note: This screen is applicable only for an upload request type which is created using the **C1-UplRequestType** business object and not for an upload request type which is created using the**C1-AdjRequestType** business object.

Procedure

To map the data and configure search filters for an upload request type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **U** and then click **Upload Request Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Upload Request Type** sub-menu.
   The **Upload Request Type** screen appears.
4. In the **Upload Request Type List** zone, click the **Mapping**(🔗) icon in the **Mapping** column corresponding *t*o the upload request type whose details you want to edit.

   The **Upload Request Mapping** screen appears. It contains the following field:

Field Name	Field Description
Upload Request Type	Displays the description of the upload request type.

   In addition, it contains the following columns:

Column Name	Column Description	Mandatory (Yes or No)
CSV Column Header	Used to specify the column header of a CSV file that you would upload using the upload request type.	Yes
Searchable	Used to indicate whether you want to create a field for the column header and provide the ability to filter the data records using it. The system will then accordingly display the fields and columns in the **Data Records** zone of the **Upload Request** screen.	Yes (Conditional) **Note:** This field is required when you are configuring a search filter for the upload request type.

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Column Name	Column Description	Mandatory (Yes or No)
	Note: You can select this option for maximum 10 column headers in the upload request type.	
Sequence	Used to indicate the order in which you want to display the corresponding fields and columns in the **Data Records** zone of the **Upload Request** screen. **Note:** You must specify a positive integer value in this field.	Yes

5. Enter the required details in **Upload Request Mapping** screen.

Note: If you want to add more than one column header, click the **Add** (+) icon and then specify the details. However, if you want to remove a column header, click the **Delete** (🗑) icon corresponding to the column header.

6. Click **Save**.
   The mapping details are saved for the upload request type.

Related Topics

For more information on...	See...
Upload Request Type screen	Upload Request Type on page 1399
Upload Request Type List zone	Upload Request Type List on page 1400
Mass Accounts' Bill Cycle Update CSV Format	Mass Accounts' Bill Cycle Update CSV Format on page 2025
Mass Contract Rider Update CSV Format	Mass Contract Rider Update CSV Format on page 2031
Mass Hold Request Creation CSV Format	Mass Hold Request Creation CSV Format on page 2040
Mass Refund Request Creation CSV Format	Mass Refund Request Creation CSV Format on page 2056
Mass Write Off Request Creation CSV Format	Mass Write Off Request Creation CSV Format on page 2065
Mass Policy Reinstatement CSV Format	Mass Policy Reinstatement CSV Format on page 2074
Mass Bill Group Sort Record Creation CSV Format	Mass Bill Group Sort Record Creation CSV Format on page 2080
Mass Bill Group Derivation and Pricing Parameters Record Creation CSV Format	Mass Bill Group Derivation and Pricing Parameters Record Creation CSV Format on page 2089
Mass Billable Charge Creation CSV Format (Fully Insured Group)	Mass Billable Charge Creation CSV Format (Fully Insured Group) on page 2101
Mass Billable Charge Creation CSV Format (Fully Insured Individual)	Mass Billable Charge Creation CSV Format (Fully Insured Individual) on page 2107
Mass Payment Tender Cancellation CSV Format	Mass Payment Tender Cancellation CSV Format on page 2119
Mass Bill Cycle Rule Characteristic Creation or Modification CSV Format	Mass Bill Cycle Rule Characteristic Creation or Modification CSV Format on page 2126

Deleting an Upload Request Type

Procedure

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To delete an upload request type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **U** and then click **Upload Request Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Upload Request Type** sub-menu.
   The **Upload Request Type** screen appears.
4. In the **Upload Request Type List** zone, click the **Delete** (🗑) icon in the **Delete** column corresponding to the *u*pload request type that you want to delete.

   A message appears confirming whether you want to delete the upload request type.

   Note: You can delete an upload request type only when an upload request is not yet created using the upload request type.

   Tip: Alternatively, you can click the **Delete** button in the **Upload Request Type** zone to delete the upload request type.
5. Click **OK**.
   The upload request type is deleted.

Related Topics

For more information on...	See...
Upload Request Type screen	Upload Request Type on page 1399
Upload Request Type List zone	Upload Request Type List on page 1400
Upload Request Type zone	Upload Request Type on page 1401

Viewing the Upload Request Type Details

Procedure

To view the details of an upload request type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **U** and then click **Upload Request Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Upload Request Type** sub-menu.
   The **Upload Request Type** screen appears.
4. In the **Upload Request Type List** zone, click the **Broadcast** (📡) icon corresponding to the upload request type *w*hose details you want to view.
   The **Upload Request Type** zone appears.
5. View the details of the upload request type in the **Upload Request Type** zone.

Related Topics

For more information on...	See...
Upload Request Type screen	Upload Request Type on page 1399
Upload Request Type List zone	Upload Request Type List on page 1400

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For more information on...	See...
Upload Request Type zone	Upload Request Type on page 1401

Upload Request (Used for Searching)

The **Upload Request** screen allows you to search for an upload request using various search criteria. It also allows you to create an upload request. It contains the following zone:

- Search Upload Request on page 2165

Through this screen, you can navigate to the following screen:

- Upload Request (Used for Viewing) on page 2173

Search Upload Request

The **Search Upload Request** zone allows you to search for an upload request using various search criteria. It contains the following two sections:

- **Search Criteria** - The **Search Criteria** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Search By	Used to indicate whether you want to search for an upload request using the request details. The valid value is: • Request Details **Note:** By default, the **Request Details** option is selected.	Yes
Upload Date From	Used to search for upload requests which are created from a particular date onwards. **Note:** You can either manually specify the date or select it using the **Date Picker** ( ) icon corresponding to the field.	No
Status	Used to search for upload requests with a particular status. The valid values are: • Approval In Progress • Canceled • Deferred Processing • Deferred Validation • Draft • Processed • Rejected • Validated • Validating	No

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Field Name	Field Description	Mandatory (Yes or No)
To	Used to search for upload requests which are created till a particular date. **Note:** You can either manually specify the date or select it using the **Date Picker** ( ) icon corresponding to the field.	No
User ID	Used to search for upload requests which are created by a particular user.	No
Upload Request Type	Used to search for upload requests which are created using a particular upload request type. **Note:** The list includes only those upload request types which are created using the **C1-UplRequestType** business object and are in the **Active** status.	No
File Name	Used to search for an upload request through which a particular file is uploaded.	No
Upload Request ID	Used to search for a particular upload request.	No

Note: You must specify at least one search criterion while searching for an upload request.

- **Search Results** - On clicking the **Search** button, the search results appear based on the specified search criteria. The **Search Results** section contains the following columns:

Column Name	Column Description
Upload Date	Displays the date and time when the upload request is created.
Upload Request Information	Displays information about the upload request. **Note:** It has a link. On clicking the link, the **Upload Request** screen appears where you can view the details of the respective upload request. This information string is generated through the **C1-UPLRQ-INF** algorithm attached to the **Information** system event of the **C1-UPLOADREQ** maintenance object. It concatenates the following fields — Upload Request Type Description, Upload Request Status Description, Upload Request ID.
Status	Indicates the status of the upload request. The valid values are: • Approval In Progress • Canceled • Deferred Processing • Deferred Validation • Draft • Processed • Rejected • Validated • Validating

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Column Name	Column Description
Upload Request Type	Indicates the upload request type using which the upload request is created.
Entity Business Object	Indicates the business object using which the entities should be created or updated through the upload request. In addition, a context menu (⊙) icon appears corresponding to this field which helps in navigating to other screens in the application. **Note:** It has a link. On clicking the link, the **Business Object** screen appears where you can view the details of the respective business object.
File Name	Indicates the file uploaded through the upload request.
Total Records	Indicates the total number of records uploaded through the CSV file.
Created By	Indicates the user who has created the upload request.

Note: Pagination is used to display limited number of records in the **Search Results** section. You can use the navigation links, such as **Previous** and **Next** to navigate between pages. Note that the navigation links appear in the **Search Results** section only when the records in the search results exceed 20.

Related Topics

For more information on...	See...
How to search for an upload request	Searching for an Upload Request on page 2167
How to view the details of an upload request	Viewing the Upload Request Details on page 2168
How to create an upload request	Creating an Upload Request on page 2168

Searching for an Upload Request

Prerequisites

To search for an upload request, you should have:

- Upload request types created using the **C1-UplRequestType** business object in the **Active** status

Procedure

To search for an upload request:

1. Click the **Menu** link in the **Application** toolbar.
   A list appears.
2. From the **Main** menu, select **Tools** and then click **Upload Request**.
   A sub-menu appears.
3. Click the **Search** option from the **Upload Request** sub-menu.
   The **Upload Request** screen appears.
4. Enter the search criteria in the **Search Upload Request** zone.

Note: ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.

5. Click **Search**.

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A list of upload requests that meet the search criteria appears in the **Search Results** section.

Related Topics

For more information on...	See...
Upload Request screen	Upload Request (Used for Searching) on page 2165
Search Upload Request zone	Search Upload Request on page 2165

Viewing the Upload Request Details

Procedure

To view the details of an upload request:

1. Search for the upload request in the **Upload Request** screen.
2. In the **Search Results** section, click the link in the **Upload Request Information** column corresponding to *t*he upload request whose details you want to view.

   The **Upload Request** screen appears. It contains following tabs:

   - Upload Request - Main on page 2173
   - Upload Request - Log on page 2178
3. Ensure that the **Main** tab is selected.
4. View the details of the upload request in the **Upload Request** zone.
5. View the records uploaded through the CSV file in the **Data Records** zone.

Related Topics

For more information on...	See...
How to search for an upload request	Searching for an Upload Request on page 2167
Upload Request screen	Upload Request (Used for Viewing) on page 2173
Upload Request zone	Upload Request on page 2174
Data Records zone	Data Records on page 2176

Creating an Upload Request

Prerequisites

To create an upload request, you should have:

If you want to create...	Then, you should have...
An accounts' bill cycle update upload request	• An upload request type which is created using the **C1-UplRequestType** business object and where the upload request business object is set to **Bill Cycle Update Upload (i.e., C1-BillCycleUpdateUplReq)** and the status is set to **Active** • An accounts' bill cycle update file in the required CSV format

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If you want to create...	Then, you should have...
A bill group derivation and pricing parameters record creation upload request	• An upload request type which is created using the **C1-UplRequestType** business object and where the upload request business object is set to **Bill Group Derivation & Pricing Parameter (i.e., C1-BillLevelUploadRequest)** and the status is set to **Active** • A bill group derivation and pricing parameters record creation file in the required CSV format
A bill group sort record creation upload request	• An upload request type which is created using the **C1-UplRequestType** business object and where the upload request business object is set to **Bill Group Sorting Upload Request (i.e., C1-BillGrpSortUploadRequest)** and the status is set to **Active** • A bill group sort record creation file in the required CSV format
A billable charge creation upload request (for the fully insured group and individual lines of business)	• An upload request type which is created using the **C1-UplRequestType** business object and where the upload request business object is set to **Billable Charge Upload for Fully Insured (i.e., C1-BillableChargeUploadFI)** and the status is set to **Active** • A billable charge creation file in the required CSV format **Note:** Note that this upload request type would be applicable only for the fully insured group and individual lines of health insurance business.
A contract rider update upload request	• An upload request type which is created using the **C1-UplRequestType** business object and where the upload request business object is set to **Contract Rider Upload (i.e., C1-ContractRiderUpdateUplReq)** and the status is set to **Active** • A contract rider update file in the required CSV format
A hold request creation upload request	• An upload request type which is created using the **C1-UplRequestType** business object and where the upload request business object is set to **Hold Request Upload (i.e., C1-HoldUploadRequest)** and the status is set to **Active** • A hold request creation file in the required CSV format
A refund request creation upload request	• An upload request type which is created using the **C1-UplRequestType** business object and where the upload request business object is set to **Refund Request Upload (i.e., C1-RefundUploadRequest)** and the status is set to **Active** • A refund request creation file in the required CSV format
A policy reinstatement upload request	• An upload request type which is created using the **C1-UplRequestType** business object and where the upload request business object is set to **Reinstatement Upload Request (i.e., C1-ReinstatementUploadRequest)** and the status is set to **Active** • A policy reinstatement file in the required CSV format
A payment tender cancellation upload request	• An upload request type which is created using the **C1-UplRequestType** business object and where the upload request business object is set to **Tender Cancelation Upload Request (i.e., C1-TndrCnclUploadRequest)** and the status is set to **Active** • A payment tender cancellation file in the required CSV format

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If you want to create...	Then, you should have...
A write off request creation upload request	• An upload request type which is created using the **C1-UplRequestType** business object and where the upload request business object is set to **Write Off Request Upload (i.e., C1-WriteOffUploadRequest)** and the status is set to **Active** • A write off request creation file in the required CSV format
A bill cycle rule characteristic creation or modification upload request	• An upload request type which is created using the **C1-UplRequestType** business object and where the upload request business object is set to **Bill Cycle Rule Characteristic Upload (i.e., C1-BillCycleRuleCharUpdUplReq)** and the status is set to **Active** • A bill cycle rule characteristic creation or modification file in the required CSV format

Procedure

To create an upload request:

1. Click the **Menu** link in the **Application** toolbar.
   A list appears.
2. From the **Main** menu, select **Tools** and then click **Upload Request**.
   A sub-menu appears.
3. Click the **Add** option from the **Upload Request** sub-menu.

   The **Select Upload Request Type** screen appears. It contains the following field:

Field Name	Field Description	Mandatory (Yes or No)
Upload Request Type	Used to indicate the upload request type using which you want to create the upload request. **Note:** The list includes only those upload request types which are created using the **C1-UplRequestType** business object and are in the **Active** status.	Yes

Tip: Alternatively, you can access the **Select Upload Request Type** screen by clicking the **Upload** button in the **Page Title** area of the **Upload Request** screen.

4. Select the required upload request type from the respective field.
5. Click **OK**.

   The **Upload Request** screen appears. It contains the following sections:

   - **Main** - Used to specify the basic details for the upload request.
   - **Characteristics** - Used to define the characteristics for the upload request.

   The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Upload Request Type	Indicates the upload request type using which you want to create the upload request.	Not applicable

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Field Name	Field Description	Mandatory (Yes or No)
Parent Customer	Used to indicate the person for whom you want to create the bill group sort record creation or bill group derivation and pricing parameters record creation upload request. **Note:** This field appears when you are creating an upload request using an upload request type where the upload request business object is set to **C1-BillGrpSortUploadRequest** or **C1-BillLevelUploadRequest**. The system allows you to create a bill group sort record creation or bill group derivation and pricing parameters record creation upload request for a person whose person type is set to **Parent Customer**. The **Search** (🔍) icon appears corresponding to the **Parent Customer** field. On clicking the **Search** icon, the **Person Search** window appears.	Yes
File Name	Used to specify the Comma Separated Values (CSV) file that you want to upload. **Note:** You can click the **Choose File** button corresponding to the **File Name** field to browse and select the file that you want to upload. Note that you can upload a file from a local machine and not from the server location. The system does not allow you to upload a file which exceeds 700 KB. Therefore, you must ensure that the file size is within the maximum limit. The file name must be unique and should not exceed 60 characters. At least one record should be present in the file along with the column headers.	Yes
Replace Existing File	Used to indicate whether you want to replace any existing file in the system. You must select this option when you want to upload the same file once again. **Note:** You can upload a file once again only when the upload request with the same file is in the **Rejected** or **Canceled** status.	No
Comments	Used to specify additional information about the upload request.	No

6. Enter the required details in the **Main** section.
7. Click the **Choose File** button corresponding to the **File Name** field.
   The **Open** dialog box appears.
8. Browse to the location where the file that you want to upload is available in the system.
9. Click **Open**.
   The file name appears in the **File Name** field.

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10. Select the **Replace Existing File** option depending on whether you want to upload the same file once again in the system.
11. Define characteristics for the upload request, if required.
12. Click **Save**.
    A message appears indicating the number of records which are successfully uploaded. Then, the **Upload Request** screen appears where you can view the details of the upload request which is created in the **Draft** status. The status of the records is set to **Pending**. Note that if the mandatory data is missing in the record, the status of the record is set to **Invalid**.

Related Topics

For more information on...	See...
Upload Request screen	Upload Request (Used for Searching) on page 2165
How to define a characteristic for an upload request	Defining a Characteristic for an Upload Request on page 2172

Defining a Characteristic for an Upload Request

Prerequisites

To define a characteristic for an upload request, you should have:

- Characteristic types defined in the application (where the characteristic entity is set to **Upload Request**)

Procedure

To define a characteristic for an upload request:

1. Ensure that the **Characteristics** section is expanded when you are defining or editing an upload request.

   The **Characteristics** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Effective Date	Used to specify the date from when the characteristic is effective for the upload request.	Yes (Conditional)
	Note: You can either manually specify the date or select it using the **Date Picker** ( ) icon corresponding to the field.	**Note:** This field is required when you are defining a characteristic for the upload request.
Characteristic Type	Used to indicate the characteristic type.	Yes (Conditional)
	Note: The list includes only those characteristic types where the characteristic entity is set to **Upload Request**.	**Note:** This field is required when you are defining a characteristic for the upload request.
Characteristic Value	Used to specify the value for the characteristic type.	Yes (Conditional)

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Field Name	Field Description	Mandatory (Yes or No)
	Note: If you select a predefined characteristic type, the **Search** (🔍) icon appears corresponding to the **Characteristic Value** field. On clicking the **Search** icon, the **Predefined Characteristic Search** window appears. On specifying the value for a predefined characteristic type, the description of the characteristic value appears corresponding to the **Characteristic Value** field.	**Note:** This field is required when you are defining a characteristic for the upload request.

2. Enter the required details in the **Characteristics** section.
3. If you want to define more than one characteristic for the upload request, click the **Add** (+) icon and then *r*epeat step *2*.

Note: However, if you want to remove a characteristic from the upload request, click the **Delete** (🗑) icon corresponding to the characteristic.

Related Topics

For more information on...	See...
How to create an upload request	Creating an Upload Request on page 2168
How to edit an upload request	Editing an Upload Request on page 2178

Upload Request (Used for Viewing)

Once you create an upload request, the **Upload Request** screen allows you to:

- Edit the details of the upload request
- Delete the upload request
- View the details of the upload request
- Validate the upload request
- Cancel the upload request
- Submit the upload request
- Approve or reject the upload request
- View the details of a data record
- View the log of the upload request
- Add a log entry for the upload request

This screen consists of the following tabs:

- Upload Request - Main on page 2173
- Upload Request - Log on page 2178

Upload Request - Main

The **Main** tab displays information about the upload request. It contains the following zones:

- Upload Request on page 2174

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- Data Records on page 2176

Upload Request

The **Upload Request** zone displays the details of the upload request. It contains the following sections:

- **Main** - Displays the basic information about the upload request. It contains the following fields:

Field Name	Field Description
Upload Request Information	Displays information about the upload request.
Upload Request Type	Indicates the upload request type using which the upload request is created. **Note:** It has a link. On clicking the link, the **Upload Request Type** screen appears where you can view the details of the respective upload request type.
Status	Indicates the status of the upload request. The valid values are: • Approval In Progress • Canceled • Deferred Processing • Deferred Validation • Draft • Processed • Rejected • Validated • Validating
File Name	Indicates the file uploaded through the upload request.

- **Statistics** - Displays statistics related to the records of the upload request. It contains the following fields:

Field Name	Field Description
Total Records	Displays the total number of records uploaded from the CSV file through the upload request.
Pending Records	Displays the number of records where the mandatory data is available or successfully derived by the system.
Valid Records	Displays the number of records which are successfully validated by the system.
Invalid Records	Displays the number of records which could not be successfully validated by the system.
Error Records	Displays the number of records for which the respective entity could not be created in the system.
Processed Records	Displays the number of records for which the respective entity is successfully created in the system.

- **Record Actions** - Enables you to perform various actions on the upload request. It contains the following buttons:

Button Name	Button Description
Edit	Used to edit the details of the upload request. **Note:** The **Edit** button appears when the upload request is in the **Draft** or **Validated** status.

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Button Name	Button Description
Delete	Used to delete the upload request. **Note:** The **Delete** button appears when the upload request is in the **Draft** status.
Validate	Used to validate the upload request. **Note:** The **Validate** button appears when the upload request is in the **Draft** status.
Cancel	Used to cancel the upload request. **Note:** The **Cancel** button appears when the upload request is in the **Validated** status.
Submit	Used to submit the upload request. **Note:** The **Submit** button appears when the upload request is in the **Validated** status.
Approve	Used to approve the upload request. **Note:** The **Approve** button appears when the following conditions are met: • The upload request is in the **Approval In Progress** status. • A user with the approval To Do role is reviewing the upload request.
Reject	Used to reject the upload request. **Note:** The **Reject** button appears when the following conditions are met: • The upload request is in the **Approval In Progress** status. • A user with the approval To Do role is reviewing the upload request.

- **Record Information** - This section contains the following fields:

Field Name	Field Description
Business Object	Indicates the business object using which the upload request is created. In addition, a context menu (⊙) icon appears corresponding to this field which helps in navigating to other screens in the application. **Note:** It has a link. On clicking the link, the **Business Object** screen appears where you can view the details of the respective business object.
Status Date/Time	Displays the date and time when the upload request status is updated.
Create Date/Time	Displays the date and time when the upload request is created.

- **Characteristics** - Lists the characteristics of the upload request. It contains the following columns:

Column Name	Column Description
Effective Date	Indicates the date from when the characteristic is effective.
Characteristic Type	Indicates the characteristic type.

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Column Name	Column Description
Characteristic Value	Displays the value of the characteristic type.

Related Topics

For more information on...	See...
How to edit an upload request	Editing an Upload Request on page 2178
How to delete an upload request	Deleting an Upload Request on page 2179
How to validate an upload request	Validating an Upload Request on page 2180
How to cancel an upload request	Canceling an Upload Request on page 2181
How to submit an upload request	Submitting an Upload Request on page 2182
How to approve an upload request	Approving an Upload Request on page 2184
How to reject an upload request	Rejecting an Upload Request on page 2186

Data Records

The **Data Records** zone lists the records uploaded from the CSV file through the upload request. It contains the following two sections:

- **Search Criteria** - The **Search Criteria** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Search Criteria 1, Search Criteria 2, ..., Search Criteria 10 **Note:** We have used generic field labels here. However, these labels will change depending on the mapping defined in the respective upload request type.	Used to filter the records of the upload request.	No
Record Status	Used to search for data records with a particular status. The valid values are: • Error • Invalid • Pending • Processed • Valid	No

- **Search Results** - On clicking the **Search** button, the search results appear based on the specified search criteria. The **Search Results** section contains the following columns:

Column Name	Column Description
View	On clicking the **View** (🔗) icon, the **Data Record Details** window appears where you can view the details of the data record.

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Column Name	Column Description
Search Result 1, Search Result 2, ..., Search Result 10 **Note:** We have used generic field labels here. However, these labels will change depending on the mapping defined in the respective upload request type.	Displays the data of the record.
Record Status	Indicates the status of the data record. The valid values are: • Error • Invalid • Pending • Processed • Valid
Messages	Indicates the error that occurred while validating or processing the data record. **Note:** The data appears in this column only when the data record is in the **Invalid** or **Error** status.
Entity ID	Indicates the entity that is created for the data record through the upload request. **Note:** This column appears only when the upload request is created using an upload request type where the upload request business object is set to the **C1-BillLevelUploadRequest**, **C1-BillableChargeUploadFI**, **C1-ContractRiderUpdateUplReq**, or **C1-BillGrpSortUploadRequest** business object. The data appears in this column only when the following conditions are met: • The data record is in the **Processed** status. • The FK reference code is specified in the respective upload request type
Entity Information	Indicates the entity that is created for the data record through the upload request. **Note:** This column appears only when the upload request is created using an upload request type where the upload request business object is set to the **C1-HoldUploadRequest**, **C1-RefundUploadRequest**, **C1-WriteOffUploadRequest**, **C1-TndrCnclUploadRequest**,**C1-ReinstatementUploadRequest**,**C1-BillCycleRuleCharUpdUplReq**, or **C1-BillCycleUpdateUplReq** business object. The data appears in this column only when the following conditions are met: • The data record is in the **Processed** status. • The FK reference code is specified in the respective upload request type It has a link. On clicking the link, the respective entity screen appears where you can view the details of the entity.

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> **Note:** Pagination is used to display limited number of records in the **Search Results** section. You can use the navigation links, such as **Previous** and **Next** to navigate between pages. Note that the navigation links appear in the **Search Results** section only when the records in the search results exceed 20.

Related Topics

For more information on...	See...
How to view the details of a data record	Viewing the Details of a Data Record on page 2188

Upload Request - Log

The **Log** tab contains the following zone:

- Upload Request Log on page 2178

Upload Request Log

The **Upload Request Log** zone lists the complete trail of actions performed on the upload request. It contains the following columns:

Column Name	Column Description
Date/Time	Displays the date and time when the action was performed on the upload request.
Details	Displays the details about the action performed on the upload request.
User	Indicates the user who has performed the action on the upload request.
Log Type	Indicates the type of log.
Related Object	Indicates the object or entity which is created when the action is performed on the upload request. **Note:** At present, no data appears in this column. The implementation team can build the custom logic to meet the business requirements.
Status Reason	Indicates the reason why the upload request is rejected or canceled.

> **Note:** You can manually add a log entry for the upload request by clicking the **Add Log Entry** link in the upper right corner of the **Upload Request Log** zone.

Related Topics

For more information on...	See...
How to view the log of an upload request	Viewing the Log of an Upload Request on page 2188
How to add a log entry for an upload request	Adding a Log Entry for an Upload Request on page 2189

Editing an Upload Request

Procedure

To edit an upload request:

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1. Search for the upload request in the **Upload Request** screen.
2. In the **Search Results** section, click the link in the **Upload Request Information** column corresponding to *t*he upload request whose details you want to edit.
   The **Upload Request** screen appears.
3. Ensure that the **Main** tab is selected.
4. Click the **Edit** button in the **Upload Request** zone.

   The **Upload Request** screen appears. It contains the following sections:

   - **Main** - Used to specify the basic details for the upload request.
   - **Characteristics** - Used to define the characteristics for the upload request.

   The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Upload Request Type	Indicates the upload request type using which the upload request is created.	Not applicable
Parent Customer	Indicates the person for whom the bill group sort record creation or bill group derivation and pricing parameters record creation upload request is created. **Note:** This field appears when the upload request is created using an upload request type where the upload request business object is set to **C1-BillGrpSortUploadRequest** or **C1-BillLevelUploadRequest**.	Not applicable
File Name	Indicates the file uploaded through the upload request.	Not applicable
Comments	Used to specify additional information about the upload request.	No

Note: The **Edit** button appears when the upload request is in the **Draft** or **Validated** status.

5. Modify the required details in the **Main** section.
6. Define, edit, or remove characteristics of the upload request, if required.
7. Click **Save**.
   The changes made to the upload request are saved.

Related Topics

For more information on...	See...
How to search for an upload request	Searching for an Upload Request on page 2167
Upload Request screen	Upload Request (Used for Viewing) on page 2173
Upload Request zone	Upload Request on page 2174
How to define a characteristic for an upload request	Defining a Characteristic for an Upload Request on page 2172

Deleting an Upload Request

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Procedure

To delete an upload request:

1. Search for the upload request in the **Upload Request** screen.
2. In the **Search Results** section, click the link in the **Upload Request Information** column corresponding to *t*he upload request that you want to delete.
   The **Upload Request** screen appears.
3. Ensure that the **Main** tab is selected.
4. Click the **Delete** button in the **Upload Request** zone.
   A message appears confirming whether you want to delete the upload request.

   Note: The **Delete** button appears when the upload request is in the **Draft** status.
5. Click **OK**.
   The upload request is deleted.

Related Topics

For more information on...	See...
How to search for an upload request	Searching for an Upload Request on page 2167
Upload Request screen	Upload Request (Used for Viewing) on page 2173
Upload Request zone	Upload Request on page 2174

Validating an Upload Request

Procedure

To validate an upload request:

1. Search for the upload request in the **Upload Request** screen.
2. In the **Search Results** section, click the link in the **Upload Request Information** column corresponding to *t*he upload request that you want to validate.
   The **Upload Request** screen appears.
3. Ensure that the **Main** tab is selected.
4. Click the **Validate** button in the **Upload Request** zone.

   If any validation fails, the status of the data record is changed to **Invalid**. However, if all the validations are successful, the status of the data record is changed to **Valid**. Once all the pending data records in the upload request are validated, the status of the upload request is changed to **Validated**.

   Note:

   The **Validate** button appears when the upload request is in the **Draft** status.

   If there are no pending records while validating an upload request, a message appears indicating that there are no records to be validated. In such case, you can only delete an upload request.

Related Topics

For more information on...	See...
How to search for an upload request	Searching for an Upload Request on page 2167
Upload Request screen	Upload Request (Used for Viewing) on page 2173

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For more information on...	See...
Upload Request zone	Upload Request on page 2174

Canceling an Upload Request

There might be situations when an incorrect CSV file is uploaded in the system. In such case, the system provides you with the ability to cancel the upload request. However, note that you can cancel an upload request only when it is in the **Validated** status.

Prerequisites

To cancel an upload request, you should have:

- Reasons defined for the **Canceled** status of the **C1-BillableChargeUploadFI**, **C1-BillCycleUpdateUplReq**, **C1-BillGrpSortUploadRequest**, **C1-BillLevelUploadRequest**, **C1-ContractRiderUpdateUplReq**, **C1-HoldUploadRequest**, **C1-RefundUploadRequest**, **C1-ReinstatementUploadRequest**, **C1-TndrCnclUploadRequest**, **C1-BillCycleRuleCharUpdUplReq**, and **C1-WriteOffUploadRequest** business objects in the **Status Reason** screen.

Procedure

To cancel an upload request:

1. Search for the upload request in the **Upload Request** screen.
2. In the **Search Results** section, click the link in the **Upload Request Information** column corresponding to the upload request that you want to cancel.
   The **Upload Request** screen appears.
3. Ensure that the **Main** tab is selected.
4. Click the **Cancel** button in the **Upload Request** zone.

   The **Cancel Reason** window appears. It contains following fields:

Field Name	Field Description	Mandatory (Yes or No)
Cancel Reason	Used to indicate the reason why you want to cancel the upload request. **Note:** The list includes only those reasons which are defined for the **Canceled** status of the respective business object (i.e., **C1-BillableChargeUploadFI**, **C1-BillCycleUpdateUplReq**, **C1-BillGrpSortUploadRequest**, **C1-BillLevelUploadRequest**, **C1-ContractRiderUpdateUplReq**, **C1-HoldUploadRequest**, **C1-RefundUploadRequest**, **C1-ReinstatementUploadRequest**, **C1-TndrCnclUploadRequest**, **C1-BillCycleRuleCharUpdUplReq**, and **C1-WriteOffUploadRequest**) through the **Status Reason** screen.	Yes
Comments	Used to specify additional information while canceling the upload request.	No

Note: The **Cancel** button appears when the upload request is in the **Validated** status.

5. Select the reason for canceling the upload request from the **Cancel Reason** list.

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6. Enter the comments (if any) while canceling the upload request in the respective field.
7. Click **Save**.
   The status of the upload request is changed to **Canceled**.

Related Topics

For more information on...	See...
How to search for an upload request	Searching for an Upload Request on page 2167
Upload Request screen	Upload Request (Used for Viewing) on page 2173
Upload Request zone	Upload Request on page 2174

Submitting an Upload Request

Procedure

To submit an upload request:

1. Search for the upload request in the **Upload Request** screen.
2. In the **Search Results** section, click the link in the **Upload Request Information** column corresponding to *t*he upload request that you want to submit.
   The **Upload Request** screen appears.
3. Ensure that the **Main** tab is selected.
4. Click the **Submit** button in the **Upload Request** zone.

   The system behaves in the following manner:

If...	Then...
The **Approval Required** option is selected in the respective upload request type	The status of the upload request is changed to **Approval In Progress**. A To Do is created using the To Do type (i.e., **C1-BCUUR**, **C1-BCUR**,**C1-CRUUR**, **C1-HLDUR**, **C1-REFUR**, **C1-RPUR**, **C1-BGSRT**, **C1-BGDVP**, **C1-TNDCL**, **C1-BCRUR**, or **C1-WOUR** depending on the upload request) specified in the **Approval To Do Type** field of the respective upload request type. It is then assigned to the users with the role specified in the **Approval To Do Role** field of the respective upload request type. In addition, a log entry is created for the upload request when the To Do is created for the approver.
The **Approval Required** option is not selected in the respective upload request type and the number of valid records in the upload request does not exceed the online record process limit (defined in the **C1-DEFERUPLD** algorithm)	The following entities are created or updated for the respective upload request: • **Accounts' Bill Cycle Update Upload Request** - On processing this upload request, the bill cycle of the respective accounts is updated. • **Bill Group Derivation and Pricing Parameters Upload Request** - On processing this upload request, the derivation and pricing parameters of the respective bill group and sort ID combination are updated. • **Bill Group Sort Record Creation Upload Request** - On processing this upload request, the sort ID is defined for the respective bill group. • **Billable Charge Creation Upload Request (Health Insurance)** - On processing this upload request, the billable charge is created

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If...	Then...
	against the contract at the group membership or individual membership level or at the policy plan level. • **Contract Rider Update Upload Request** - On processing this upload request, the contract rider information is updated for the respective contract. • **Hold Request Creation Upload Request** - On processing this upload request, the hold request is created for the respective entity. • **Refund Request Creation Upload Request** - On processing this upload request, the refund request is created for the respective account. • **Policy Reinstatement Upload Request** - On processing this upload request, the respective fully insured group policy is reinstated. • **Payment Tender Cancellation Upload Request** - On processing this upload request, the respective payment tenders, payments, and payment events are canceled. • **Write Off Request Creation Upload Request** - On processing this upload request, the write off request is created for the respective account. • **Bill Cycle Rule Characteristic Creation or Modification Upload Request** - On processing this upload request, the bill cycle rule characteristic is created or updated for the respective account. If the record is successfully processed, the status of the record is changed to **Processed**. However, if the record could not be processed successfully due to any reason, the status of the record is changed to **Error**. Finally, the status of the upload request is changed to **Processed**.
The **Approval Required** option is not selected in the respective upload request type and the number of valid records in the upload request exceeds the online record process limit (defined in the **C1-DEFERUPLD** algorithm)	The status of the upload request is changed to **Deferred Processing**. **Note:** You need to execute the **Upload Request Periodic Monitor** (**C1-UPLRQ**) batch. It considers the upload requests which are in the **Deferred Processing** status and then accordingly creates or updates the entities depending on the upload request (as mentioned above). If the record is successfully processed, the status of the record is changed to **Processed**. However, if the record could not be processed successfully due to any reason, the status of the record is changed to **Error**. Finally, the status of the upload request is changed to **Processed**.

Note:

The **Submit** button appears when the upload request is in the **Validated** status.

Related Topics

For more information on...	See...
How to search for an upload request	Searching for an Upload Request on page 2167
Upload Request screen	Upload Request (Used for Viewing) on page 2173

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For more information on...	See...
Upload Request zone	Upload Request on page 2174

Approving an Upload Request

You can view the number of upload requests which are pending for approval from the **Upload Request** screen. The approver can review, and accordingly approve or reject the upload request based on the observations.

Note: The system will not allow you to approve or reject an upload request submitted by you.

To approve an upload request, you should have:

- Required approval To Do role assigned in the system

Procedure

To approve an upload request:

1. Do either of the following:

If you want to...	Then...
Review an upload request through the Upload Request screen	**a.** Search for the upload request with the **Approval In Progress** status in the **Upload Request** screen. A list of upload requests with the respective status appears in the search results. **b.** In the **Search Results** section, click the link in the **Upload Request Information** column corresponding to the upload request which you want to review.
Review an upload request from the To Do List screen	**a.** Click the **Menu** link in the **Application** toolbar. A list appears. **b.** From the **Main** menu, select **To Do** and then click **To Do List**. The **To Do List** screen appears. **c.** Click the **Search** (🔍) icon corresponding to the **To Do Type** field. The **To Do Type for User Search** window appears. **d.** Enter the required To Do type in the **To Do Type** field. **e.** Click the **Search** button corresponding to the **To Do Type** field. The **To Do List** screen appears. **f.** Select the **Open** option from the **Filter by** list to view all unassigned To Dos. **g.** Click the link in the **Message** column corresponding to the To Do of the upload request that you want to review.

   The **Upload Request** screen appears.
2. Review the details in the **Upload Request** screen.
3. If the information in the upload request is accurate, click the **Approve** button in the **Upload Request** zone.

   The system behaves in the following manner:

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If...	Then...
The number of valid records in the upload request does not exceed the online record process limit (defined in the **C1-DEFERUPLD** algorithm)	The following entities are created or updated for the respective upload request: • **Accounts' Bill Cycle Update Upload Request** - On processing this upload request, the bill cycle of the respective accounts is updated. • **Bill Group Derivation and Pricing Parameters Upload Request** - On processing this upload request, the derivation and pricing parameters of the respective bill group and sort ID combination are updated. • **Bill Group Sort Record Creation Upload Request** - On processing this upload request, the sort ID is defined for the respective bill group. • **Billable Charge Creation Upload Request (Health Insurance)** - On processing this upload request, the billable charge is created against the contract at the group membership or individual membership level or at the policy plan level. • **Contract Rider Update Upload Request** - On processing this upload request, the contract rider information is updated for the respective contract. • **Hold Request Creation Upload Request** - On processing this upload request, the hold request is created for the respective entity. • **Refund Request Creation Upload Request** - On processing this upload request, the refund request is created for the respective account. • **Policy Reinstatement Upload Request** - On processing this upload request, the respective fully insured group policy is reinstated. • **Payment Tender Cancellation Upload Request** - On processing this upload request, the respective payment tenders, payments, and payment events are canceled. • **Write Off Request Creation Upload Request** - On processing this upload request, the write off request is created for the respective account. • **Bill Cycle Rule Characteristic Creation or Modification Upload Request** - On processing this upload request, the bill cycle rule characteristic is created or updated for the respective account. If the record is successfully processed, the status of the record is changed to **Processed**. However, if the record could not be processed successfully due to any reason, the status of the record is changed to **Error**. Finally, the status of the upload request is changed to **Processed**.
The number of valid records in the upload request exceeds the online record process limit (defined in the **C1-DEFERUPLD** algorithm)	The status of the upload request is changed to **Deferred Processing**.

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If...	Then...
	Note: You need to execute the **Upload Request Periodic Monitor** (**C1-UPLRQ**) batch. It considers the upload requests which are in the **Deferred Processing** status and then accordingly creates or updates the entities depending on the upload request (as mentioned above). If the record is successfully processed, the status of the record is changed to **Processed**. However, if the record could not be processed successfully due to any reason, the status of the record is changed to **Error**. Finally, the status of the upload request is changed to **Processed**.

Note:

The **Approve** button appears when the following conditions are met:

- The upload request is in the **Approval In Progress** status.
- A user with the approval To Do role is reviewing the upload request.

Related Topics

For more information on...	See...
How to search for an upload request	Searching for an Upload Request on page 2167
Upload Request screen	Upload Request (Used for Viewing) on page 2173
Upload Request zone	Upload Request on page 2174

Rejecting an Upload Request

Prerequisites

To reject an upload request, you should have:

- Required approval To Do role assigned in the system.
- Reasons defined for the **Rejected** status of the **C1-BillableChargeUploadFI**, **C1-BillCycleUpdateUplReq**, **C1-BillGrpSortUploadRequest**, **C1-BillLevelUploadRequest**, **C1-ContractRiderUpdateUplReq**, **C1-HoldUploadRequest**, **C1-RefundUploadRequest**, **C1-ReinstatementUploadRequest**, **C1-TndrCnclUploadRequest**, **C1-BillCycleRuleCharUpdUplReq**, and **C1-WriteOffUploadRequest** business objects in the **Status Reason** screen.

Note: The system will not allow you to approve or reject an upload request submitted by you.

Procedure

To reject an upload request:

1. Do either of the following:

If you want to...	Then...
Review an upload request through the Upload Request screen	**a.** Search for the upload request with the **Approval In Progress** status in the **Upload Request** screen. A list of upload requests with the respective status appears in the search results.

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If you want to...	Then...
	b. In the **Search Results** section, click the link in the **Upload Request Information** column corresponding to the upload request which you want to review.
Review an upload request from the To Do List screen	**a.** Click the **Menu** link in the **Application** toolbar. A list appears. **b.** From the **Main** menu, select **To Do** and then click **To Do List**. The **To Do List** screen appears. **c.** Click the **Search** (🔍) icon corresponding to the **To Do Type** field. The **To Do Type for User Search** window appears. **d.** Enter the required To Do type in the **To Do Type** field. **e.** Click the **Search** button corresponding to the **To Do Type** field. The **To Do List** screen appears. **f.** Select the **Open** option from the **Filter by** list to view all unassigned To Dos. **g.** Click the link in the **Message** column corresponding to the To Do of the upload request that you want to review.

The **Upload Request** screen appears.

2. Review the details in the **Upload Request** screen.
3. If the information in the upload request is incorrect, click the **Reject** button in the **Upload Request** zone.

   The **Reject Upload Request** window appears. It contains following fields:

Field Name	Field Description	Mandatory (Yes or No)
Status Reason	Used to indicate the reason why you want to reject the upload request. **Note:** The list includes only those reasons which are defined for the **Rejected** status of the respective business object (i.e., **C1-BillableChargeUploadFI**, **C1-BillCycleUpdateUplReq**, **C1-BillGrpSortUploadRequest**, **C1-BillLevelUploadRequest**, **C1-ContractRiderUpdateUplReq**, **C1-HoldUploadRequest**, **C1-RefundUploadRequest**, **C1-ReinstatementUploadRequest**, **C1-TndrCnclUploadRequest**, **C1-BillCycleRuleCharUpdUplReq**, and **C1-WriteOffUploadRequest**) through the **Status Reason** screen.	Yes
Comments	Used to specify additional information while rejecting the upload request.	No

Note:

The **Reject** button appears when the following conditions are met:

- The upload request is in the **Approval In Progress** status.
- A user with the approval To Do role is reviewing the upload request.

4. Select the reason for rejecting the upload request from the **Status Reason** list.
5. Enter the comments (if any) while rejecting the upload request in the respective field.
6. Click **Save**.

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The status of the upload request is changed to **Rejected**.

Related Topics

For more information on...	See...
How to search for an upload request	Searching for an Upload Request on page 2167
Upload Request screen	Upload Request (Used for Viewing) on page 2173
Upload Request zone	Upload Request on page 2174

Viewing the Details of a Data Record

Procedure

To view the details of a data record:

1. Search for the upload request in the **Upload Request** screen.
2. In the **Search Results** section, click the link in the **Upload Request Information** column corresponding to *t*he upload request whose details you want to view.
   The **Upload Request** screen appears.
3. Ensure that the **Main** tab is selected.
4. Filter the data records (if required) in the **Data Records** zone.
5. In the **Search Results** section, click the **View** (🔗) icon in the **View** column corresponding to the data record *w*hose details you want to view.

   The **Data Record Details** window appears. It contains the following columns:

Column Name	Column Description
Sr. No.	Indicates the order in which the data is received in the record.
CSV Column Header	Displays the column name of the CSV file.
CSV Column Value	Indicates the data received in the respective column.

6. View the details of the data record in the **Data Record Details** window.
7. Click **Close**.

Related Topics

For more information on...	See...
How to search for an upload request	Searching for an Upload Request on page 2167
Upload Request screen	Upload Request (Used for Viewing) on page 2173
Data Records zone	Data Records on page 2176

Viewing the Log of an Upload Request

Procedure

To view the log of an upload request:

1. Search for the upload request in the **Upload Request** screen.

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2. In the **Search Results** section, click the link in the **Upload Request Information** column corresponding to the *u*pload request whose details you want to view.
   The **Upload Request** screen appears.
3. Click the **Log** tab.
   The **Log** tab appears.
4. View the complete trail of actions performed on the upload request in the **Upload Request Log** zone.

Related Topics

For more information on...	See...
How to search for an upload request	Searching for an Upload Request on page 2167
Upload Request screen	Upload Request (Used for Viewing) on page 2173
Upload Request Log zone	Upload Request Log on page 2178
How to add a log entry for an upload request	Adding a Log Entry for an Upload Request on page 2189

Adding a Log Entry for an Upload Request

Procedure

To add a log entry for an upload request:

1. Search for the upload request in the **Upload Request** screen.
2. In the **Search Results** section, click the link in the **Upload Request Information** column corresponding to the *u*pload request for which you want to add a log entry.
   The **Upload Request** screen appears.
3. Click the **Log** tab.
   The **Log** tab appears.
4. Click the **Add Log Entry** link in the upper right corner of the **Upload Request Log** zone.

   The **Add Upload Request Log** window appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Upload Request Information	Displays information about the upload request.	Not applicable
Log Details	Used to specify additional comments for the upload request. **Note:** You can resize the text box depending on your requirement by clicking the **Resize Handle** (⟋) icon at the bottom right corner of the text box.	Yes

5. Enter the comments in the **Log Details** field.
6. Click **Save**.
   The log entry is added in the **Upload Request Log** zone.

Related Topics

For more information on...	See...
How to search for an upload request	Searching for an Upload Request on page 2167
Upload Request screen	Upload Request (Used for Viewing) on page 2173

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For more information on...	See...
Upload Request Log zone	Upload Request Log on page 2178

Chapter 30

General Ledger (GL) Accounting Template

Topics:

- GL Accounting Template (Without Approval) Status Transition
- GL Accounting Template (With Approval) Status Transition
- Algorithms Used in C1- GLAT
- Prerequisites
- GL Accounting Template (Used for Searching)
- GL Accounting Template (Used for Viewing)

Oracle Revenue Management and Billing until now created FT GL entries while generating the financial transactions for adjustments, payments, and bill segments. The FT GL entries were created using the distribution codes from the adjustment type, rate component, billable charge pass through line, or contract type depending on the type of financial transaction. Now, the system enables you to override the distribution code used for creating FT GL entries using the GL Accounting Template feature.

The system allows you to define a GL Accounting template for each process and sub processes combination for a date range. Based on the parameters defined in the **FT Generation** algorithms, the system either uses the standard process or GL Accounting Template for FT GL creation. The GL Accounting template for the specified process and sub processes combination which is effective on the accounting date is used for FT GL creation.

There should be at least one debit and credit lines in the GL Accounting template. You can define maximum 10 lines in the GL Accounting template. Each line should contain the following information:

- Whether the line should be used to create a debit FT GL entry or credit FT GL entry
- Conditional algorithm (created using the **C1-GLATLC** algorithm type) to indicate whether the line should be used to create the FT GL entry or not
- Distribution code to indicate the GL Account against which the FT GL entry should be created
- User defined amount, such as Amount 01, Amount 02, or Amount 03

The line with the Amount 01 user defined amount is used to create balancing FT GL entry against the contract type. The line with the Amount 02, Amount 03, …, and Amount 10 user defined amount is used to create FT GL entries for bill segment calculation lines, non-calculated adjustments, adjustment calculation lines, or payments. In case of bill segments and calculated adjustments, the lines with the Amount 02, Amount 03, …, Amount 10 user defined amount are mapped to calculation line amounts based on the rate component sequence.

You can optionally configure the system to use the approval workflow process while activating or deactivating the GL Accounting templates. If you want to enable the approval workflow process, you need to define algorithms using the following algorithm types:

- C1-GLATAPPEN
- C1-GLATSUB

If the **Approval Required (Y or N)** parameter in an algorithm created using the **C1-GLATSUB** algorithm type is set to **Y**, then on submitting or deactivating the GL Accounting template, the approval workflow process creates a To Do for the approver to review the GL Accounting template. Once the approver approves

a GL Accounting template, the status of the GL Accounting template is set to **Active** or **Inactive**.

We are supporting the following process and sub processes combinations while creating the GL Accounting template:

Process	**BS**	**AD**	**PS**
Sub Process 1	Contract Type	Adjustment Type	Bank Account
Sub Process 2	Division	Contract Type	Contract Type
Sub Process 3	Rate Schedule	Division	Division
Sub Process 4	-	-	-
Sub Process 5	-	-	-

For example, you can define the following the GL Accounting templates using the above supported process and sub processes combinations:

GL Accounting Template	**Process**	**Sub Process 1**	**Sub Process 2**	**Sub Process 3**
GLAT1	BS	CT1	D1	RS1
GLAT2	BS	CT2	D1	RS1
GLAT3	BS	CT3	D2	RS2
GLAT4	PS	BA1	CT1	D1
GLAT5	PS	BA2	CT2	D2
GLAT6	AD	AT1	CT1	D1
GLAT7	AD	AT1	CT2	D2

While creating the GL Accounting template for BS and AD processes, you need to ensure that the line with the Amount 1 user defined amount is a debit line. However, while creating the GL Accounting template for PS process, you need to ensure that the line with the Amount 1 user defined amount is a credit line.

Based on the customer requirements, you can define GL Accounting template for various custom process and sub processes combinations.

The **Create Additional FT GL Entries** parameter is added in the **Assign GL Account to Financial Transaction (C1-GLASN)** and **Assign GL Account to Financial Transaction (GLASSGN2)** batches. If you set this parameter to **Y**, the **C1-GLCE** algorithm is invoked. Based on the parameters defined in the algorithm, the system checks whether there is a GL Accounting template which is effective on the accounting date for the specified process and sub processes combination. If the effective GL Accounting template is available, the system creates additional FT GL entries for the financial transactions. If the financial transaction's currency is different from the division's base currency, the algorithm will create FT GL extension for the respective financial transaction.

Two new parameters are added in the **ADJT-NM**, **ADJT-AC**, **ADJT-TA**, **ADJT-TC**, **ADJT-AD**, **ADJT-GL**, **PSEG-NM**, **PSEG-AC**, **PSEG-CA**, **BSBF-BA**, **BSBF-LO** algorithm types:

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- **Use GL Accounting Template (Y or N)** - Indicates whether the FT GL entries should be created using the lines in the GL Accounting template. The valid values are **Y** and **N**.
- **Show the GL Accounting Template Error When Header Record Not Found (Y or N)** - Indicates whether you want to show error message when the effective GL Accounting template is not available for the process and sub processes combination. If you set the value of this parameter to **N**, the algorithm uses the standard process for FT GL creation when the effective GL Accounting template is not available.

The following table explains how the algorithms created using the following algorithm types create FT GL entries:

Algorithm Type	**Use GL Accounting Template (Y or N)**	**Calculated Adjustment Distribution Code Source (AT - Adjustment Type, CL - Calc Lines)**	**Algorithm Behaviour**
ADJT-NM, ADJT-AC, ADJT-TA, ADJT-TC, ADJT-AD, and ADJT-GL	N	CL	Creates FT GL for the adjustment calculation line using the distribution code on the respective rate component and the balancing FT GL using the distribution code on contract type.
ADJT-NM, ADJT-AC, ADJT-TA, ADJT-TC, ADJT-AD, and ADJT-GL	Y	CL	Creates debit and credit FT GL entries using the lines in the GL Accounting template.
ADJT-NM, ADJT-AC, ADJT-TA, ADJT-TC, ADJT-AD, and ADJT-GL	N	AT	Creates FT GL for the adjustment using the distribution code on the respective adjustment type and the balancing FT GL using the distribution code on contract type.
ADJT-NM, ADJT-AC, ADJT-TA, ADJT-TC, ADJT-AD, and ADJT-GL	Y	AT	Creates debit and credit FT GL entries using the lines in the GL Accounting template.

If the **Use GL Accounting Template (Y or N)** parameter is set to **N** in the algorithms created using the **PSEG-NM**, **PSEG-AC**, and **PSEG-CA** algorithm types, the system creates FT GL for the payment segment using the distribution code on the respective payment segment type and the balancing FT GL using the distribution code on contract type. However, if the **Use GL Accounting Template (Y or N)** parameter is set to **Y**, the system creates debit and credit FT GL entries using the lines in the GL Accounting template.

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If the **Use GL Accounting Template (Y or N)** parameter is set to **N** in the algorithms created using the **BSBF-BA** and **BSBF-LO** algorithm types, the system behaves in the following manner:

If the bill segment is...	**Then, the system...**
Created from a billable charge with SQI and/or price item details	Creates FT GL for the bill segment calculation line using the distribution code on the respective rate component and the balancing FT GL using the distribution code on contract type.
Created from a pass through billable charge	Creates FT GL for the pass through line using the distribution code on the respective pass through line and the balancing FT GL using the distribution code on contract type.
Created from a billable charge with pass through charges, SQI, and price item details	Creates... • FT GL for the bill segment calculation line using the distribution code on the respective rate component • FT GL for the pass through line using the distribution code on the respective pass through line • Balancing FT GL using the distribution code on contract type
A post processing bill segment	Creates FT GL for the post processing FT using the distribution code on the respective rate component and the balancing FT GL using the distribution code on contract type.

However, if the **Use GL Accounting Template (Y or N)** parameter is set to **Y** in the algorithms created using the **BSBF-BA** and **BSBF-LO** algorithm types, the system behaves in the following manner:

If the bill segment is...	**Then, the system...**
Created from a billable charge with SQI and/or price item details	Creates debit and credit FT GL entries using the lines in the GL Accounting template.
Created from a pass through billable charge	Does not use the GL Accounting template. It creates FT GL for the pass through line using the distribution code on the respective pass through line and the balancing FT GL using the distribution code on contract type.
Created from a billable charge with pass through charges, SQI, and price item details	Creates... • FT GL for bill segment calculation line using the lines in the GL Accounting template. • FT GL for the pass through line using the distribution code on the respective pass through line.

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If the bill segment is...	Then, the system...
	• Balancing FT GL using the line in the GL Accounting template.
A post processing bill segment	Creates debit and credit FT GL entries using the lines in the GL Accounting template.

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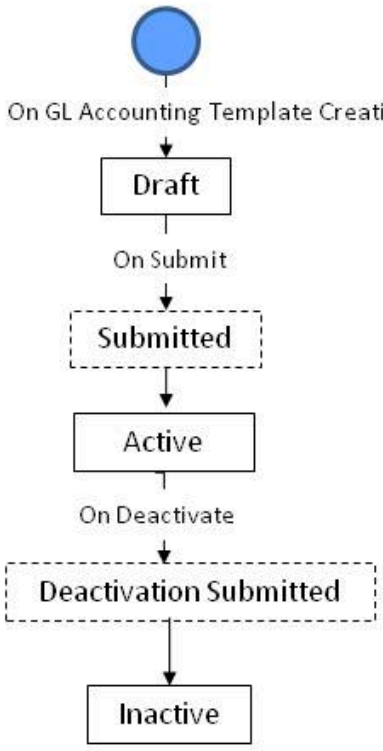
GL Accounting Template (Without Approval) Status Transition

The following figure graphically indicates how a GL accounting template moves from one status to another when the Approval Required (Y or N) parameter in the C1-GLATSUB algorithm is set to N.



GL Accounting Template (With Approval) Status Transition

The following figure graphically indicates how a GL accounting template moves from one status to another when the Approval Required (Y or N) parameter in the C1-GLATSUB algorithm is set to Y.

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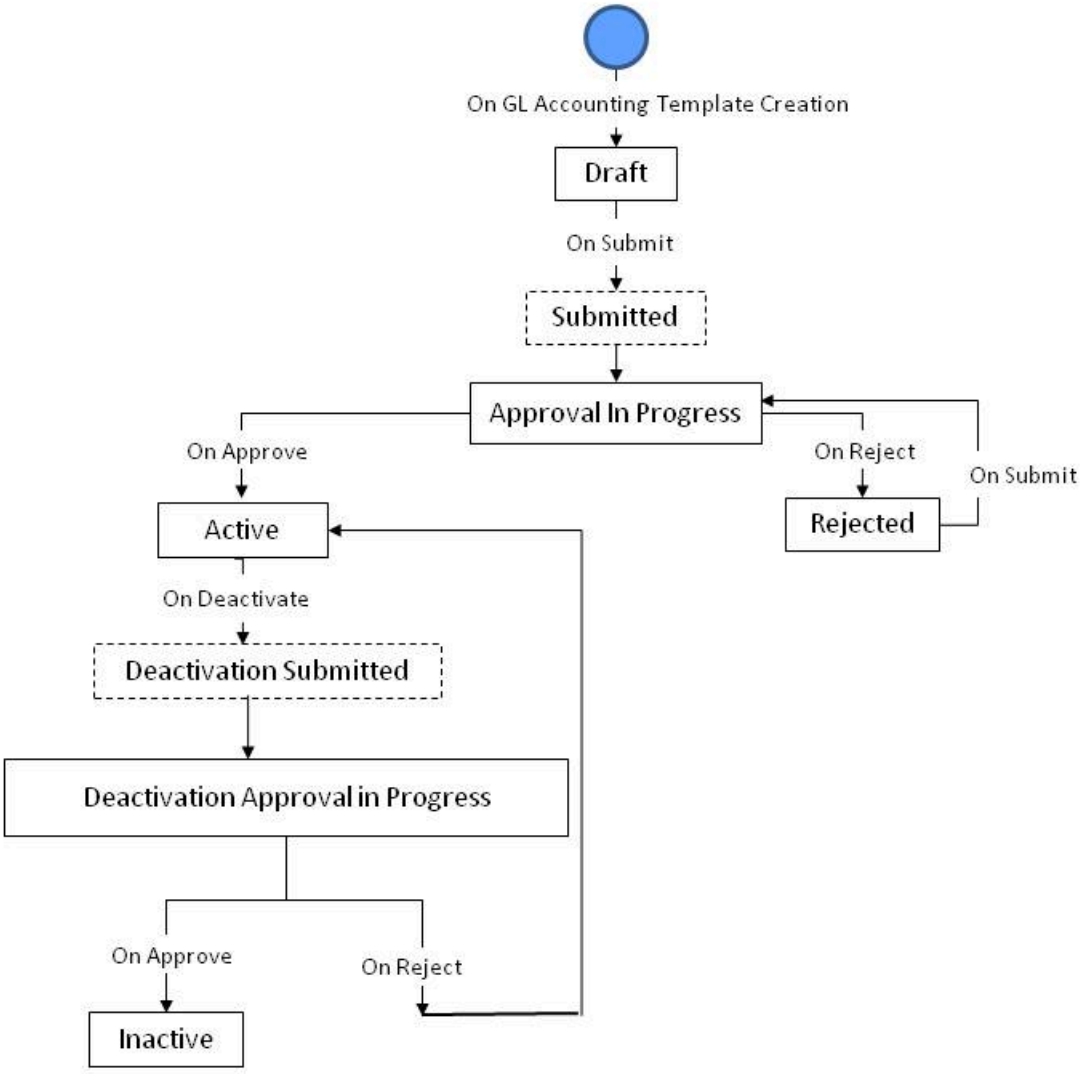

Algorithms Used in C1- GLAT

The following table lists the algorithms which are attached to the **C1-GLAT** business object:

System Event	Algorithm	Algorithm Type	Description
Information	C1-GLAT-INF	C1-GLAT-INF	This algorithm generates the GLAT information string which appears throughout the application. This algorithm concatenates the following fields: • GLAT Description • GLAT Status Description • GLAT ID

The following table lists the algorithms which are used in the lifecycle of the **C1-GLAT** business object:

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Status	System Event	Algorithm	Algorithm Type	Description
Draft	Exit	F1-TODOCOMPL	F1-TODOCOMPL	This algorithm type completes To Do entries that are linked to an object when the object exits a given state. The system finds all open To Do entries with drill keys for the current business object's primary key, and completes them, unless the To Do entry's type has been configured with an Exclude To Do Type Characteristic Type indicating that it should not be automatically completed.
Submitted	Enter	C1-GLATSUB	C1-GLATSUB	This algorithm checks the following: • If soft parameter value is set to Y then approval workflow will be triggered.
Approval in Progress	Enter	C1-GLATAPPEN	C1-GLATAPPEN	This algorithm creates the To Do based on the Approval To Do Type configured in algorithm.
Approval in Progress	Exit	C1-GLATAPPEX	C1-GLATAPPEX	This algorithm checks whether an approver is associated with the approval To Do Role specified in the **C1-GLATAAPEN** Algorithm. It does not allow the submitter to approve or reject the GLAT request.
Approval in Progress	Exit	F1-TODOCOMPL	F1-TODOCOMPL	This algorithm type completes To Do entries that are linked to an object when the object exits a given state. The system finds all open To Do entries with drill keys for the current business object's primary key, and completes them, unless the To Do entry's type has been configured with an Exclude To Do Type Characteristic Type indicating that it should not be automatically completed.
Active	-	-	-	-
Deactivation Submitted	Enter	C1-GLATSUB	C1-GLATSUB	This algorithm checks the following: • If soft parameter value is set to Y then approval workflow will be triggered.
Deactivation Approval In Progress	Enter	C1-GLATAPPEN	C1-GLATAPPEN	This algorithm creates the To Do based on the Approval To Do Type configured in algorithm.
Deactivation Approval In Progress	Exit	C1-GLATAPPEX	C1-GLATAPPEX	This algorithm checks whether an approver is associated with the approval To Do Role specified in the **C1-GLATAAPEN** Algorithm. It

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Status	System Event	Algorithm	Algorithm Type	Description
				does not allow the submitter to approve or reject the GLAT request.
Deactivation Approval In Progress	Exit	F1-TODOCOMPL	F1-TODOCOMPL	This algorithm type completes To Do entries that are linked to an object when the object exits a given state. The system finds all open To Do entries with drill keys for the current business object's primary key, and completes them, unless the To Do entry's type has been configured with an Exclude To Do Type Characteristic Type indicating that it should not be automatically completed.
Rejected	Exit	F1-TODOCOMPL	F1-TODOCOMPL	This algorithm type completes To Do entries that are linked to an object when the object exits a given state. The system finds all open To Do entries with drill keys for the current business object's primary key, and completes them, unless the To Do entry's type has been configured with an Exclude To Do Type Characteristic Type indicating that it should not be automatically completed.
Inactive	-	-	-	-

Prerequisites

To setup the GL Accounting Template, you need to do the following:

- Define rejected status reasons for the **C1-GLAT** business object
- Define deactivated status reasons for the **C1-GLAT** business object
- Assign the **C1-GLAT** To Do type to a To Do role whose users must receive To Do generated while submitting a template for approval
- Define the required algorithms, for approval and To Do type role and configurations

GL Accounting Template (Used for Searching)

The **GL Accounting Template** screen allows you to search for a template using various search criteria. It also allows you to create template. Through this screen, you can navigate to the following screen:

- GL Accounting Template (Used for Viewing) on page 2205

This screen consists of the following zones:

- Search GL Accounting Template on page 2200
- GL Accounting Template Lines on page 2201

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Search GL Accounting Template

The **Search GL Accounting Template** zone allows you to search for GL accounting templates using various search criteria. This zone contains the following two sections:

- **Search Criteria** - The **Search Criteria** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Template ID	Used to search a particular template.	No
Description	Used to specify the description of a template.	No
Status	Used to indicate the status of the template. The valid values are: • Draft • Approval In Progress • Deactivation Approval In Progress • Active • Inactive • Rejected	No
Process	Used to search a particular process.	No
Sub Process 1	Used to search a particular Sub Process 1.	No
Sub Process 2	Used to search a particular Sub Process 2.	No
Sub Process 3	Used to search a particular Sub Process 3.	No
Sub Process 4	Used to search a particular Sub Process 4.	No
Sub Process 5	Used to search a particular Sub Process 5.	No
Effective Start Date	Used to search templates which are effective from a particular date.	No
Effective End Date	Used to search templates which are effective till a particular date.	No

Note: You must specify at least one search criterion while searching for a template.

- **Search Results** - On clicking the **Search** button, the search results appear based on the specified search criteria. The **Search Results** section contains the following columns:

Column Name	Column Description
Process	Displays the process.
GL Accounting Template Request Information	Displays information about the template. **Note:** It has a link. On clicking the link, the **GL Accounting Template** screen appears where you can view the details of the respective template.
Description	Displays the description of process.
Sub Process 1	Displays the Sub Process 1.
Sub Process 2	Displays the Sub Process 2.
Sub Process 3	Displays the Sub Process 3.

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Column Name	Column Description
Sub Process 4	Displays the Sub Process 4.
Sub Process 5	Displays the Sub Process 5.
Effective Start Date	Displays the date from when the template is effective.
Effective End Date	Displays the date till when the template is effective.
Status	Displays the status of template.

Related Topics

For more information on...	See...
How to search for a GL Accounting Template	Searching for a GL Accounting Template on page 2201
How to view the details of a GL Accounting Template	Viewing the GL Accounting Template Details on page 2204
How to create a GL Accounting Template	Creating a GL Accounting Template on page 2202
GL Accounting Template Lines zone	GL Accounting Template Lines on page 2201

GL Accounting Template Lines

The **GL Accounting Template Lines** zone displays the details of the template lines. This zone contains the following columns:

Column Name	Column Description
Credit/Debit	Displays whether the template lines are of credit or debit.
Conditional Algorithm	Displays the algorithm that specified that template line is valid or not.
Distribution Code	Displays the distribution code which indicates the template associated with the charge.
User Defined Amount Field	Displays the amount to be used in a template line.

Note: By default, the **GL Accounting Template Lines** zone does not appear in the **GL Accounting Template** screen. It appears when you click the **Broadcast** (⦾) icon corresponding to the template in the **Search Results** section.

Related Topics

For more information on...	See...
How to search for a GL Accounting Template	Searching for a GL Accounting Template on page 2201
How to view the details of a GL Accounting Template	Viewing the GL Accounting Template Details on page 2204
How to create a GL Accounting Template	Creating a GL Accounting Template on page 2202
Search GL Accounting Template zone	Search GL Accounting Template on page 2200

Searching for a GL Accounting Template

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Procedure

To search for a GL Accounting template:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **G** and then click **GL Accounting Template**.
   The **GL Accounting Template** screen appears.
3. Enter the search criteria in the **Search GL Accounting Template** zone.

> **Note:** ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.

4. Click **Search**.
   A list of templates that meet the search criteria appears in the **Search Results** section.

Related Topics

For more information on...	See...
GL Accounting Template screen	GL Accounting Template (Used for Searching) on page 2199
Search GL Accounting Template zone	Search GL Accounting Template on page 2200

Creating a GL Accounting Template

Prerequisites

To create a GL Accounting template, you should have:

- Conditional Algorithms and Distribution codes defined in the application.

Procedure

To create a GL Accounting template:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **G** and then click **GL Accounting Template**.
   The **GL Accounting Template** screen appears.
3. Click the **Add** button in the **Page Title** area of the **GL Accounting Template** screen.

   The **GL Accounting Template** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details about the template. This section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Process	Used to specify a particular process.	Yes
Description	Used to indicate the description of a process.	Yes
Sub Process 1	Used to specify a Sub Process 1.	Yes (Conditional)

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Field Name	Field Description	Mandatory (Yes or No)
		Note: This field is required if **Process** is **Bill Segment or Payment Segment or Adjustments**
Sub Process 2	Used to specify a Sub Process 2.	Yes (Conditional) **Note:** This field is required if **Process** is **Bill Segment or Payment Segment or Adjustments**
Sub Process 3	Used to specify a Sub Process 3.	Yes (Conditional) **Note:** This field is required if **Process** is **Bill Segment or Payment Segment or Adjustments.**
Sub Process 4	Used to specify a Sub Process 4.	No
Sub Process 5	Used to specify a Sub Process 5.	No
Effective Start Date	Used to specify date for a template which is effective from a particular date.	Yes
Effective End Date	Used to specify date for a template which is effective till a particular date.	No

- **GL Accounting Template Lines** -Used to specify the template lines in a GL accounting template. This section contains the following columns:

Column Name	Column Description	Mandatory (Yes or No)
Sequence No	Used to specify the sequence number.	Yes
Credit/Debit	Used to indicate whether template lines are of credit or debit.	Yes
Conditional Algorithm	Used to specify the algorithm which specifies that template line is valid or not.	No
Distribution Code	Used to indicate the distribution code which indicates the template associated with the charge.	Yes
User Defined Amount Field	Used to indicate the amount to be used in a template line.	Yes

4. Enter the required details

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> **Note:**
>
> You can search for a conditional algorithm and distribution code by clicking the **search** (🔍) icon corresponding to the respective field.
>
> At least one credit and one debit line is required while defining a template.
>
> System will not allow to add a template having same set of process, sub processes and effective date. If there is a template already created and its status is Inactive, then only template can be created with same set of process, sub processes and effective date.
>
> Each conditional line must have unique User Defined Amount Field value.

5. Add template lines for a template defined.
6. Click **Save**.
   The GL Accounting template is created and the status of the template is set to **Draft**. The **GL Accounting Template** screen appears with the details of template.

Related Topics

For more information on...	See...
GL Accounting Template screen	GL Accounting Template (Used for Searching) on page 2199
How to edit a GL Accounting Template	Editing a GL Accounting Template on page 2208

Viewing the GL Accounting Template Details

Procedure

To view the details of a GL Accounting Template:

1. Search for the template in the **GL Accounting Template** screen.
2. In the **Search Results** section, click the link in the **GL Accounting Template Information** column corresponding to the template whose details you want to view.

   The **GL Accounting Template** screen appears. It consists of the following tabs:

   - **Main** - Displays information about the template. It contains the following zone:
     - **GL Accounting Template** - Displays the details of the template.
   - **Log** - Lists the complete trail of actions performed on the template. This tab contains the following zone:
     - **GL Accounting Template Log** - Displays the trail of actions performed on the particular template.
3. View the details of the template in the **GL Accounting Template** zone.

Related Topics

For more information on...	See...
GL Accounting Template screen	GL Accounting Template (Used for Searching) on page 2199
GL Accounting Template zone	GL Accounting Template on page 2205
How to search for a GL Accounting Template	Searching for a GL Accounting Template on page 2201
How to view a GL Accounting Template Lines	Viewing the GL Accounting Template Lines Details on page 2205

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Viewing the GL Accounting Template Lines Details

Procedure

To view the details of a GL Accounting Template Lines:

1. Search for the template in the **GL Accounting Template** screen.
2. In the **Search Results** section, click the **Broadcast** (ᯤ) icon corresponding to the template in the **Search *R*esults** section.

   The **GL Accounting Template Lines** zone appears in the **GL Accounting Template** screen.
3. View the details of the template lines in the **GL Accounting Template Lines** zone.

Related Topics

For more information on...	**See...**
GL Accounting Template screen	GL Accounting Template (Used for Searching) on page 2199
GL Accounting Template zone	GL Accounting Template on page 2205
GL Accounting Template Lines zone	GL Accounting Template Lines on page 2201

GL Accounting Template (Used for Viewing)

Once you create a template, the **GL Accounting Template** screen allows you to:

- View the details of a template
- Edit the details of a template
- Delete a template
- Submit a template for approval
- Approve or reject a template
- Deactivate a template

This screen consists of the following tabs:

- **Main** - Displays information about the template. It contains the following zone:
  - **GL Accounting Template** - Displays the details of the template.
- **Log** - Lists the complete trail of actions performed on the template. This tab contains the following zone:
  - **GL Accounting Template Log** - Displays the trail of actions performed on the particular template.

GL Accounting Template - Main

The **Main** tab on the **GL Accounting Template** contains the following zone:

GL Accounting Template on page 2205

GL Accounting Template

The **GL Accounting Template** zone displays the details of the template. This zone contains the following sections:

- **Main** - This section provides basic information about the GL Accounting template. It contains the following fields:

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Field Name	Field Description
GL Accounting Template Information	Displays information about the template
Status	Indicates the status of the template.
Process	Displays the process.
Description	Displays the description of the process.
Sub Process 1	Displays the Sub Process 1.
Sub Process 2	Displays the Sub Process 2.
Sub Process 3	Displays the Sub Process 3.
Sub Process 4	Displays the Sub Process 4.
Sub Process 5	Displays the Sub Process 5.
Effective Start Date	Displays the date from when the template is effective.
Effective End Date	Displays the date till when the template is effective.

- **GL Accounting Template Lines** - Lists the GL Accounting template lines. It contains the following columns:

Column Name	Column Description
Sequence No	Displays the sequence number.
Credit/Debit	Displays whether the template lines are of credit or debit.
Conditional Algorithm	Displays the algorithm that specified that template line is valid or not.
Distribution Code	Displays the distribution code which indicates the template associated with the charge.
User Defined Amount Field	Displays the amount to be used in a template line.

- **Record Actions** - This section contains the following buttons:

Button Name	Button Description
Edit	Used to edit the details of the template.
	Note: The **Edit** button appears when the template is in the **Draft** or **Rejected** status.
Delete	Used to delete the template.
	Note: The **Delete** button appears when the template is in the **Draft** or **Rejected** status.
Submit	Used to activate the template.
	Note: The **Submit** button appears when the template is in the **Draft** or **Rejected** status.
Approve	Used to approve the template.
	Note: the **Approve** button appears when the template is in the **Approval In Progress** or **Deactivation Approval In Progress** status.
Reject	Used to reject the template.

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Button Name	Button Description
	Note: the **Reject** button appears when the template is in the **Approval In Progress** or **Deactivation Approval In Progress** status.
Deactivate	Used to deactivate the active template.
	Note: The **Deactivate** button appears when the template is in the **Active** status.

- **Record Information** - This section contains the following fields:

Field Name	Field Description
Business Object	Indicates the business object using which the template is created. In addition, a context menu appears corresponding to this field which helps in navigating to other screens in the application.
	Note: It has a link. On clicking the link, the **Business Object** screen appears where you can view the details of the respective business object.

GL Accounting Template - Log

The **Log** tab on the **GL Accounting Template** screen contains the following zone:

GL Accounting Template Log on page 2207

GL Accounting Template Log

The **GL Accounting Template Log** zone on the **GL Accounting Template** screen lists the complete trail of actions performed on the GL Accounting template. This zone contains the following columns:

Column Name	Column Description
Date/Time	Displays the date and time when the action was performed on the template.
Details	Displays the details about the action performed on the template.
User	Indicates the user who has performed the action on the template.
Log Type	Indicates the type of log.
Related Object	Indicates the object or entity which is generated when the action is performed on the template.
Status Reason	Displays the status reason of action performed on the template.

Note: You can manually add a log entry for the template by clicking the **Add Log Entry** link in the upper right corner of the **GL Accounting Template Log** zone.

The **Add GL Accounting Template Log** window appears. Enter **Log Details** and click **Save**. The GL Accounting Template log is added.

Related Topics

For more information on...	See...
How to view the log of a GL Accounting Template	Viewing the Log of a GL Accounting Template on page 2214

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Editing a GL Accounting Template

Procedure

To edit a GL Accounting Template:

1. Search for the template in the **GL Accounting Template** screen.
2. In the **Search Results** section, click the link in the **GL Accounting Template Information** column *c*orresponding to the template whose details you want to edit.
   The **GL Accounting Template** screen for editing appears.
3. Click the **Edit** button in the **GL Accounting Template** zone.

Note: The **Edit** button appears when the template is in the **Draft** or **Rejected** status.

The **GL Accounting Template** screen appears. It contains the following sections:

- **Main** - Used to specify basic details about the template. This section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Process	Used to specify a particular process.	Yes
Description	Used to indicate the description of a process.	Yes
Sub Process 1	Used to specify a Sub Process 1.	Yes (Conditional) **Note:** This field is required if **Process** is **Bill Segment or Payment Segment or Adjustments**
Sub Process 2	Used to specify a Sub Process 2.	Yes (Conditional) **Note:** This field is required if **Process** is **Bill Segment or Payment Segment or Adjustments**
Sub Process 3	Used to specify a Sub Process 3.	Yes (Conditional) **Note:** This field is required if **Process** is **Bill Segment or Payment Segment or Adjustments.**
Sub Process 4	Used to specify a Sub Process 4.	No
Sub Process 5	Used to specify a Sub Process 5.	No
Effective Start Date	Used to specify date for a template which is effective from a particular date.	Yes
Effective End Date	Used to specify date for a template which is effective till a particular date.	No

- **GL Accounting Template Lines** - Used to specify the template lines in a GL accounting template. This section contains the following columns:

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Column Name	Column Description	Mandatory (Yes or No)
Sequence No	Used to specify the sequence number.	Yes
Credit/Debit	Used to indicate whether template lines are of credit or debit.	Yes
Conditional Algorithm	Used to specify the algorithm which specifies that template line is valid or not.	No
Distribution Code	Used to indicate the distribution code which indicates the template associated with the charge.	Yes
User Defined Amount Field	Used to indicate the amount to be used in a template line.	Yes

Note:

If you want to specify more than one template lines, click the **Add** (+) icon corresponding to the sequence No and then specify the details.

However, if you want to remove a template line from the template, click the **Delete** (🗑) icon corresponding to the sequence No.

You can search for a conditional algorithm and distribution code by clicking the **search** (🔍) icon corresponding to the respective field.

At least one credit and one debit line is required while defining a template.

4. Modify the details of the template, if required.
5. Click **Save**.
   The changes made to the GL Accounting template are saved.

Related Topics

For more information on...	See...
How to search for a GL Accounting Template	Searching for a GL Accounting Template on page 2201
GL Accounting Template screen	GL Accounting Template (Used for Searching) on page 2199
GL Accounting Template zone	GL Accounting Template on page 2205

Deleting a GL Accounting Template

Procedure

To delete a GL Accounting Template:

1. Search for the template in the **GL Accounting Template** screen.
2. In the **Search Results** section, click the link in the **GL Accounting Template Information** column *c*orresponding to the template that you want to delete.
   The **GL Accounting Template** screen appears.
3. Click the **Delete** button in the **GL Accounting Template** zone.
   A message appears confirming whether you want to delete the template.

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> **Note:** The **Delete** button appears when the template is in the **Draft** or **Rejected** status.

4. Click **OK**.
   The GL Accounting template is deleted.

> **Note:**
>
> You can delete a template when its status is **Draft**.

Related Topics

For more information on...	See...
How to search for a GL Accounting Template	Searching for a GL Accounting Template on page 2201
GL Accounting Template screen	GL Accounting Template (Used for Searching) on page 2199
GL Accounting Template zone	GL Accounting Template on page 2205

Submitting a GL Accounting Template

Prerequisites

To submit a GL Accounting Template, you should have:

- Process and GL Accounting template lines defined in the template.

Procedure

To submit a GL Accounting Template:

1. Search for the template in the **GL Accounting Template** screen.
2. In the **Search Results** section, click the link in the **GL Accounting Template Information** column *c*orresponding to the template that you want to submit.
   The **GL Accounting Template** screen appears.
3. Click the **Submit** button in the **GL Accounting Template** zone.
   The system behaves in the following manner:

If...	Then...
Approval Required Flag is set to Yes in the **C1-GLATSUB** algorithm.	A To Do of the **C1-GLAT** To Do type is created and sent to the approver and the status of the template is changed to **Approval In Progress**.
Approval Required Flag is set to No in the **C1-GLATSUB** algorithm.	The template is created using the specified process and the status of the template is changed to **Active** .

> **Note:**
>
> The **Submit** button appears when the template is in the **Draft** or **Rejected** status.

Related Topics

For more information on...	See...
How to search for a GL Accounting Template	Searching for a GL Accounting Template on page 2201

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For more information on...	See...
GL Accounting Template screen	GL Accounting Template (Used for Searching) on page 2199
GL Accounting Template zone	GL Accounting Template on page 2205
How to edit a GL Accounting Template	Editing a GL Accounting Template on page 2208
How to delete a GL Accounting Template	Deleting a GL Accounting Template on page 2209

Approving a GL Accounting Template

You can view the number of GL Accounting templates which are pending for approval in the **GL Accounting Template** screen. The approver can review, and accordingly approve or reject the template based on the observations.

Note: The system will not allow you to approve or reject a template submitted by you.

Procedure

To approve a template:

1. Do either of the following:

If you want to...	Then...
Approve a GL Accounting Template through the GL Accounting template screen	**a.** Search for the template in the **GL Accounting template** screen. **b.** In the **Search Results** section, click the link in the **GL Accounting Template Information** column corresponding to the template which you want to review.
Approve a GL Accounting Template from the To Do List screen	**a.** Click the **Menu** link in the **Application** toolbar. A list appears. **b.** From the **Main** menu, select **To Do** and then click **To Do List**. The **To Do Type for User Search** window appears. **c.** Enter **C1-GLAT** in the **To Do Type** field. **d.** Click the **Search** button corresponding to the **To Do Type** field. The **To Do List** screen appears. **e.** Select the **Open** option from the **Filter by** list to view all unassigned To Dos. **f.** Click the link in the **Message** column corresponding to the To Do of the GL Accounting template that you want to review.

   The **GL Accounting Template** screen appears.
2. Review the template details.
3. Click the **Approve** button in the **GL Accounting Template** zone.

   The system behaves in the following manner:

If you are...	Then...
Approving a GL Accounting template	The status of the template is changed to **Active** as specified in the GL Accounting template.

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> **Note:** The **Approve** button appears when the template is in the **Approval In Progress** or **Deactivation Approval In Progress** status.

Related Topics

For more information on...	See...
How to search for a GL Accounting Template	Searching for a GL Accounting Template on page 2201
GL Accounting Template screen	GL Accounting Template (Used for Searching) on page 2199
GL Accounting Template zone	GL Accounting Template on page 2205

Rejecting a GL Accounting Template

Prerequisites

To reject a GL Accounting template, you should have:

- Rejection reasons defined in the application

> **Note:**
>
> While rejecting a GL Accounting template, you need to specify the reason why you want to reject the template. You can select the appropriate rejection reason when you have defined the reasons for the **Rejected** status of the **C1-GLAT** business object in the **Status Reason** screen.
>
> The system will not allow you to approve or reject a template submitted by you.

Procedure

To reject a GL Accounting template

1. Do either of the following:

If you want to	Then
Reject a GL Accounting template through the GL Accounting Template screen	**a.** Search for the template in the **GL Accounting Template** screen. **b.** In the **Search Results** section, click the link in the **GL Accounting Template Information** column corresponding to the template which you want to review.
Reject a GL Accounting template from the To Do List screen	**a.** Click the **Menu** link in the **Application** toolbar. A list appears. **b.** From the **Main** menu, select **To Do** and then click **To Do List**. The **To Do Type for User Search** window appears. **c.** Enter **C1-GLAT** in the **To Do Type** field. **d.** Click the **Search** button corresponding to the **To Do Type** field. The **To Do List** screen appears. **e.** Select the **Open** option from the **Filter by** list to view all unassigned To Dos.

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If you want to	Then
	f. Click the link in the **Message** column corresponding to the To Do of the template that you want to review.

The **GL Accounting Template** screen appears.

2. Review the template details.
3. Click the **Reject** button in the **GL Accounting Template** zone.

The **Reject GLAT Request** window appears. It contains following fields:

Field Name	Field Description	Mandatory (Yes or No)
Status Reason	Used to indicate the reason why you want to reject the template	Yes
Comments	Used to specify additional information while rejecting the template.	No

Note: The **Reject** button appears when:

- The template is in the **Approval In Progress** or **Deactivation Approval In Progress** status.
- A user with the approval To Do role is reviewing the template.

4. Select the rejection reason from the **Status Reason** list.
5. Click **Save**.
   The status of the template is changed to **Rejected**.

Related Topics

For more information on...	See...
How to search for a GL Accounting Template	Searching for a GL Accounting Template on page 2201
GL Accounting Template screen	GL Accounting Template (Used for Searching) on page 2199
GL Accounting Template zone	GL Accounting Template on page 2205
How to approve a GL Accounting Template	Approving a GL Accounting Template on page 2211

Deactivating a GL Accounting Template

Prerequisites

To deactivate a GL Accounting template, you should have:

- Deactivation reasons defined in the application.

Note:

While deactivating a GL Accounting template, you need to specify the reason why you want to deactivate the template. You can select the appropriate deactivation reason when you have defined the reasons for the deactivation status of the **C1-GLAT** business object in the **Status Reason** screen.

Procedure

To deactivate a GL Accounting template:

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1. Search for the template in the **GL Accounting Template** screen.
2. In the **Search Results** section, click the link in the **GL Accounting Template Information** column *c*orresponding to the template that you want to deactivate.
   The **GL Accounting Template** screen appears.
3. Click the **Deactivate** button in the **GL Accounting Template** zone.

   Note: The **Deactivate** button appears when the template is in the **Active** status.

   The **Deactivate GLAT Request** window appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Status Reason	Used to indicate the reason for deactivating a template	Yes
Comments	Used to specify the additional comments for the deactivation of template.	No

4. Click **OK**.
   The GL Accounting template status is changed to **Deactivation Approval In Progress** .

Related Topics

For more information on...	See...
How to search for a GL Accounting Template	Searching for a GL Accounting Template on page 2201
GL Accounting Template screen	GL Accounting Template (Used for Searching) on page 2199
GL Accounting Template zone	GL Accounting Template on page 2205

Viewing the Log of a GL Accounting Template

Procedure

To view the log of a GL Accounting template:

1. Search for the template in the **GL Accounting template** screen.
2. In the **Search Results** section, click the link in the **GL Accounting Template Information** column *c*orresponding to the template whose log you want to view.

   The **GL Accounting Template** screen appears. It consists of the following tabs:

   - **Main** - Displays information about the template. It contains the following zone:
     - **GL Accounting Template** - Displays the details of the template.
   - **Log** - Lists the complete trail of actions performed on the template. This tab contains the following zone:
     - **GL Accounting Template Log** - Displays the trail of actions performed on the particular template.
3. Click the **Log** tab.

   The **GL Accounting Template Log** zone in the **Log** tab contains the following columns:

Column Name	Column Description
Date/Time	Displays the date and time when the action was performed on the template.
Details	Displays the details about the action performed on the template.

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Column Name	Column Description
User	Indicates the user who has performed the action on the template.
Log Type	Indicates the type of log.
Related Object	Indicates the object or entity which is generated when the action is performed on the template.
Status Reason	Indicates the reason why the template was rejected or voided.

Note: You can manually add a log entry for the template by clicking the **Add Log Entry** link in the upper right corner of the **GL Accounting Template Log** zone.

Related Topics

For more information on...	See...
How to search for a GL Accounting Template	Searching for a GL Accounting Template on page 2201
How to add a log entry for a GL Accounting Template	Adding a Log Entry for a GL Accounting Template on page 2215

Adding a Log Entry for a GL Accounting Template

Procedure

To add a log entry for a GL Accounting Template:

1. Search for the template in the **GL Accounting Template** screen.
2. In the **Search Results** section, click the link in the **GL Accounting Template Information** column corresponding to the template whose log you want to edit.

   The **GL Accounting Template** screen appears. It consists of the following tabs:

   - **Main** - Displays information about the template. It contains the following zone:
     - **GL Accounting Template** - Displays the details of the template.
   - **Log** - Lists the complete trail of actions performed on the template. This tab contains the following zone:
     - **GL Accounting Template Log** - Displays the trail of actions performed on the particular template.
3. Click the **Log** tab.
   The **Log** tab appears.
4. Click the **Add Log Entry** link in the upper right corner of the **GL Accounting Template Log** zone.

   The **Add GL Accounting Template Log** window appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
GL Accounting Template Information	Displays information about the template.	Not applicable
Log Details	Used to specify additional comments for the template.	Yes

5. Enter the comments in the **Log Details** field.
6. Click **Save**.
   The log entry is added in the **GL Accounting Template Log** zone.

Related Topics

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For more information on...	See...
How to search for a GL Accounting Template	Searching for a GL Accounting Template on page 2201

Chapter 31

Payment Agreement Request

Topics:

- Payment Agreement Request (Without Approval) Status Transition
- Payment Agreement Request (With Approval) Status Transition
- Prerequisites
- Algorithms Used in C1-PaymentAgreementRequest
- Payment Agreement Request Type
- Payment Agreement Request (Used for Searching)
- Payment Agreement Request (Used for Viewing)

Oracle Revenue Management and Billing provides the ability to schedule payments in installments for a set of unpaid bills of an account through a payment agreement request. Let us understand this with the help of an example. The following bills of the account A1 are unpaid:

- B1 (Bill Amount - 100$, Unpaid Amount - 75$)
- B2 (Bill Amount - 250$, Unpaid Amount - 125$)
- B3 (Bill Amount - 150$, Unpaid Amount - 150$)

Through a payment agreement request, you can schedule payments for these three bills in various installments. For example, you can schedule the following payments for the account A1:

Schedule Date	Schedule Amount
01-Jan-2017	100
15-Jan-2017	100
01-Feb-2017	100
15-Feb-2017	50

While creating a payment agreement request, you need to specify the payment agreement request type using which you want to create the payment agreement request. It is the payment agreement request type which helps the system to determine:

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

You can only add completed bills of the account which are unpaid in a payment agreement request. Once a payment agreement request is created for an account, the status of the payment agreement request is set to **Draft**. You can then edit or delete the payment agreement request, if required. Once you add the unpaid bills of the account, you can submit the payment agreement request. On submitting a payment agreement request, the status of the payment agreement request is set to **Active**.

You can optionally configure the system to use the approval workflow process for a payment agreement request. If the **Approval Required** flag is set to **Yes** in a payment agreement request type, then on submitting the respective payment agreement request, the approval workflow process creates a To Do for the approver to review the payment agreement request. Once the approver approves the payment agreement request, the status of the payment agreement request is set to **Active**. The approver can approve, reject, or resubmit the payment

agreement request. When the payment agreement request is resubmitted to the submitter, the status of the payment agreement request is set to **Draft**.

Even if the approval workflow is configured for a payment agreement request type, you can skip the approval workflow for a payment agreement request. The system enables you to skip the approval workflow for a payment agreement request until you exceed the maximum limit defined in the **C1-PASUBMIT** algorithm. You can define the following parameters in the **C1-PA-SUBMIT** algorithm:

- Number of days to consider in past to check whether any payment agreement request with a particular status exist in the specified duration (for example, 365)
- Maximum number of payment agreement requests which can be activated without approval (for example, 1)
- Status in which payment agreement request should exists in the specified duration (for example, Broken Promise)

In the above example, on clicking the **Submit** button, the system will check how many payment agreement requests for the account in the last 365 days exists in the **Broken Promise** status. If the system finds one or more than one payment agreement requests in the **Broken Promise** status in the last 365 days, the approval workflow process creates a To Do for the approver to review the payment agreement request. However, if the system does not find any payment agreement request in the **Broken Promise** status in the last 365 days, the payment agreement request is not sent for approval and the status of the payment agreement request is directly changed to **Active**.

When the **Payment Agreement Request Periodic Monitor (C1-PAREQ)** batch is invoked, the system checks whether there are any payment agreement requests in the **Active** status. If there is a payment agreement request in the **Active** status, the system checks whether the total unpaid amount of the bills is equal to zero and whether each bill is fully matched. If so, the status of the payment agreement request is changed to **Kept Promise**. However, if the total unpaid amount of the bills is not equal to zero, the system checks whether the current date is later than the schedule date and does not fall within the grace period. If so, the system checks whether total unpaid amount is greater than the total future schedule amount. If so, the status of the payment agreement request is changed to **Broken Promise**. However, if the current date is earlier than the schedule date or falls within the grace period, or the total unpaid amount is less than the total future schedule amount, the status of payment agreement request remains in **Active**. The system enables you to edit a payment agreement request which is in the **Active** status.

While defining a payment agreement request, you need to specify the payment method through which the payment will be done and whether the payment will be done through the payor or third party payor account. If the **Auto Pay** flag is set to **Yes** for a payment method, you need to also specify the automatic payment option using which the automatic payment should be created on the schedule date. One more batch named **Generate Auto Pay for Payment Agreement (C1-APPAB)** is introduced in this release. When the **Generate Auto Pay for Payment Agreement (C1-APPAB)** batch is invoked, the system checks whether there are any payment agreement requests in the **Active** status. If so, whether the account for which the payment agreement request is created is eligible for automatic payment and the defer auto pay date (if any) defined for the account is earlier than the batch business date. If so, the system checks whether the extract date of the unpaid bill (with the earliest due date) is earlier than the schedule date.

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If so, the system creates the automatic payment for the unpaid bill on the schedule date. However, if the account is not eligible for automatic payment, or the defer auto pay date is equal to or later than batch business date, or the extract date is equal to or later than the schedule date, the automatic payment is not generated for the account.

During the payment agreement request process, a payment agreement request creation goes through various statuses in its lifecycle. For more information about the payment agreement request statuses, see Payment Agreement Request (Without Approval) Status Transition on page 2220 and Payment Agreement Request (With Approval) Status Transition on page 2221. If the payment agreement request type is without approval then payment agreement status will automatically move from draft to active. The approval configuration algorithm **C1-PA-APPEXT** decides whether the request will be sent for approval or not. If the payment agreement request type is with approval then payment agreement will be sent for approval depending on:

- The number of days checked for approval workflow
- Payment agreement statuses (active, broken, kept) to be considered
- The maximum number of payment agreements allowed

Note: The lifecycle of a payment agreement request creation is driven by the respective business object using which the request is created. The payment agreement request feature explained in this document is articulated based on the lifecycle and logic defined in the business objects.

For more information on how to setup the payment agreement request process, see Prerequisites on page 2222.

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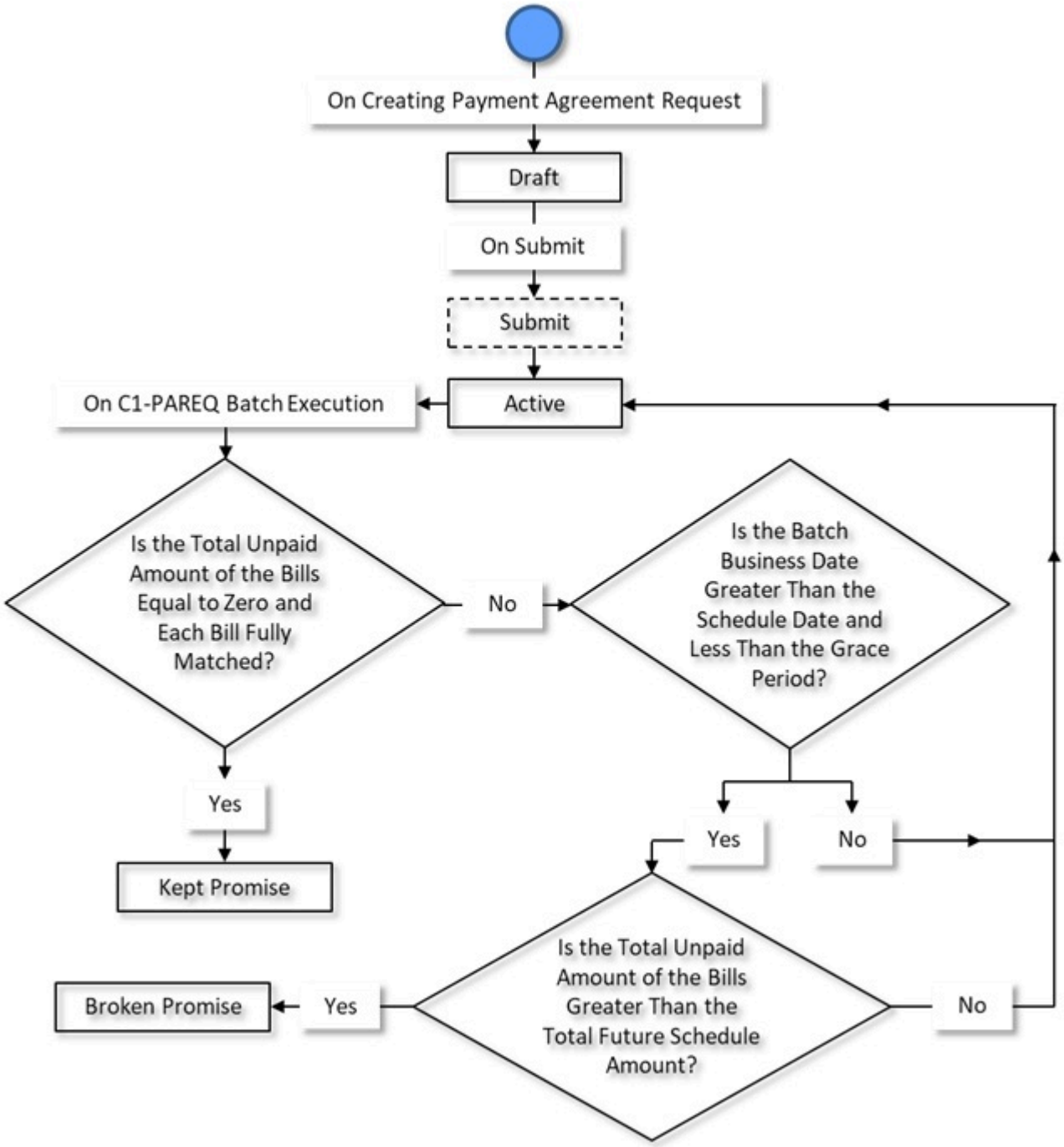
Payment Agreement Request (Without Approval) Status Transition

The following figure graphically indicates how a payment agreement request moves from one status to another when approval workflow is off:



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Payment Agreement Request (With Approval) Status Transition

The following figure graphically indicates how a payment agreement request moves from one status to another when approval workflow is on:

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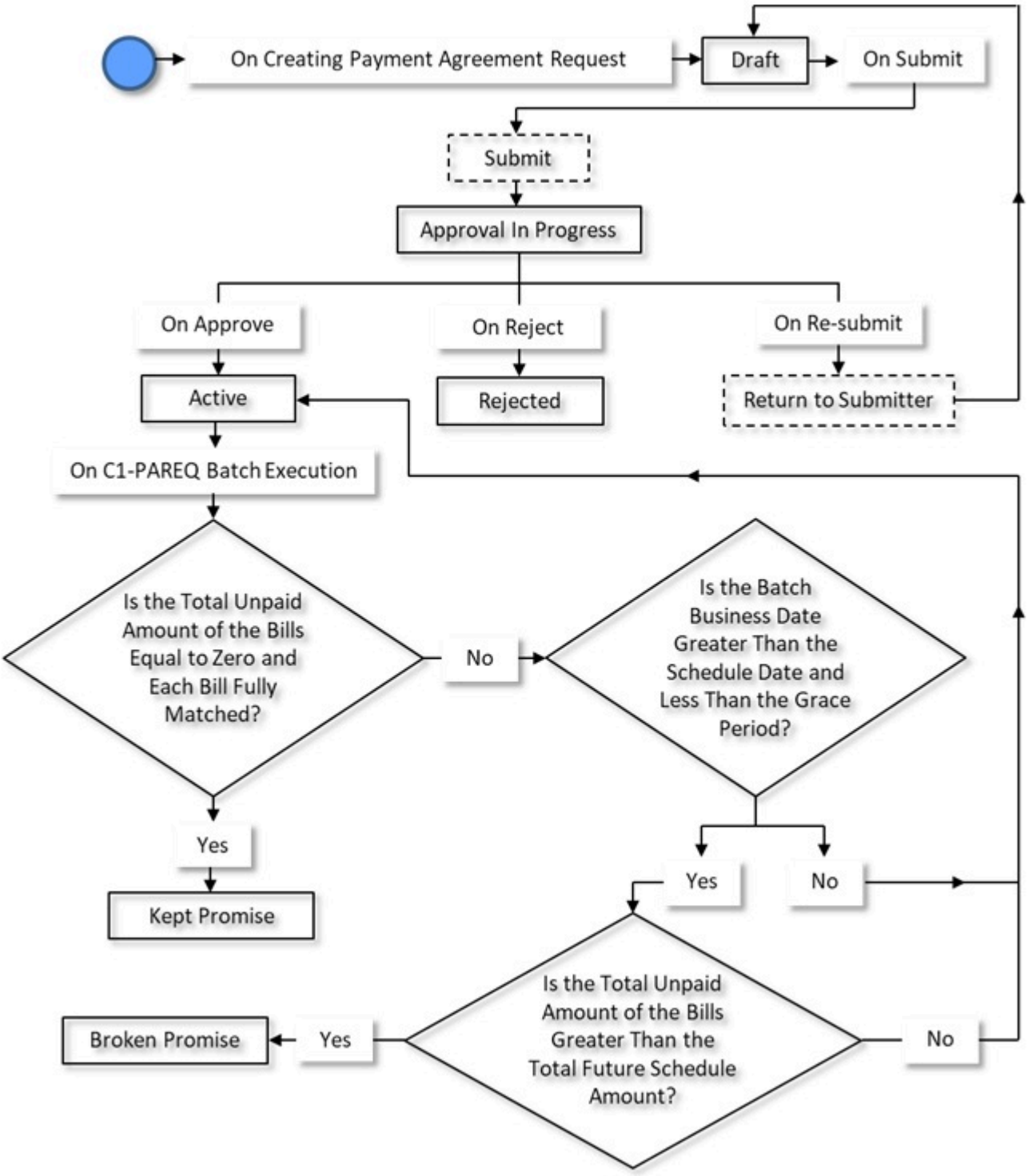

Prerequisites

To setup the payment agreement request process, you need to do the following:

- Define the required payment agreement request types in the system.

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- Define the required characteristic types where the characteristic entity is set to **Payment Agreement Request Type**.
- Define the required characteristic types where the characteristic entity is set to **Payment Agreement Request**.
- Define the required payment methods and third party payors for **Payment Agreement Request**.
- Create an algorithm using the **C1-PA-INFO** algorithm type if you want to create the payment agreement requests using the payment agreement request information.
- Define the kept promise status reason for the **C1-PaymentAgreementRequest** business object
- Define the broken promise status reason for the **C1-PaymentAgreementRequest** business object
- Defined rejected status reason for the **C1-PaymentAgreementRequest** business object
- Assign the **C1-PAREQ** To Do type to a To Do role whose users must receive To Do generated while submitting or resubmitting a payment agreement request for approval
- Configure the automatic process for respective payment methods in the **Pay Method** screen.

Algorithms Used in C1-PaymentAgreementRequest

The following table lists the algorithms which are attached to the **C1-PaymentAgreementRequest** business object:

System Event	Algorithm	Algorithm Type	Description
Information	C1-PA-INFO	C1-PA-INFO	Refer to C1-PA-INFO on page 2224
Pre-Processing	C1-PA-PRE	C1-PA-PRE	Refer to C1-PA-PRE on page 2224
Validation	C1-PA-VAL	C1-PA-VAL	Refer to C1-PA-VAL on page 2224

The following table lists the algorithms which are used in the lifecycle of the **C1-PaymentAgreementRequest** business object:

Status	System Event	Algorithm	Algorithm Type	Description
Draft	Enter	C1-PA-DRAFT	C1-PA-DRAFT	Refer to C1-PA-DRAFT on page 2224
Submit	Enter	C1-PA-SUBMIT	C1-PA-SUBMIT	Refer to C1-PA-SUBMIT on page 2224
Approval In Progress	Enter	C1-PA-APPENT	C1-PA-APPENT	Refer to C1-PA-APPENT on page 2225
	Exit	C1-PA-APPEXT	C1-PA-APPEXT	Refer to C1-PA-APPEXT on page 2225
	Exit	F1-TODOCOMPL	F1-TODOCOMPL	Refer to F1-TODOCOMPL on page 1469
Return to Submitter	Enter	C1-PA-RESUB	C1-PA-RESUB	Refer to C1-PA-RESUB on page 2225
Active	Enter	C1-PA-ACTENT	C1-PA-ACTENT	Refer to C1-ACTENT on page 2225
	Enter	C1-PAUSRNTFY	C1-PAUSRNTFY	Refer to C1-PAUSRNTFY on page 2225
	Monitor	C1-PASDTODO	C1-PASDTODO	Refer to C1-PASDTODO on page 2225
	Monitor	C1-PA-MONTR	C1-PA-MONTR	Refer to C1-PA-MONTR on page 2225

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Status	System Event	Algorithm	Algorithm Type	Description
Rejected	–	-	–	–
Kept Promise	Enter	C1-PAUSRNTFY	C1-PAUSRNTFY	Refer to C1-PAUSRNTFY on page 2225
Broken Promise	Enter	C1-PAUSRNTFY	C1-PAUSRNTFY	Refer to C1-PAUSRNTFY on page 2225
	Enter	C1-BPADMTR	C1-BPADMTR	Refer to C1-BPADMTR on page 2226

C1-PA-INFO

This algorithm generates the payment agreement request information string which appears throughout the application. This algorithm concatenates the following fields:

- Payment Agreement Request Type Description
- Payment Agreement Request Status Description
- Payment Agreement Request ID

C1-PA-PRE

This algorithm is used to avoid the concurrency issue for payment agreement. This algorithm also validate the duplicate bill, schedule, and characteristic on the edit screen.

C1-PA-VAL

This algorithm is used to validate payment agreement request.

C1-PA-DRAFT

This algorithm is invoked when the **Payment Agreement Request** is created in the **DRAFT** status. It validates if the linked delinquency process is valid and not in the **CANCELLED**, **TERMINATED**, and **COMPLETED** status. This algorithm also adds the unpaid bills to the payment agreement request details table.

C1-PA-SUBMIT

This algorithm used to perform following task:

- Used to validate payment agreement request on submitting.
- If request type is **without approval** then PA status will move from **Draft** to **Active** automatically
- If request type is **with approval** then PA will be sent for approval depending on following parameters defined at this algorithm.
  - **Number of days before to consider in calculation** - This parameter is used to search payment agreement specified days back to calculate number of Payment Agreement.
  - **Maximum Payment Agreement allowed without approval** - If this parameter is less than calculated value then it will go without approval, otherwise with approval.
  - **Status** - One status at a time like **Active**. These defined status are used in the calculation of the number of payment agreement

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C1-PA-APPENT

This algorithm creates **To Do** based on the **Approval To Do Type** configured in payment agreement request type.

C1-PA-APPEXT

This algorithm checks whether an approver is associated with the approval **To Do Role** specified in the payment agreement request type. It does not allow the submitter to approve or reject the payment agreement request.

F1-TODOCOMPL

This algorithm completes the To Do entries that are linked to an object when the object exits the given status. It finds and completes all open To Do entries where the business object's primary key is defined as a drill key. However, if the **Exclude To Do Entries From Auto Completion** (**F1-EXLTD**) characteristic is set to **Y** for a To Do type, the system does not automatically complete the respective To Do entry.

This algorithm contains the following parameter:

- **'Do Not Complete To Do Type' Char Type** – Used to specify the characteristic type that indicates whether the To Do entries should be automatically completed or not.

> **Note:** The **F1-EXLTD** characteristic type is shipped with the product. You can either use the **F1-EXLTD** characteristic type or a custom characteristic type, if required. Note that you must specify a predefined characteristic type where the characteristic entity is set to **To Do Type** and the predefined values are set to **Y** or **N**.

C1-PA-RESUB

This algorithm is invoked on **Re-Submit** button. It moves the status of payment agreement request into **Draft**. A **To Do** will be generated for the user as submitter whose **To Do Type** and **To Do Role** are fetched from payment agreement request type.

C1-ACTENT

This algorithm will validate Payment Agreement Request before activation.

C1-PAUSRNTFY

This algorithm will generate **To Do** whenever payment agreement status will change to **Active**, **Kept Promise**, and **Broken Promise** for configure **To Do Type**.

C1-PASDTODO

This algorithm is invoked by monitor batch. This will send **To Do** notification to the user for configurable number of days(X-days) in advance of the scheduled payment date.

C1-PA-MONTR

This algorithm is invoked from the **Payment Agreement Request Periodic Monitor (C1-PAREQ)** batch. It changes the status of the payment request from **Active** to **KP** (Kept Promise) or **BP** (Broken Promise) based on payment received.

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C1-BPADMTR

This algorithm creates a record in CI_ADM_RVW_SCH for a person or account depending on which entity type/entity id payment agreement has been created, and this record gets added when a payment agreement is broken. This is configured on the business object lifecycle for payment agreement request on the **Broken Promise** status.

Payment Agreement Request Type

Oracle Revenue Management and Billing allows you to define, edit, copy, and delete a payment agreement request type using which you can pay current unpaid debt bills in multiple installments whose payment amount is greater than zero. A payment agreement request provides flexibility in payment of installment amount and schedule of payment.

The **Payment Agreement Request Type** screen consists of the following zones:

- Payment Agreement Request Type List on page 2226
- Payment Agreement Request Type on page 2227

Payment Agreement Request Type List

The **Payment Agreement Request Type List** zone lists payment agreement request types that are already defined in the system. It contains the following columns:

Column Name	Column Description
Payment Agreement Request Type	Displays the payment agreement request type.
Description	Displays the description of the payment agreement request type.
Edit	On clicking the **Edit** (✎) icon, the **Payment Agreement Request Type** screen appears where you can edit the details of the payment agreement request type.
Duplicate	On clicking the **Duplicate** (⧉) icon, the **Payment Agreement Request Type** screen appears where you can define a payment agreement request type using an existing payment agreement request type.
Delete	On clicking the **Delete** (🗑) icon, you can delete the payment agreement request type.
	Note: You can delete a payment agreement request type only when a payment agreement request is not yet created using the payment agreement request type.

On clicking the **Broadcast** (📡) icon corresponding to a payment agreement request type, the **Payment Agreement Request Type** zone appears with the details of the respective payment agreement request type.

Related Topics

For more information on...	See...
How to define a payment agreement request type	Defining a Payment Agreement Request Type on page 2229
How to define a characteristic for a payment agreement request type	Defining a Characteristic for a Payment Agreement Request Type on page 2233

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For more information on...	See...
How to edit a payment agreement request type	Editing a Payment Agreement Request Type on page 2234
How to copy a payment agreement request type	Copying a Payment Agreement Request Type on page 2237
How to delete a payment agreement request type	Deleting a Payment Agreement Request Type on page 2241
How to view the details of a payment agreement request type	Viewing the Payment Agreement Request Type Details on page 2241

Payment Agreement Request Type

The **Payment Agreement Request Type** zone displays the details of the payment agreement request type. This zone contains the following sections:

- **Main** - Displays the basic information about the payment agreement request type. It contains the following fields:

Field Name	Field Description
Payment Agreement Request Type	Displays the payment agreement request type.
Description	Displays the description of the payment agreement request type.
Payment Agreement Request Business Object	Indicates the business object that will be used to create the payment agreement request. In addition, a context menu (⊙) icon appears corresponding to this field which helps in navigating to other screens in the application. **Note:** It has a link. On clicking the link, the **Business Object** screen appears where you can view the details of the respective business object.
Detailed Description	Displays additional information about the payment agreement request type.
Status	Indicates the status of the payment agreement request type. The valid values are: • Active • Inactive
Status Change Notification Type	Indicates the notification type when the status of the payment agreement request type is changed. The valid values are: • Alert • Both • To Do
Approval Required	Indicates whether approval is required while creating the payment agreement request using the payment agreement request type.
Approval To Do Type	Indicates that the To Do entry of the specified To Do type must be created when the payment agreement request is submitted for approval.

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Field Name	Field Description
	Note: This field appears when the **Approval Required** option is selected. It has a link. On clicking the link, the **To Do Type** screen appears where you can view the details of the respective To Do type.
Approval To Do Role	Indicates that users with the specified To Do role can only approve a payment agreement request which is submitted for approval.
	Note: This field appears when the **Approval Required** option is selected. It has a link. On clicking the link, the **To Do Role** screen appears where you can view the details of the respective To Do role.
Submitter To Do Type	Indicates that the To Do entry of the specified To Do type must be created when the approver requests the submitter to resubmit a payment agreement request for approval.
	Note: This field appears when the **Approval Required** option is selected. It has a link. On clicking the link, the **To Do Type** screen appears where you can view the details of the respective To Do type.
Submitter To Do Role	Indicates that users with the specified To Do role can only receive the To Do that is created when the approver requests the submitter to resubmit a payment agreement request for approval.
	Note: This field appears when the **Approval Required** option is selected. It has a link. On clicking the link, the **To Do Role** screen appears where you can view the details of the respective To Do role.
Allow Partial Amount	Indicates whether partial amount is allowed while creating the payment agreement request using the payment agreement request type.

- **Characteristics** - Lists the characteristics of the payment agreement request type. It contains the following columns:

Column Name	Column Description	Mandatory (Yes Or No)
Characteristic Type	Indicates the characteristic type.	No
Characteristic Value	Displays the value of the characteristic type.	No

- **Record Actions** - This section contains the following buttons:

Button Name	Button Description
Edit	Used to edit the details of the payment agreement request type.
Delete	Used to delete the payment agreement request type.

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Button Name	Button Description
	Note: You can delete a payment agreement request type when you have not created a payment agreement request using the payment agreement request type.
Duplicate	Used to create a new payment agreement request type using an existing payment agreement request type.

- **Record Information** - This section contains the following fields:

Field Name	Field Description
Business Object	Indicates the business object using which the payment agreement request type is created.
	Note: It has a link. On clicking the link, the **Business Object** screen appears where you can view the details of the respective business object.

By default, the **Payment Agreement Request Type** zone does not appear in the **Payment Agreement Request Type** screen. It appears when you click the **Broadcast** ( ) icon corresponding to a payment agreement request type in the **Payment Agreement Request Type List** zone.

Related Topics

For more information on...	See...
Payment Agreement Request Type screen	Payment Agreement Request Type on page 2226
How to define a payment agreement request type	Defining a Payment Agreement Request Type on page 2229
How to define a characteristic for a payment agreement request type	Defining a Characteristic for a Payment Agreement Request Type on page 2233
How to edit a payment agreement request type	Editing a Payment Agreement Request Type on page 2234
How to copy a payment agreement request type	Copying a Payment Agreement Request Type on page 2237
How to delete a payment agreement request type	Deleting a Payment Agreement Request Type on page 2241
How to view the details of a payment agreement request type	Viewing the Payment Agreement Request Type Details on page 2241

Defining a Payment Agreement Request Type

Prerequisites

To define a payment agreement request type, you should have:

- Payment agreement request type business objects defined in the application.
- Payment agreement request business objects defined in the application.
- Payment agreement request information algorithm defined using the **C1-PA-INFO** algorithm type.
- Required To Do role assigned to the **C1-PAREQ** To Do type in the application.

Procedure

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To define a payment agreement request type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **P** and then click **Payment Agreement Request Type**.
   A sub-menu appears.
3. Click the **Add** option from the **Payment Agreement Request Type** sub-menu.

   The **Select Business Object** screen appears. It contains the following field:

Field Name	Field Description	Mandatory (Yes or No)
Payment Agreement Request Type Business Object	Used to indicate the business object using which you want to create the payment agreement request type. The valid value is: • **Payment Agreement Request Type (i.e. C1-PARequestType)** - Enables you to maintain a payment agreement request type.	Yes
	Note: The above business object is shipped with the product. The list includes those business objects which are created using the **Payment Agreement Request Type (i.e., C1-PARQTY)** maintenance object.	

Tip: Alternatively, you can access the **Select Business Object** screen by clicking the **Add** button in the **Page Title** area of the **Payment Agreement Request Type** screen.

Note: The **Select Business Object** screen appears when there are multiple payment agreement request type business objects defined in the application. If there is only one payment agreement request type business object defined in the application, the **Payment Agreement Request Type** screen appears.

4. Select the required payment agreement request type business object from the respective field.
5. Click **OK**.

   The **Payment Agreement Request Type** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details about the payment agreement request type.
   - **Characteristics** - Used to define the characteristics for the payment agreement request type.

   The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Payment Agreement Request Type	Used to specify the payment agreement request type.	Yes
Business Object	Indicates the business object used while defining the payment agreement request type.	Not applicable
Description	Used to specify the description for the payment agreement request type.	Yes
Payment Agreement Request Business Object	Used to indicate the business object using which you want to create the respective payment agreement request. The valid values are: • **Payment Agreement Request - Display (i.e., C1-PARequestType)** - Enables you to display the details of a payment agreement request.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	• **Payment Agreement Request - Maintenance (i.e., C1-PARQTY)** - Enables you to maintain a payment agreement request. **Note:** The above mentioned business objects are shipped with the product. The list includes those business objects which are created using the **Payment Agreement Request (i.e., C1-PAREQ)** maintenance object.	
Detailed Description	Used to specify additional information about the payment agreement request type.	No
Status	Used to indicate the status of the payment agreement request type. The valid values are: • Active • Inactive **Note:** You cannot change the status of a payment agreement request type to **Inactive** when the corresponding payment agreement request is in a status other than **Draft**, **Approval In Progress**, and **Active**.	Yes
Status Change Notification Type	Used to indicate the type of notification that you want to generate when the status of the payment agreement request type is changed. The valid values are: • Alert • To Do • Both **Note:** The list includes only those values which are defined in the **PA_STS_CHNG_NOT_TYPE** lookup field.	No
Approval Required	Used to indicate whether approval is required while creating a payment agreement request using the payment agreement request type.	No
Approval To Do Type	Used to indicate that the To Do entry of the specified To Do type must be created when a payment agreement request is submitted for approval.	Yes (Conditional)

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The **Search** (🔍) icon appears corresponding to the **Approval To Do Type** field. On clicking the **Search** icon, the **To Do Type Search** window appears. On specifying the To Do type, the description of the To Do type appears corresponding to the **Approval To Do Type** field. This field appears when the **Approval Required** check box is selected. The **C1-PAREQ** To Do type is shipped with the product. You can use the **C1-PAREQ** To Do type or a custom To Do type, if required.	**Note:** This field is required when the **Approval Required** option is selected.
Approval To Do Role	Used to indicate that users with the specified To Do role can only approve a payment agreement request which is submitted for approval. **Note:** This field appears when the **Approval Required** check box is selected. The list will include only those To Do roles which are associated with the To Do type specified in the **Approval To Do Type** field.	Yes (Conditional) **Note:** This field is required when the **Approval Required** option is selected.
Submitter To Do Type	Used to indicate that the To Do entry of the specified To Do type must be created when the approver resubmits a payment agreement request for approval. **Note:** The **Search** (🔍) icon appears corresponding to the **Approval To Do Type** field. On clicking the **Search** icon, the **To Do Type Search** window appears. On specifying the To Do type, the description of the To Do type appears corresponding to the **Approval To Do Type** field. This field appears when the **Approval Required** check box is selected.	Yes (Conditional) **Note:** This field is required when the **Approval Required** option is selected.
Submitter To Do Role	Used to indicate that the users with the specified To Do role must receive a To Do when the approver resubmits a payment agreement request for approval.	Yes (Conditional)

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Field Name	Field Description	Mandatory (Yes or No)
	Note: This field appears when the **Approval Required** check box is selected. The list will include only those To Do roles which are associated with the To Do type specified in the **Submitter To Do Type** field.	**Note:** This field is required when the **Approval Required** option is selected.
Allow Partial Amount	Used to indicate whether partial amount is allowed while creating the payment agreement request using the payment agreement request type.	No

6. Enter the required details in the **Main** section.
7. Define characteristics for the payment agreement request type, if required.
8. Click **Save**.
   The new payment agreement request type is defined.

Related Topics

For more information on...	See...
Payment Agreement Request Type screen	Payment Agreement Request Type on page 2226
Payment Agreement Request Type List zone	Payment Agreement Request Type on page 2227
How to define a characteristic for a payment agreement request type	Defining a Characteristic for a Payment Agreement Request Type on page 2233

Defining a Characteristic for a Payment Agreement Request Type

Prerequisites

To define a characteristic for a payment agreement request type, you should have:

- Characteristic types defined in the application (where the characteristic entity is set to **Payment Agreement Request Type**).

Procedure

To define a characteristic for a payment agreement request type:

1. Ensure that the **Characteristics** section is expanded when you are defining, editing, or copying a payment agreement request type.

   The **Characteristics** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Characteristic Type	Used to indicate the characteristic type.	Yes (Conditional)

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The list includes only those characteristic types where the characteristic entity is set to Payment Agreement Request Type.	**Note:** This field is required when you are defining a characteristic for the payment agreement request type.
Characteristic Value	Used to specify the value for the characteristic type.	Yes (Conditional)
	Note: If you select a predefined characteristic type, the **Search** (🔍) icon appears corresponding to the **Characteristic Value** field. On clicking the **Search** icon, you can search for a predefined characteristic value. On specifying the value for a predefined characteristic type, the description of the characteristic value appears corresponding to the **Characteristic Value** field.	**Note:** This field is required when you are defining a characteristic for the payment agreement request type.

2. Enter the required details in the **Characteristics** section.
3. If you want to define more than one characteristic for the payment agreement request type, click the **Add** (+) icon and then repeat step 2.

Note: However, if you want to remove a characteristic from the payment agreement request type, click the ***D*elete** (🗑) icon corresponding to the characteristic.

Related Topics

For more information on...	See...
How to define a payment agreement request type	Defining a Payment Agreement Request Type on page 2229
How to edit a payment agreement request type	Editing a Payment Agreement Request Type on page 2234
How to copy a payment agreement request type	Copying a Payment Agreement Request Type on page 2237

Editing a Payment Agreement Request Type

Prerequisites

To edit a payment agreement request type, you should have:

- Payment agreement request business objects defined in the application.
- Payment agreement request information algorithm defined using the **C1-PA-INFO** algorithm type.
- Required To Do role assigned to the **C1-PAREQ** To Do type in the application.

Procedure

To edit a payment agreement request type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **P** and then click **Payment Agreement Request Type**.

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A sub-menu appears.

3. Click the **Search** option from the **Payment Agreement Request Type** sub-menu.
   The **Payment Agreement Request Type** screen appears.
4. In the **Payment Agreement Request Type List** zone, click the **Edit** (✎) icon in the **Edit** column *c*orresponding to the payment agreement request type whose details you want to edit.

   The **Payment Agreement Request Type** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details about the payment agreement request type.
   - **Characteristics** - Used to define the characteristics for the payment agreement request type.

   The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Payment Agreement Request Type	Displays the payment agreement request type.	Not applicable
Business Object	Indicates the business object which is used while defining the payment agreement request type.	Not applicable
Description	Used to specify the description for the payment agreement request type.	Yes
Payment Agreement Request Business Object	Used to indicate the business object using which you want to create the respective payment agreement request. The valid values are: • **Payment Agreement Request - Display (i.e., C1-PARequestType)** - Enables you to display the details of a payment agreement request. • **Payment Agreement Request - Maintenance (i.e., C1-PARQTY)** - Enables you to maintain a payment agreement request. **Note:** The above mentioned business objects are shipped with the product. The list includes those business objects which are created using the **Payment Agreement Request (i.e., C1-PAREQ)** maintenance object.	Yes
Detailed Description	Used to specify additional information about the payment agreement request type.	No
Status	Used to indicate the status of the payment agreement request type. The valid values are: • Active • Inactive **Note:** You cannot change the status of a payment agreement request type to **Inactive** when the corresponding payment agreement request is in a status other than **Draft**, **Approval In Progress**, and **Active**.	Yes
Status Change Notification Type	Used to indicate the type of notification that you want to generate when the status of the payment agreement request type is changed. The valid values are: • Alert • To Do	No

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Field Name	Field Description	Mandatory (Yes or No)
	• Both **Note:** The list includes only those values which are defined in the **PA_STS_CHNG_NOT_TYPE** lookup field.	
Approval Required	Used to indicate whether approval is required while creating a payment agreement request using the payment agreement request type.	Yes
Approval To Do Type	Used to indicate that the To Do entry of the specified To Do type must be created when a payment agreement request is submitted for approval. **Note:** The **Search** (🔍) icon appears corresponding to the **Approval To Do Type** field. On clicking the **Search** icon, the **To Do Type Search** window appears. On specifying the To Do type, the description of the To Do type appears corresponding to the **Approval To Do Type** field. This field appears when the **Approval Required** check box is selected. The **C1-PAREQ** To Do type is shipped with the product. You can use the **C1-PAREQ** To Do type or a custom To Do type, if required.	Yes (Conditional) **Note:** This field is required when the **Approval Required** check box is selected.
Approval To Do Role	Used to indicate that users with the specified To Do role can only approve a payment agreement request which is submitted for approval. **Note:** This field appears when the **Approval Required** check box is selected. The list will include only those To Do roles which are associated with the To Do type specified in the **Approval To Do Type** field.	Yes (Conditional) **Note:** This field is required when the **Approval Required** check box is selected.
Submitter To Do Type	Used to indicate that the To Do entry of the specified To Do type must be created when the approver resubmits a payment agreement request for approval.	Yes (Conditional)

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The **Search** (🔍) icon appears corresponding to the **Approval To Do Type** field. On clicking the **Search** icon, the **To Do Type Search** window appears. On specifying the To Do type, the description of the To Do type appears corresponding to the **Approval To Do Type** field. This field appears when the **Approval Required** check box is selected.	**Note:** This field is required when the **Approval Required** check box is selected.
Submitter To Do Role	Used to indicate that the users with the specified To Do role must receive a To Do when the approver resubmits a payment agreement request for approval. **Note:** This field appears when the **Approval Required** check box is selected. The list will include only those To Do roles which are associated with the To Do type specified in the **Submitter To Do Type** field.	Yes (Conditional) **Note:** This field is required when the **Approval Required** check box is selected.
Allow Partial Amount	Used to indicate whether partial amount is allowed while creating the payment agreement request using the payment agreement request type.	No

Tip: Alternatively, you can click the **Edit** button in the **Payment Agreement Request Type** zone to edit the details of the payment agreement request type.

5. Modify the required details in the **Main** section.
6. Define, edit, or remove characteristics of the payment agreement request type, if required.
7. Click **Save**.
   The changes made to the payment agreement request type are saved.

Related Topics

For more information on...	See...
Payment Agreement Request Type screen	Payment Agreement Request Type on page 2226
Payment Agreement Request Type List zone	Payment Agreement Request Type List on page 2226
Payment Agreement Request Type zone	Payment Agreement Request Type on page 2227
How to define a characteristic for a payment agreement request type	Defining a Characteristic for a Payment Agreement Request Type on page 2233

Copying a Payment Agreement Request Type

Instead of creating a payment agreement request type from scratch, you can create a new payment agreement request type using an existing payment agreement request type. This is possible through copying a payment agreement request

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type. On copying a payment agreement request type, the details including the characteristics are copied to the new payment agreement request type. You can then edit the details, if required.

Prerequisites

To copy a payment agreement request type, you should have:

- Payment agreement request type (whose copy you want to create) defined in the application
- Payment agreement request business objects defined in the application
- Payment agreement request information algorithm defined using the **C1-PA-INFO** algorithm type.
- Required To Do role assigned to the **C1-PAREQ** To Do type in the application.

Procedure

To copy a payment agreement request type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **P** and then click **Payment Agreement Request Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Payment Agreement Request Type** sub-menu.
   The **Payment Agreement Request Type** screen appears.
4. In the **Payment Agreement Request Type List** zone, click the **Duplicate** (⧉) icon in the **Duplicate** column corresponding to the payment agreement request type whose copy you want to create.

   The **Payment Agreement Request Type** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details about the payment agreement request type.
   - **Characteristics** - Used to define the characteristics for the payment agreement request type.

   The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Payment Agreement Request Type	Used to specify the payment agreement request type.	Yes
Business Object	Indicates the business object used while defining the payment agreement request type.	Not applicable
Description	Used to specify the description for the payment agreement request type.	Yes
Payment Agreement Request Business Object	Used to indicate the business object using which you want to create the respective payment agreement request. The valid values are: • **Payment Agreement Request - Display (i.e., C1-PARequestType)** - Enables you to display the details of a payment agreement request. • **Payment Agreement Request - Maintenance (i.e., C1-PARQTY)** - Enables you to maintain a payment agreement request.	Yes
	Note: The above mentioned business objects are shipped with the product. The list includes those business objects which are created using the **Payment Agreement Request (i.e., C1-PAREQ)** maintenance object.	

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Field Name	Field Description	Mandatory (Yes or No)
Detailed Description	Used to specify additional information about the payment agreement request type.	No
Status	Used to indicate the status of the payment agreement request type. The valid values are: • Active • Inactive **Note:** You cannot change the status of a payment agreement request type to **Inactive** when the corresponding payment agreement request is in a status other than **Draft**, **Approval In Progress**, and **Active**.	Yes
Status Change Notification Type	Used to indicate the type of notification that you want to generate when the status of the payment agreement request type is changed. The valid values are: • Alert • To Do • Both **Note:** The list includes only those values which are defined in the **PA_STS_CHNG_NOT_TYPE** lookup field.	No
Approval Required	Used to indicate whether approval is required while creating a payment agreement request using the payment agreement request type.	Yes
Approval To Do Type	Used to indicate that the To Do entry of the specified To Do type must be created when a payment agreement request is submitted for approval. **Note:** The **Search** (🔍) icon appears corresponding to the **Approval To Do Type** field. On clicking the **Search** icon, the **To Do Type Search** window appears. On specifying the To Do type, the description of the To Do type appears corresponding to the **Approval To Do Type** field. This field appears when the **Approval Required** check box is selected. The **C1-PAREQ** To Do type is shipped with the product. You can use the **C1-PAREQ** To Do type or a custom To Do type, if required.	Yes (Conditional) **Note:** This field is required when the **Approval Required** check box is selected.
Approval To Do Role	Used to indicate that users with the specified To Do role can only approve a payment agreement request which is submitted for approval.	Yes (Conditional)

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Field Name	Field Description	Mandatory (Yes or No)
	Note: This field appears when the **Approval Required** check box is selected. The list will include only those To Do roles which are associated with the To Do type specified in the **Approval To Do Type** field.	**Note:** This field is required when the **Approval Required** check box is selected.
Submitter To Do Type	Used to indicate that the To Do entry of the specified To Do type must be created when the approver resubmits a payment agreement request for approval. **Note:** The **Search** (🔍) icon appears corresponding to the **Approval To Do Type** field. On clicking the **Search** icon, the **To Do Type Search** window appears. On specifying the To Do type, the description of the To Do type appears corresponding to the **Approval To Do Type** field. This field appears when the **Approval Required** check box is selected.	Yes (Conditional) **Note:** This field is required when the **Approval Required** check box is selected.
Submitter To Do Role	Used to indicate that the users with the specified To Do role must receive a To Do when the approver resubmits a payment agreement request for approval. **Note:** This field appears when the **Approval Required** check box is selected. The list will include only those To Do roles which are associated with the To Do type specified in the **Submitter To Do Type** field.	Yes (Conditional) **Note:** This field is required when the **Approval Required** check box is selected.
Allow Partial Amount	Used to indicate whether partial amount is allowed while creating the payment agreement request using the payment agreement request type.	No

Tip: Alternatively, you can click the **Duplicate** button in the **Payment Agreement Request Type** zone to create a copy of the payment agreement request type.

5. Enter the required details in the **Main** section.
6. Define, edit, or remove characteristics of the payment agreement request type, if required.
7. Click **Save**.
   The new payment agreement request type is defined.

Related Topics

For more information on...	See...
Payment Agreement Request Type screen	Payment Agreement Request Type on page 2226

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For more information on...	See...
Payment Agreement Request Type List zone	Payment Agreement Request Type List on page 2226
Payment Agreement Request Type zone	Payment Agreement Request Type on page 2227
How to define a characteristic for a payment agreement request type	Defining a Characteristic for a Payment Agreement Request Type on page 2233

Deleting a Payment Agreement Request Type

Procedure

To delete a payment agreement request type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **P** and then click **Payment Agreement Request Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Payment Agreement Request Type** sub-menu.
   The **Payment Agreement Request Type** screen appears.
4. In the **Payment Agreement Request Type List** zone, click the **Delete** ( ) icon in the **Delete** column corresponding to the payment agreement request type that you want to delete.
   A message appears confirming whether you want to delete the payment agreement request type.

   Note: You can delete a payment agreement request type only when you have not created a payment agreement request using the payment agreement request type.

   Tip: Alternatively, you can click the **Delete** button in the **Payment Agreement Request Type** zone to delete the payment agreement request type.
5. Click **OK**.
   The payment agreement request type is deleted.

Related Topics

For more information on...	See...
Payment Agreement Request Type screen	Payment Agreement Request Type on page 2226
Payment Agreement Request Type List zone	Payment Agreement Request Type List on page 2226
Payment Agreement Request Type zone	Payment Agreement Request Type on page 2227

Viewing the Payment Agreement Request Type Details

Procedure

To view the details of a payment agreement request type:

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1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **P** and then click **Payment Agreement Request Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Payment Agreement Request Type** sub-menu.
   The **Payment Agreement Request Type** screen appears.
4. In the **Payment Agreement Request Type List** zone, click the **Broadcast** (ᯤ) icon corresponding to the *p*ayment agreement request type whose details you want to view.
   The **Payment Agreement Request Type** zone appears.
5. View the details of the payment agreement request type in the **Payment Agreement Request Type** zone.

Related Topics

For more information on...	See...
Payment Agreement Request Type screen	Payment Agreement Request Type on page 2226
Payment Agreement Request Type List zone	Payment Agreement Request Type List on page 2226
Payment Agreement Request Type zone	Payment Agreement Request Type on page 2227

Payment Agreement Request (Used for Searching)

The **Payment Agreement Request** screen allows you to search for a payment agreement request through various search criteria. It also allows you to create a hold request. It contains the following zone:

- Search Payment Agreement Request on page 2242

Through this screen, you can navigate to the following screen:

- Payment Agreement Request (Used for Viewing) on page 2253

Search Payment Agreement Request

The **Search Payment Agreement Request** zone allows you to search for a payment agreement request using various search criteria. This zone contains the following two sections:

- **Search Criteria** - The **Search Criteria** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Search By	Used to indicate whether you want to search for a payment agreement request using request or bill details. The valid values are: • Request Details • Bill Details **Note:** By default, the **Request Details** option is selected.	Yes
Payment Agreement Request ID	Used to search a particular payment agreement request.	No

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Field Name	Field Description	Mandatory (Yes or No)
	Note: This field appears when you select the **Request Details** option from the **Search By** list.	
Payment Agreement Request Type	Used to search payment agreement requests which are created using a particular payment agreement request type. **Note:** This field appears when you select the **Request Details** option from the **Search By** list.	No
Status	Used to search payment agreement requests with a particular status. The valid values are: • Active • Approval In Progress • Broken Promise • Draft • Kept Promise • Rejected **Note:** This field appears when you select the **Request Details** option from the **Search By** list.	No
Entity Type	Used to search for payment agreement requests which are created for a particular entity type. The valid values are: • Account • Person **Note:** This field appears when you select the **Request Details** option from the **Search By** list. The list includes only those values which are defined in the **PA_ENTITY_TYPE_FLG** lookup field. By default, the **Account** option is selected.	No
Created From	Used to search for payment agreement requests which are created on or after the specified date. **Note:** This field appears when you select the **Request Details** option from the **Search By** list. You can either manually specify the date or select it using the **Date Picker** ( ) icon corresponding to the field. Simultaneously, you can also specify the time or select it using the **Time Picker** ( ) icon corresponding to the field. The creation from date cannot be later than the created to date.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
Entity ID	Used to search for payment agreement requests which are created for a particular entity. **Note:** This field appears when you select the **Request Details** option from the **Search By** list. The **Search** (🔍) icon appears corresponding to the **Entity ID** field. On clicking the **Search** icon, the **Account Search** window appears.	
Created To	Used to search for payment agreement requests which are created till a particular date. **Note:** This field appears when you select the **Request Details** option from the **Search By** list. You can either manually specify the date or select it using the **Date Picker** (📅) icon corresponding to the field. Simultaneously, you can also specify the time or select it using the **Time Picker** (🕒) icon corresponding to the field. The creation to date cannot be earlier than the created from date.	No
Delinquency Process ID	Used to search for payment agreement requests which are created for a particular delinquency process. **Note:** This field appears when you select the **Request Details** option from the **Search By** list. The **Search** (🔍) icon appears corresponding to the **Delinquency Process ID** field. On clicking the **Search** icon, the **Delinquency Process Search** window appears.	No
Bill ID	Used to search for payment agreement requests which are created for a particular bill ID. **Note:** You can search for a bill by clicking the **Search** (🔍) icon corresponding to the field. This field appears when you select the **Bill Details** option from the **Search By** list.	No
Bill Date From	Used to search bills which are created from a particular date onwards.	No

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Field Name	Field Description	Mandatory (Yes or No)
	Note: This field appears when you select the **Bill Details** option from the **Search By** list.	
Alternate Bill ID	Used to search a particular bill using the alternate bill ID. **Note:** This field appears when you select the **Bill Details** option from the **Search By** list.	No
Bill Date To	Used to search bills which are created till a particular date. **Note:** This field appears when you select the **Bill Details** option from the **Search By** list.	No

Note: You must specify at least one search criterion while searching for a payment agreement request.

- **Search Results** - On clicking the **Search** button, the search results appear based on the specified search criteria. The **Search Results** section contains the following columns:

Column Name	Column Description
Create Date/Time	Displays the date and time when the payment agreement request is created.
Payment Agreement Request Information	Displays information about the payment agreement request. **Note:** It has a link. On clicking the link, the **Payment Agreement Request** screen appears where you can view the details of the respective payment agreement request.
Schedule Amount	Displays the amount which is scheduled for payment. **Note:** This column appears only when you select the **Bill Details** option from the **Search By** list.
Status	Indicates the status of the payment agreement request. The valid values are: • Active • Approval In Progress • Broken Promise • Draft • Kept Promise • Rejected
Last Updated Date Time	Displays the most recent date and time when the payment agreement request is updated.
Total Unpaid Amount	Displays the remaining balance of all the debit bills which are not been fully paid or matched against the corresponding credit bills. **Note:** This column appears only when you select the **Request Details** option from the **Search By** list.
Entity Type	Indicates the entity type for which the payment agreement request is created.

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Column Name	Column Description
Entity Information	Displays information about the account or person. In addition, a context menu (⊙) icon appears corresponding to this field which helps in navigating to other screens in the application.
	Note: It has a link. If you have created a payment agreement request for an account entity, the system displays the link of the **Account** screen else the system displays the link of the **Person** screen where you can view the details of the respective entity.

Note: Pagination is used to display limited number of records in the **Search Results** section. You can use the navigation links, such as **Previous** and **Next** to navigate between pages. Note that navigation links appear in the **Search Results** section only when the records in the search results exceed 20.

Related Topics

For more information on...	See...
How to search for a payment agreement request	Searching for a Payment Agreement Request on page 2247
How to create a payment agreement request	Creating a Payment Agreement Request on page 2247
How to view the details of a payment agreement request	Viewing the Payment Agreement Request Details on page 2252

Bill Details

The **Bill Details** zone lists the details of the unpaid debit bills. This zone contains the following columns:

Column Name	Column Description
Bill Information	Indicates the bill against which the payment agreement request is created. In addition, a context menu (⊙) icon appears corresponding to this field which helps in navigating to other screens in the application.
	Note: It has a link. On clicking the link, the **Bill** screen appears with the details of the respective bill.
Bill Amount	Displays the initial amount of a bill before any subsequent bill revisions are applied.
Unpaid Amount	Displays the outstanding amount owed on a bill.
Due Date	Displays the date when the payment must be made for the billed amount.

By default, the **Bill Details** zone does not appear in the **Payment Agreement Request** screen. It appears when you click the **Broadcast** (📡) icon corresponding to the payment agreement request in the **Search Payment Agreement Request** zone.

You can change the layout of this zone. For more information on how to change the layout, see Changing the Layout on page 4410.

Related Topics

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For more information on...	See...
How to view bills added in the payment agreement request	Viewing the Bills Added in the Payment Agreement Request on page 2251

Searching for a Payment Agreement Request

Prerequisites

To search for a payment agreement request, you should have:

- Payment agreement request types defined in the application.

Procedure

To search for a payment agreement request:

1. Click the **Menu** link in the **Application** toolbar.
   A list appears.
2. From the **Main** menu, select **Delinquency Management** and then click **Payment Agreement Request**.
   A sub-menu appears.
3. Click the **Search** option from the **Payment Agreement Request** sub-menu.
   The **Payment Agreement Request** screen appears.
4. Enter the search criteria in the **Search Payment Agreement Request** zone.

   Note: ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.
5. Click **Search**.
   A list of payment agreement requests that meet the search criteria appears in the **Search Results** section.

Related Topics

For more information on...	See...
Payment Agreement Request screen	Payment Agreement Request (Used for Searching) on page 2242
Search Payment Agreement Request zone	Search Payment Agreement Request on page 2242

Creating a Payment Agreement Request

Prerequisites

To create a payment agreement request, you should have:

- Payment agreement request types defined in the application.

Procedure

To create a payment agreement request:

1. Click the **Menu** link in the **Application** toolbar.
   A list appears.

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2. From the **Main** menu, select **Delinquency Management** and then click **Payment Agreement Request**. A sub-menu appears.
3. Click the **Add** option from the **Payment Agreement Request** sub-menu.

   The **Add Payment Agreement Request** screen appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Payment Agreement Request Type	Used to indicate the payment agreement request type using which you want to create the payment agreement request.	Yes
Entity Type	Used to indicate the entity type for payment agreement request. The valid values are: • Account • Person **Note:** The list includes only those values which are defined in the **PA_ENTITY_TYPE_FLG** lookup field. By default, the **Account** option is selected.	Yes
Entity ID	Used to indicate the account for which you want to create the payment agreement request. **Note:** The **Search** (🔍) icon appears corresponding to the **Entity ID** field. On clicking the **Search** icon, the **Account Search** window appears. On specifying the account, the description of the account appears corresponding to the **Account** field.	Yes
Linked to Delinquency Process	Used to indicate whether the payment agreement request should be linked with the delinquency process.	No
Delinquency Process ID	Used to indicate the delinquency process which should be linked with the payment agreement request. **Note:** This field appears only when the **Linked to Delinquency Process** option is selected. The **Search** (🔍) icon appears corresponding to the **Delinquency Process ID** field. On clicking the **Search** icon, the **Delinquency Process Search** window appears. On specifying the delinquency process ID, the description of the delinquency process ID appears corresponding to the **Delinquency Process ID** field.	Yes (Conditional) **Note:** This field is required when the **Linked to Delinquency Process** option is selected.

Tip: Alternatively, you can access the **Add Payment Agreement Request** screen by clicking the **Add** button in the **Page Title** area of the **Payment Agreement Request** screen.

4. Enter the required fields.

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5. Click **OK**.
   The payment agreement request is created and the status of the payment agreement request is set to **Draft**. The **Payment Agreement Request** screen appears with the details of the payment agreement request.

> **Note:**
>
> You cannot create a payment agreement request for a delinquency process when the same delinquency process is associated with another payment agreement request.
>
> You can associate a delinquency process with a payment agreement request only when the delinquency process is not in any of the following statuses:
>
> - **Canceled**
> - **Terminated**
> - **Completed**

Related Topics

For more information on...	See...
Payment Agreement Request screen	Payment Agreement Request (Used for Viewing) on page 2253
How to edit a payment agreement request	Editing a Payment Agreement Request on page 2259

Defining a Characteristic for a Payment Agreement Request

Prerequisites

To define a characteristic for a payment agreement request:

- Characteristic types defined in the application (where the characteristic entity is set to **Payment Agreement Request**).

Procedure

To define a characteristic for a payment agreement request:

1. Ensure that the **Characteristics** section is expanded when you are editing, submitting, approving, rejecting or *r*esubmitting a payment agreement.

   The **Characteristics** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Effective Date	Used to indicate the date from when the characteristic is effective for the payment agreement request. **Note:** You can either manually specify the date or select it using the **Date Picker** ( ) icon corresponding to the field.	Yes (Conditional) **Note:** This field is required when you are defining a characteristic for the payment agreement request.
Characteristic Type	Used to indicate the characteristic type. **Note:** The list includes only those characteristic types where the characteristic entity is set to **payment agreement request**.	Yes (Conditional) **Note:** This field is required when you are defining a characteristic for the payment agreement request.

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Field Name	Field Description	Mandatory (Yes or No)
Characteristic Value	Used to specify the value for the characteristic type.	Yes (Conditional)
	Note: If you select a predefined characteristic type, the **Search** (🔍) icon appears corresponding to the **Characteristic Value** field. On clicking the **Search** icon, you can search for a predefined characteristic value. On specifying the value for a predefined characteristic type, the description of the characteristic value appears corresponding to the **Characteristic Value** field.	**Note:** This field is required when you are defining a characteristic for the payment agreement request.

2. Enter the required details.
3. If you want to define more than one characteristic for the payment agreement request, click the **Add** (+) icon *a*nd then repeat step 2.

Note: However, if you want to remove a characteristic from the payment agreement request, click the **Delete** (🗑) icon corresponding to the characteristic.

Related Topics

For more information on...	See...
How to create a payment agreement request	Creating a Payment Agreement Request on page 2247
How to edit a payment agreement request	Editing a Payment Agreement Request on page 2259

Defining a Payment Schedule for a Payment Agreement Request

Prerequisites

To define a payment schedule for a payment agreement request, you should have:

- The auto pay process defined for the respective account in the application.

Procedure

To define a payment schedule for a payment agreement request:

1. Ensure that the **Payment Schedule** section is expanded when you *a*re editing, submitting, approving, rejecting, or resubmitting a payment agreement request.

   The **Payment Schedule** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Schedule Date	Used to specify the date on which the payment is scheduled.	Yes (Conditional)

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Field Name	Field Description	Mandatory (Yes or No)
	Note: You can either manually specify the date or select it using the **Date Picker** ( ) icon corresponding to the field. The schedule date must be later than the system date.	**Note:** This field is required when you specify the amount in the **Schedule Amount** field. The schedule date must be later than the system date.
Schedule Amount	Used to specify the amount of the unpaid bills which is scheduled to be paid in installments.	Yes (Conditional) **Note:** This field is required when you specify the date in the **Schedule Date** field.
Auto Pay ID	Used to indicate the auto pay ID of the payor.	Yes (Conditional)
	Note: This field is enabled when you select an option from the **Pay Method** list in the **Main** section of the **Payment Agreement Request** screen for which the automatic payment process is applicable. You must set the **Grace Days** option to zero in the **Pay Method** screen against a respective payment method for which you want the automatic payment process to take place. The **Search** ( ) icon appears corresponding to this field. On clicking the **Search** icon, the **Auto Pay ID Search** window appears.	**Note:** This field is required when you select an option from the **Pay Method** list in the **Main** section of the **Payment Agreement Request** screen.

2. Enter the required details.
3. If you want to define more than one payment schedule for the payment agreement request, click the **Add** (+) icon and then repeat step 2.

Note: However, if you want to remove a payment schedule from the payment agreement *r*equest, click the **Delete** ( ) icon corresponding to the payment schedule.

Related Topics

For more information on...	See...
How to create a payment agreement request	Creating a Payment Agreement Request on page 2247
How to edit a payment agreement request	Editing a Payment Agreement Request on page 2259

Viewing the Bills Added in the Payment Agreement Request

Procedure

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To view the bills added in the payment agreement request:

1. Search for the payment agreement request in the **Payment Agreement Request** screen.
2. In the **Search Results** section, click the **Broadcast** (ᯤ) icon corresponding to the payment agreement *r*equest whose bill details you want to view.
   The **Bill Details** zone appears.
3. View the details of the bills in the **Bill Details** zone.

Related Topics

For more information on...	See...
Payment Agreement Request screen	Payment Agreement Request (Used for Searching) on page 2242
Searching for a payment agreement request	Searching for a Payment Agreement Request on page 2247
Bill Details zone	Bill Details on page 2246

Viewing the Payment Agreement Request Details

Procedure

To view the details of a payment agreement request:

1. Search for the payment agreement request in the **Payment Agreement Request** screen.
2. In the **Search Results** section, click the link in the **Payment Agreement Request Information** column *c*orresponding to the payment agreement request whose details you want to view.

   The **Payment Agreement Request** screen appears. It consists of the following tabs:

   - Payment Agreement Request - Main on page 2253
   - Payment Agreement Request - Bills on page 2257
   - Payment Agreement Request - Log on page 2258
3. Ensure that the **Main** tab is selected.
4. View the details of the payment agreement request in the **Payment Agreement Request** zone.
5. View the bill details in the **Bill Details** zone.
6. View the payment schedule details in the **Payment Schedule** zone.

Related Topics

For more information on...	See...
How to search for a payment agreement request	Searching for a Payment Agreement Request on page 2247
Payment Agreement Request screen	Payment Agreement Request (Used for Viewing) on page 2253
Payment Agreement Request zone	Payment Agreement Request on page 2253
Bill Details zone	Bill Details on page 2256
Payment Schedule zone	Payment Schedule on page 2256

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Payment Agreement Request (Used for Viewing)

The **Payment Agreement Request** screen allows you to:

- View the details of a payment agreement request
- View the details of a bill added in a payment agreement request
- View the details of a payment schedule
- Edit a payment agreement request
- Delete a payment agreement request
- Delete a bill from a payment agreement request
- Submit a payment agreement request for approval
- Approve or reject a payment agreement request
- Resubmit a payment agreement request
- Filter an overdue bill of an account
- Add an overdue bill in a payment agreement request
- View the log of a payment agreement request
- Add a log entry for a payment agreement request

It consists of the following tabs:

- Payment Agreement Request - Main on page 2253
- Payment Agreement Request - Bills on page 2257
- Payment Agreement Request - Log on page 2258

Payment Agreement Request - Main

The **Main** tab displays information about the payment agreement request. It contains the following zones:

- Payment Agreement Request on page 2253
- Bill Details on page 2256
- Payment Schedule on page 2256

Payment Agreement Request

The **Payment Agreement Request** zone displays the details of the payment agreement request. It contains the following sections:

- **Main** - Displays basic information about the payment agreement request. It contains the following fields:

Field Name	Field Description
Payment Agreement Request Information	Displays information about the payment agreement request.
Payment Agreement Request Type	Indicates the payment agreement request type using which the payment agreement request is created.
	Note: It has a link. On clicking the link, the **Payment Agreement Request Type** screen appears where you can view the details of the payment agreement request type.
Entity Information	Displays information about the account or person.

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Field Name	Field Description
	Note: It has a link. On clicking the link, the **Account** screen appears where you can view the details of the respective account.
Entity Type	Indicates the entity type for which the payment agreement request is created. The valid values are: • Account • Person
Status	Indicates the status of the payment agreement request. The valid values are: • Active • Approval In Progress • Broken Promise • Draft • Kept Promise • Rejected
Third Party Payor	Indicates an external party who is responsible for paying the amount on behalf of the payor account.
Description	Indicates the description of the third party payor.
Payor Account ID	Displays the payment agreement requests which are created for a particular payor account. In addition, a context menu (⊙) icon appears corresponding to this field which helps in navigating to other screens in the application.
	Note: It has a link. On clicking the link, the **Account** screen appears where you can view the details of the respective payor account.
Pay Method	Displays the method using which the payment is made.
Total Unpaid Amount	Displays the remaining balance of all the debit bills which are not been fully paid or matched by the corresponding credit bills.
Total Future Schedule Amount	Displays the total remaining balance which is scheduled for payment.
Total Payment Agreement Amount	Displays the total amount of the payment which is made against the payment agreement.

- **Record Actions** - Enables you to perform various actions on the payment agreement request. It contains the following buttons:

Column Name	Column Description
Edit	Used to edit the details of the payment agreement request.
	Note: The **Edit** button appears when the payment agreement request is in the **Active** or **Draft** status.
Delete	Used to delete the payment agreement request.
	Note: The **Delete** button appears when the payment agreement request is in the **Draft** status.
Submit	Used to submit the payment agreement request for approval.

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Column Name	Column Description
	Note: The **Submit** button appears when the payment agreement request is in the **Draft** status.
Approve	Used to approve the payment agreement request.
	Note: The **Approve** button appears when: • The payment agreement request is in the **Approval In Progress** status. • A user with the approval To Do role is reviewing the payment agreement request.
Reject	Used to reject the payment agreement request.
	Note: The **Reject** button appears when: • The payment agreement request is in the **Approval In Progress** status. • A user with the approval To Do role is reviewing the payment agreement request.
Resubmit	Used to request the user for resubmitting the payment agreement request for approval.
	Note: The **Resubmit** button appears when: • The payment agreement request is in the **Approval In Progress** status. • A user with the approval To Do role is reviewing the payment agreement request.

- **Record Information** - This section contains the following fields:

Field Name	Field Description
Business Object	Indicates the business object using which the payment agreement request is created.
	Note: It has a link. On clicking the link, the **Business Object** screen appears where you can view the details of the respective business object.
Status Date/Time	Displays the date and time when the payment agreement request status is updated.
Create Date/Time	Displays the date and time when the payment agreement request is created.

- **Characteristics** - This section lists the characteristics of the payment agreement request. It contains the following columns:

Column Name	Column Description
Effective Date	Displays the date from when the characteristic is effective for the payment agreement request.
Characteristic Type	Indicates the characteristic type.
Characteristic Value	Displays the value of the characteristic type.

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Bill Details

The **Bill Details** zone displays the bills that are added in the payment agreement request. This zone contains the following columns:

Column Name	Column Description
Bill Information	Displays information about the bill. In addition, a context menu (⊙) icon appears corresponding to this field which helps in navigating to other screens in the application.
	Note: It has a link. On clicking the link, the **Bill** screen appears where you can view the details of the respective bill.
Original Bill Amount	Displays the initial amount of a bill before any revisions or adjustments are applied.
Due Date	Displays the date when the payment must be made for the billed amount.
Current Bill Balance	Displays the outstanding amount owed on a bill.
Overdue Process Information	Displays information about the overdue process. In addition, a context menu (⊙) icon appears corresponding to this field which helps in navigating to other screens in the application.
	Note: It has a link. On clicking the link, the **Overdue Process** screen appears where you can view the details of the respective overdue process.

Note:

The **Delete** button appears only when the payment agreement request is in the **Draft** status.

To delete a bill, select the check box corresponding to the bill and click the **Delete** button. You can also select multiple bills at the same time. In addition, you can select the check box corresponding to the column header. This allows you to delete all the bills listed in the respective page.

Pagination is used to display limited number of records in the **Bill Details** zone. You can use the navigation links, such as **Previous** and **Next** to navigate between pages. Note that the navigation links appear in the **Bill Details** zone only when the records exceed 20.

Bills which are added in the payment agreement request must have the same currency.

Payment Schedule

The **Payment Schedule** zone displays the payments scheduled for the bills which are added in the payment agreement request. It contains the following columns:

Column Name	Column Description
Schedule Date	Displays the date on which the payment is made for the outstanding bill.
Schedule Amount	Displays the amount of the bill which is scheduled for payment in installments.
Auto Pay ID	Indicates the automatic payment ID of the payor.
Payment Event	Indicates the payment event whose frozen payment you want to transfer.
	Note: It has a link. On clicking the link, the **Payment Event** screen appears where you can view the details of the respective payment event.

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Note: Pagination is used to display limited number of records in the **Payment Schedule** zone. You can use the navigation links, such as **Previous** and **Next** to navigate between pages. Note that the navigation links appear in the **Payment Schedule** zone only when the records exceed 20.

Payment Agreement Request - Bills

The **Bills** tab contains the following zone:

- Search Bills on page 2257

Note: The **Bills** tab appears only when the payment agreement request is in the **Draft** status.

Search Bills

The **Search Bills** zone allows you to search for overdue bills (of an account) using various search criteria. It also allows you to add the overdue bills in the payment agreement request. It contains the following two sections:

- **Search Criteria** - The **Search Criteria** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Search By	Used to indicate that you want to search for overdue bills using the bill details. The valid value is: • Bill Details **Note:** By default, the **Bill Details** option is selected.	Yes
Bill ID	Used to search for a particular bill. **Note:** The **Search** (🔍) icon appears corresponding to the **Bill ID** field. On clicking the **Search** icon, the **Bill Search** window appears.	No
Bill Date From	Used to search the overdue bills which are created from a particular date onwards.	No
Bill Date To	Used to search the overdue bills which are created till a particular date.	No

- **Search Results** - On clicking the **Search** button, the search results appear based on the specified search criteria. The **Search Results** section contains the following columns:

Column Name	Column Description
Bill ID	Displays the bill ID.
Bill Information	Displays additional information about the bill. In addition, a context menu (⌄) icon appears corresponding to this field which helps in navigating to other screens in the application. **Note:** It has a link. On clicking the link, the **Bill** screen appears with the details of the respective bill.
Unpaid Amount	Displays the remaining balance of the respective debit bill which is not been fully paid or matched by the corresponding credit bill.

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Column Name	Column Description
Person Name	Displays the name of the person to whom the account belongs.
Account	Displays information about the account. In addition, a context menu (⊙) icon appears corresponding to this field which helps in navigating to other screens in the application.
	Note: It has a link. On clicking the link, the **Account** screen appears where you can view the details of the respective account.
Overdue Process Information	Displays information about the overdue process. In addition, a context menu (⊙) icon appears corresponding to this field which helps in navigating to other screens in the application.
	Note: It has a link. On clicking the link, the **Overdue Process** screen appears where you can view the details of the respective overdue process.

In addition, this section contains the following button:

Button Name	Button Description
Add	Used to add a bill to the payment agreement request.

A check box appears corresponding to each bill. On selecting the check box, you can add the bill to the payment agreement request. You can also select multiple bills at the same time. In addition, you can select the check box corresponding to the column header. This allows you to add all the bills listed in the respective page to the payment agreement request.

Note: Pagination is used to display limited number of records in the **Bill Details** zone. You can use the navigation links, such as **Previous** and **Next** to navigate between pages. Note that the navigation links appear in the **Bill Details** zone only when the records exceed 20.

Related Topics

For more information on...	See...
How to search for a payment agreement request	Searching for a Payment Agreement Request on page 2247
How to create a payment agreement request	Creating a Payment Agreement Request on page 2247
How to view the details of a payment agreement request	Viewing the Payment Agreement Request Details on page 2252

Payment Agreement Request - Log

The **Log** tab contains the following zone:

- Payment Agreement Request Log on page 2258

Payment Agreement Request Log

The **Payment Agreement Request Log** zone on the **Payment Agreement Request** screen lists the complete trail of actions performed on the payment agreement request. This zone contains the following columns:

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Column Name	Column Description
Date/Time	Displays the date and time when the action was performed on the payment agreement request.
Details	Displays the details about the action performed on the payment agreement request.
User	Indicates the user who has performed the action on the payment agreement request.
Log Type	Indicates the type of log.
Related Object	Indicates the object or entity which is generated when the action is performed on the payment agreement request.
Status Reason	Displays the status reason of action performed on the payment agreement request.
Old Payment Schedule	Displays the details of old payment schedule.

Note: You can manually add a log entry for the payment agreement request by clicking the **Add Log Entry** link in the upper right corner of the **Payment Agreement Request Log** zone.

The **Add Payment Agreement Request Log** window appears. Enter **Log Details** and click **Save**. The payment agreement request log is added.

Related Topics

For more information on...	See...
How to view the log of a payment agreement request	Viewing the Log of a Payment Agreement Request on page 2271
How to add the log for a payment agreement request	Adding a Log Entry for a Payment Agreement Request on page 2271

Editing a Payment Agreement Request

Procedure

To edit a payment agreement request:

1. Search for the payment agreement request in the **Payment Agreement Request** screen.
2. In the **Search Results** section, click the link in the **Payment Agreement Request Information** column corresponding to the payment agreement request whose details you want to edit.
   The **Payment Agreement Request** screen appears.
3. Click the **Edit** button in the **Payment Agreement Request** zone.

   The **Payment Agreement Request** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details about the payment agreement request.
   - **Bill Details** - Used to specify the bill details in the payment agreement request.
   - **Payment Schedule** - Used to specify the payment schedule details in the payment agreement request.

   The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Payment Agreement Request Information	Displays information about the payment agreement request.	Not applicable

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Field Name	Field Description	Mandatory (Yes or No)
Payment Agreement Request Type	Indicates the payment agreement request type using which the payment agreement request is created.	Not applicable
Entity Information	Used to indicate the entity for which the payment agreement request is created.	Not applicable
Entity Type	Used to indicate the entity type for which the payment agreement request is created. The valid values are: • Account • Person	No
Third Party Payor	Used to indicate the external party who is responsible for paying the amount on behalf of the payor account. **Note:** The **Third Party Payor** list is enabled only when the option corresponding to the **Third Party Payor** list is selected. By default, the **Third Party Payor** list is disabled.	Yes (Conditional) **Note:** This field is required when you specify a value for the **Auto pay ID** field in the **Payment Schedule** section.
Payor Account ID	Displays the third party payor's account ID. **Note:** By default, this field is disabled. On clicking the option corresponding to the **Third Party Payor** list, the payor account ID is set to blank. On specifying the respective third party payor, the payor account ID of third party payor appears in the **Payor Account ID** field.	Not applicable
Pay Method	Used to indicate the method using which the payment is made. **Note:** The valid values differ with respect to the description added for respective pay method in the **Pay Method** screen.	Yes
Comments	Used to specify additional details about the payment agreement request.	No
Total Unpaid Amount	Displays the sum of unpaid amount of the bills.	Not applicable
Total Future Schedule Amount	Displays the sum of future schedule amount.	Not applicable

4. Add or modify the details of the payment agreement request, if required.
5. Define, edit, or remove characteristics of the payment agreement request, if required.
6. Define or remove a bill from the payment agreement request, if required.
7. Click **Save**.
   The changes made to the payment agreement request are saved.

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Note: You cannot edit a payment agreement request if the current date is later than the date derived by adding the latest schedule date to the grace days specified in the **Pay Method** screen.

Related Topics

For more information on...	See...
Payment Agreement Request screen	Payment Agreement Request (Used for Searching) on page 2242
How to search for a payment agreement request	Searching for a Payment Agreement Request on page 2247
Payment Agreement Request screen	Payment Agreement Request (Used for Viewing) on page 2253
Payment Agreement Request zone	Payment Agreement Request on page 2253
How to add an additional overdue bill in a payment agreement request	Adding an Additional Overdue Bill of an Account in a Payment Agreement Request on page 2262
How to define a payment schedule for a payment agreement request	Defining a Payment Schedule for a Payment Agreement Request on page 2250
How to define a characteristic for a payment agreement request	Defining a Characteristic for a Payment Agreement Request on page 2249

Deleting a Payment Agreement Request

Procedure

To delete a payment agreement request:

1. Search for the payment agreement request in the **Payment Agreement Request** screen.
2. In the **Search Results** section, click the link in the **Payment Agreement Request Information** column corresponding to the payment agreement request that you want to delete.
   The **Payment Agreement Request** screen appears.
3. Ensure that **Main** tab is selected.
4. Click the **Delete** button in the **Payment Agreement Request** zone.
   A message appears confirming whether you want to delete the payment agreement request.

Note: The **Delete** button appears when the payment agreement request is in the **Draft** status.

5. Click **OK**.
   The payment agreement request is deleted.

Related Topics

For more information on...	See...
How to search for a payment agreement request	Searching for a Payment Agreement Request on page 2247
Payment Agreement Request screen	Payment Agreement Request (Used for Viewing) on page 2253

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For more information on...	See...
Payment Agreement Request zone	Payment Agreement Request on page 2253

Adding an Additional Overdue Bill of an Account in a Payment Agreement Request

Procedure

To add an additional overdue bill of an account in a payment agreement request:

1. Ensure that the **Bill Details** section is expanded when you are editing a payment agreement request which is in the **Active** status.

   The **Bill Details** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Bill ID	Used to indicate the bill which is added in the payment agreement request. **Note:** The **Search** (🔍) icon appears corresponding to the **Bill ID** field. On clicking the **Search** icon, the **Bill Search** window appears. On specifying the value for a bill, the description of the bill appears corresponding to the **Bill ID** field. You cannot add a bill in the payment agreement request which does not belong to the respective account.	Yes

2. If you want to define more than one bill for the payment agreement request, click the **Add** (+) icon *a*nd then repeat step 2.

Note: However, if you want to remove a bill from the payment agreement request, click the **Delete** (🗑) icon corresponding to the bill.

Related Topics

For more information on...	See...
How to edit a payment agreement request	Editing a Payment Agreement Request on page 2259

Submitting a Payment Agreement Request

Prerequisites

To submit a payment agreement request, you should have:

- At least one overdue bill added to the payment agreement request which is in the **Complete** status.
- Payment schedule defined for the payment agreement request.

Procedure

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To submit a payment agreement request:

1. Search for the payment agreement request in the **Payment Agreement Request** screen.
2. In the **Search Results** section, click the link in the **Payment Agreement Request Information** column corresponding to the payment agreement request that you want to submit.
   The **Payment Agreement Request** screen appears.
3. Ensure that the **Main** tab is selected.
4. Click the **Submit** button in the **Payment Agreement Request** zone.
   The system behaves in the following manner:

If...	Then
The **Approval Required** check box is selected in the respective payment agreement request type.	The status of the payment agreement request is changed to **Approval In Progress**. A To Do is created using the To Do type (i.e. **C1-PAREQ**) specified in the **Approval To Do Type** field of the respective payment agreement request and then assigned to the users with the role specified in the **Approval To Do Role** field of the respective payment agreement request. In addition, a log entry is created for the payment agreement request when the To Do is created for the approver.
The **Approval Required** check box is not selected in the respective payment agreement request type.	The status of the payment agreement request is changed to **Active**.

Note: The **Submit** button appears when the payment agreement request is in the **Draft** status.

Related Topics

For more information on...	See...
How to search for a payment agreement request	Searching for a Payment Agreement Request on page 2247
Payment Agreement Request screen	Payment Agreement Request (Used for Viewing) on page 2253
Payment Agreement Request zone	Payment Agreement Request on page 2253

Removing an Overdue Bill from a Payment Agreement Request

Prerequisites

To remove an overdue bill from a payment agreement request, you should have:

- At least one overdue bill added to the payment agreement request

Procedure

To remove an overdue bill from a payment agreement request:

1. Search for the payment agreement request in the **Payment Agreement Request** screen.
2. In the **Search Results** section, click the link in the **Payment Agreement Request Information** column corresponding to the payment agreement request whose details you want to view.
   The **Payment Agreement Request** screen appears.
3. Select the check box corresponding to the overdue bill that you want to delete in the **Bill Details** zone.

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> **Note:** You can also select multiple overdue bills at the same time. In addition, you can select the check box corresponding to the column header. This allows you to delete all the overdue bills listed in the respective page.

4. Click **Delete**.
   A message appears indicating that the selected overdue bill has been successfully removed from the payment agreement request. The removed overdue bill appears in the **Search Bills** zone of the **Bills** tab.
5. Click **OK**.
   The **Delete** button appears when the payment agreement request is in the **Draft** status.

Related Topics

For more information on...	See...
How to search for a payment agreement request	Searching for a Payment Agreement Request on page 2247
How to create a payment agreement request	Creating a Payment Agreement Request on page 2247
Bill Details zone	Bill Details on page 2256
Search Bills zone	Search Bills on page 2257

Approving a Payment Agreement Request

You can view the number of payment agreement requests which are pending for approval in the **Payment Agreement Request** screen. The approver can review, and accordingly approve or reject the payment agreement request based on the observations.

> **Note:** The system will not allow you to approve or reject a payment agreement request submitted by you.

Procedure

To approve a payment agreement request:

1. Do either of the following:

If you want to...	Then...
Approve a payment agreement request through the Payment Agreement Request screen	**a.** Search for the payment agreement request in the **Payment Agreement Request** screen. **b.** In the **Search Results** section, click the link in the **Payment Agreement Request Information** column corresponding to the payment agreement request which you want to review.
Approve a payment agreement request from the To Do List screen	**a.** Click the **Menu** link in the **Application** toolbar. A list appears. **b.** From the **Main** menu, select **To Do** and then click **To Do List**. The **To Do List** screen appears. **c.** In the **To Do List** screen, click the **Search** (🔍) icon corresponding to the **To Do Type** field. On clicking the **Search** icon, the **To Do Type for User Search** window appears. **d.** Enter the **C1-PAREQ** in the **To Do Type** field. **e.** Click the **Search** button corresponding to the **To Do Type** field. The **To Do List** screen appears.

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If you want to...	Then...
	f. Select the **Open** option from the **Filter by** list to view all unassigned To Dos. **g.** Click the link in the **Message** column corresponding to the To Do of the payment agreement request that you want to review.

The **Payment Agreement Request** screen appears.

2. Review the payment agreement request details.
3. Click the **Approve** button in the **Payment Agreement Request** zone.
The status of the payment agreement request is changed to **Active**.

Note:

The **Approve** button appears when:

- The payment agreement request is in the **Approval In Progress** status.
- A user with the approval To Do role is reviewing the payment agreement request.

You cannot approve a payment agreement request for a delinquency process when the delinquency process is either in the **Canceled**, **Completed**, or **Terminated** status.

Related Topics

For more information on...	See...
Payment Agreement Request screen	Payment Agreement Request (Used for Searching) on page 2242
How to search for a payment agreement request	Searching for a Payment Agreement Request on page 2247
Payment Agreement Request screen	Payment Agreement Request (Used for Viewing) on page 2253
Payment Agreement Request zone	Payment Agreement Request on page 2253

Rejecting a Payment Agreement Request

Prerequisites

To reject a payment agreement request, you should have:

- Rejection reasons defined in the application

Note:

While rejecting a payment agreement request, you need to specify the reason why you want to reject the payment agreement request. You can select the appropriate rejection reason when you have defined the reasons for the **Rejected** status of the **C1-PaymentAgreementRequest** business object in the **Status Reason** screen.

The system will not allow you to approve or reject a payment agreement request submitted by you.

Procedure

To reject a payment agreement request:

1. Do either of the following:

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If you want to	Then
Reject a payment agreement request through the Payment Agreement Request screen	**a.** Search for the payment agreement request in the **Payment Agreement Request** screen. **b.** In the **Search Results** section, click the link in the **Payment Agreement Request Information** column corresponding to the payment request which you want to review.
Reject a payment agreement request from the To Do List screen	**a.** Click the **Menu** link in the **Application** toolbar. A list appears. **b.** From the **Main** menu, select **To Do** and then click **To Do List**. The **To Do List** screen appears. **c.** In the **To Do List** screen, click the **Search** (🔍) icon corresponding to the **To Do Type** field. On clicking the **Search** icon, the **To Do Type for User Search** window appears. **d.** Enter the **C1-PAREQ** in the **To Do Type** field. **e.** Click the **Search** button corresponding to the **To Do Type** field. The **To Do List** screen appears. **f.** Select the **Open** option from the **Filter by** list to view all unassigned To Dos. **g.** Click the link in the **Message** column corresponding to the To Do of the payment agreement request that you want to review.

The **Payment Agreement Request** screen appears.

2. Review the payment agreement request details.
3. Click the **Reject** button in the **Payment Agreement Request** zone.

   The **Reject Payment Agreement Request** window appears. It contains following fields:

Field Name	Field Description	Mandatory (Yes or No)
Status Reason	Used to indicate the reason why you want to reject the payment agreement request. **Note:** If you are rejecting the payment agreement request, this list includes only those reasons which are defined for the **Rejected** status of the **C1-PaymentAgreementRequest** business object through the **Status Reason** screen.	Yes
Comments	Used to specify additional information while rejecting the payment agreement request.	No

Note: The **Reject** button appears when:

- The payment agreement request is in the **Approval In Progress** status.
- A user with the approval To Do role is reviewing the payment agreement request.

4. Select the rejection reason from the **Status Reason** list.
5. Click **Save**.
   The status of the payment agreement request is changed to **Rejected**.

Related Topics

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For more information on...	See...
Payment Agreement Request screen	Payment Agreement Request (Used for Searching) on page 2242
How to search for a payment agreement request	Searching for a Payment Agreement Request on page 2247
Payment Agreement Request screen	Payment Agreement Request (Used for Viewing) on page 2253
Payment Agreement Request zone	Payment Agreement Request on page 2253

Resubmitting a Payment Agreement Request

Prerequisites

To resubmit a payment agreement request, you should have:

- At least one overdue bill added to the payment agreement request
- Payment schedule defined for the payment agreement request

Procedure

To resubmit a payment agreement request:

1. Search for the payment agreement request in the **Payment Agreement Request** screen.
2. In the **Search Results** section, click the link in the **Payment Agreement Request Information** column corresponding to the payment agreement request that you want to resubmit.
   The **Payment Agreement Request** screen appears.
3. Click the **Resubmit** button in the **Payment Agreement Request** zone.

   The **Resubmit Payment Agreement Request** window appears. It contains the following field:

Field Name	Field Description	Mandatory (Yes or No)
Comments	Used to specify the changes that the submitter should make in the payment agreement request before resubmitting the payment agreement request for approval. **Note:** You can resize the text box depending on your requirement by clicking the **Resize Handle** (⇲) icon at the bottom right corner of the text box.	Yes

Note: The **Re Submit** button appears when the following conditions are met:

- The payment agreement request is in the **Approval In Progress** status.
- A user with the approval To Do role is reviewing the payment agreement request.

4. Enter the comments in the respective field.
5. Click **Save**.
   The status of the payment agreement request is changed to **Draft**. A To Do is created of the To Do type (i.e. **C1-PAREQ**) specified in the **Submitter To Do Type** field of the respective payment agreement request type and then assigned to the users with the role specified in the **Submitter To Do Role** field of the respective payment agreement request type. In addition, a log entry is created for the payment agreement request when the To Do is created for the submitter.

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> **Note:** The To Do is created for the submitter only when the submitter To Do type and submitter To Do role are specified in the respective payment agreement request type.

Related Topics

For more information on...	See...
How to search for a payment agreement request	Searching for a Payment Agreement Request on page 2247
Payment Agreement Request screen	Payment Agreement Request (Used for Viewing) on page 2253
Payment Agreement Request zone	Payment Agreement Request on page 2253
How to submit a payment agreement request	Submitting a Payment Agreement Request on page 2262

Activating a Payment Agreement Request

Prerequisites

To activate a payment agreement request, you should have:

- At least one overdue bill added to the payment agreement request.
- Payment schedule defined for the payment agreement request.

Procedure

To activate a payment agreement request:

1. Search for the payment agreement request in the **Payment Agreement Request** screen.

> **Note:** The payment agreement request must be in the **Broken Promise** status.

2. In the **Search Results** section, click the link in the **Payment Agreement Request Information** column corresponding to the payment agreement request that you want to activate.
   The **Payment Agreement Request** screen appears.
3. Click the **Activate** button in the **Payment Agreement Request** zone.
   The status of the payment agreement request is changed to **Active**.

Related Topics

For more information on...	See...
Payment Agreement Request screen	Payment Agreement Request (Used for Searching) on page 2242
How to search for a payment agreement request	Searching for a Payment Agreement Request on page 2247
Payment Agreement Request screen	Payment Agreement Request (Used for Viewing) on page 2253
Payment Agreement Request zone	Payment Agreement Request on page 2253

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Filtering an Overdue Bill of an Account

Prerequisites

To filter an overdue bill of an account, you should have:

- Overdue bill available for the respective account.

Procedure

To filter an overdue bill of an account:

1. Search for the payment agreement request in the **Payment Agreement Request** screen.

   Note: The payment request must be in the **Draft** status.

2. In the **Search Results** section, click the link in the **Payment Agreement Request Information** column corresponding to the payment request which you want to review.
   The **Payment Agreement Request** screen appears.
3. Ensure that the **Bills** tab is selected.
   The **Search Bills** zone appears.

   Note: If there is any overdue bill existing for an account, then that bill appears in the **Search Results** section of the **Search Bills** zone.

4. Click the **Expand Filter** button to view the filter area.

   Note: You can filter the list using the **Bill ID**, **Bill Date From**, and **Bill Date To** field available in the **Filter** area. By default, the **Filter** area is hidden. You can view the **Filter** area by clicking the **Filters** (▽) icon in the upper right corner of this zone.

5. Enter the search criteria in the **Search Bills** zone.

   Note: ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.

6. Click **Search**.
   A filtered list of overdue bills that meet the search criteria appear in the **Search Results** section.

   Note:

Related Topics

For more information on...	**See...**
How to search for a payment agreement request	Searching for a Payment Agreement Request on page 2247
Payment Agreement Request screen	Payment Agreement Request (Used for Searching) on page 2242
Payment Agreement Request screen	Payment Agreement Request (Used for Viewing) on page 2253
Bills tab	Payment Agreement Request - Bills on page 2257
Search Bills zone	Search Bills on page 2257

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Adding an Overdue Bill in a Payment Agreement Request

Prerequisites

To add an overdue bill in a payment agreement request, you should have:

- Overdue bills that are in the **Complete** status for an account where the outstanding amount is greater than zero.

Procedure

To add an overdue bill in a payment agreement request:

1. Search for the payment agreement request in the **Payment Agreement Request** screen.

   Note: The payment request must be in the **Draft** status.

2. In the **Search Results** section, click the link in the **Payment Agreement Request Information** column corresponding to the payment agreement request whose details you want to view.
   The **Payment Agreement Request** screen appears.
3. Ensure that the **Bills** tab is selected.
   The **Search Bills** zone appears.

   Note: If an overdue bill for an account is already listed in the **Search Results** section, you can directly proceed to step 6, else you can resume from step 4.

4. Click the **Expand Filter** button and enter the search criteria in the **Search Bills** zone.

   Note: ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.

5. Click **Search**.
   A list of overdue bills that meet the search criteria appears in the **Search Results** section.
6. In the **Search Bills** zone, select the check box corresponding to the overdue bill that you want to add in a payment agreement request.

   Note: You can add more than one overdue bill to the payment agreement request at the same time.

7. Click the **Add** button in the **Search Bills** zone.
   A message appears indicating that selected bills have been successfully added to the payment agreement request.
8. Click **OK**.
   The respective overdue bill appears in the **Bill Details** section of the **Payment Agreement Request** zone.

   Note:

   You cannot add a bill in the payment agreement request if its outstanding balance is less than or equal to zero.

   You cannot add a bill to the payment agreement request when the bill is a part of another payment agreement request and is not in the **Complete** status.

Related Topics

For more information on...	See...
Payment Agreement Request screen	Payment Agreement Request (Used for Searching) on page 2242

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For more information on...	See...
How to search for a payment agreement request	Searching for a Payment Agreement Request on page 2247
Payment Agreement Request screen	Payment Agreement Request (Used for Viewing) on page 2253
Bills tab	Payment Agreement Request - Bills on page 2257
Search Bills zone	Search Bills on page 2257
Bill Details zone	Bill Details on page 2256

Viewing the Log of a Payment Agreement Request

Procedure

To view the log of a payment agreement request:

1. Search for the payment agreement request in the **Payment Agreement Request** screen.
2. In the **Search Results** section, click the link in the **Payment Agreement Request Information** column corresponding to the payment agreement request whose log you want to view.
   The **Payment Agreement Request** screen appears.
3. Click the **Log** tab.
   The **Log** tab appears
4. View the complete trail of actions performed on the payment agreement request in the **Payment Agreement Request Log** zone.

Related Topics

For more information on...	See...
How to search for a payment agreement request	Searching for a Payment Agreement Request on page 2247
Payment Agreement Request screen	Payment Agreement Request (Used for Viewing) on page 2253
Payment Agreement Request Log zone	Payment Agreement Request Log on page 2258
How to add a log entry for a payment agreement request	Adding a Log Entry for a Payment Agreement Request on page 2271

Adding a Log Entry for a Payment Agreement Request

Procedure

To add a log entry for a payment agreement request:

1. Search for the payment agreement request in the **Payment Agreement Request** screen.
2. In the **Search Results** section, click the link in the **Payment Agreement Request Information** column corresponding to the payment agreement request whose log you want to edit.
   The **Payment Agreement Request** screen appears.
3. Click the **Log** tab.
   The **Log** tab appears.

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4. Click the **Add Log Entry** link in the upper right corner of the **Payment Agreement Request Log** zone.

   The **Add Payment Agreement Request Log** window appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Payment Agreement Request Information	Displays information about the payment agreement request.	Not applicable
Log Details	Used to specify additional comments for the payment agreement request. **Note:** You can resize the text box depending on your requirement by clicking the **Resize Handle** (⇲) icon at the bottom right corner of the text box.	Yes

5. Enter the comments in the **Log Details** field.
6. Click **Save**.
   The log entry is added in the **Payment Agreement Request Log** zone.

Related Topics

For more information on...	See...
How to search for a payment agreement request	Searching for a Payment Agreement Request on page 2247
Payment Agreement Request screen	Payment Agreement Request (Used for Viewing) on page 2253
Payment Agreement Request zone	Payment Agreement Request on page 2253

Chapter 32

Inbound Message

Topics:

- Health Care Inbound Message
- Health Product and Plan Inbound Message
- Inbound Message Type
- Inbound Message (Used for Searching)
- Inbound Message (Used for Viewing)
- Statement Construct Preference
- Hold Request Preference

Oracle Revenue Management and Billing enables you to create the following inbound messages through the respective inbound web services:

Inbound Message	Inbound Web Service
Health Care Inbound Message on page 2274	C1-HCInboundMessage on page 2683

Once an inbound message is created, you can submit the inbound message for validation and processing from the user interface or through a batch process. The following table lists the batches which validate and process the respective inbound message at regular intervals:

Inbound Message	Batch Control Name
Health Care Inbound Message	Health Care Inbound Message Periodic Monitor (C1-HCINB)

For more information about the batches, refer to *Oracle Revenue Management and Billing Batch Guide*.

Health Care Inbound Message

On calling the **C1-HCInboundMessage** web service, you can create a health care inbound message using a health care inbound message type. You can create a health care inbound message type using the **Health Care Inbound Message Type (C1-HCInboundMsgType)** business object. The health care inbound message type helps the system to determine:

- **Inbound Message Business Object** - The business object using which the health care inbound message should be created in the system. You must specify the **Health Care Inbound Message (C1-HCInboundMessage)** business object in the health care inbound message type.
- **Customer Registration Type** - The health care inbound message creates the person, account, policy, and policy plan through a customer registration object. The system creates the customer registration object using the customer registration type specified in the health care inbound message type. The customer registration type helps the system to determine:
  - **Customer Registration Business Object** - The business object using which the customer registration object should be created in the system. You must specify the **Customer Registration - Health Care (C1-CustomerRegistrationHC)** business object in the customer registration type.
  - **Person Business Object** - The business object using which the person should be created in the system. You must specify the **Person BO (C1_PERSON_BO)** business object in the customer registration type.
  - **Account Business Object** - The business object using which the account should be created in the system. You must specify the **Account BO (C1-AccountBO)** business object in the customer registration type.
  - **Policy Plan Business Object** - The business object using which the policy plan should be created in the system. You must specify the **Policy Plan (C1-PolicyPlan)** business object in the customer registration type.
  - **Membership Business Object** - The business object using which the membership should be created in the system. You must specify the **Membership (C1-Membership)** business object in the customer registration type.
  - **Address Business Object** - The business object using which the effective dated address should be created in the system. You must specify the **Address (C1-Address)** business object in the customer registration type.

  While creating a health care inbound message type for the fully-insured group health insurance business, you must use a customer registration type where the **Approval Required**, **Final Approval Required**, and **Manual Billing Hierarchy and Pricing** options are not selected. However, while creating a health care inbound message type for the self-funded health insurance business, you must use a customer registration type where the **Final Approval Required** and **Manual Billing Hierarchy and Pricing** options are selected, but the **Approval Required** option is not selected.

The following table lists the various activities that you can perform for the respective combination through the **C1-HCInboundMessage** web service:

Person Type	Policy Category	Enables you to:
Parent Customer	Self-Funded	• Create or edit a parent customer • Create or edit a bill group of the parent customer • Create the derivation and pricing parameters for the bill group • Create or edit the accounts of a bill group • Create or edit the policies of a bill group
	Fully-Insured Group	• Create or edit a parent customer • Create or edit a bill group of the parent customer • Create the derivation and pricing parameters for the bill group • Create or edit the accounts of the parent customer and bill group • Create or edit the policies of the parent customer and bill group

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Person Type	Policy Category	Enables you to:
		• Create or edit the plans of the policies • Associate one or more pricing rule types with a policy plan • Create or edit the pricing rules of the policy plans • Terminate, reinstate, or renew policies of the parent customer and bill group
Bill Group	Self-Funded	• Create or edit a bill group • Create the derivation and pricing parameters for the bill group • Create or edit the accounts of the bill group • Create or edit the policies of the bill group
	Fully-Insured Group	• Create or edit a bill group • Create the derivation and pricing parameters for the bill group • Create or edit the accounts of the bill group • Create or edit the policies of the bill group • Create or edit the plans of the policies • Associate one or more pricing rule types with a policy plan • Create or edit the pricing rules of the policy plans • Terminate, reinstate, or renew policies of the bill group
Any Other Person Type	-	• Create or edit a person • Credit or edit the accounts of the person • Create or edit the memberships of the policy plans • Add or remove members from a membership • Create or edit the one-time or recurring pass-through billable charges for a membership • Create or edit the benefits charges for a membership

The following table describes how the system behaves when the respective entity information is given in a health care inbound message:

Entity	System Behavior
Person	The system uses the **C1-PERSTYPE** feature configuration to decide whether the person type specified in the health care inbound message represents **Parent Customer** or **Bill Group**. If the person type specified in the health care inbound message matches the person type specified in the **Bill Group Person Type** or **Parent Person Type** option type of the **C1-PERSTYPE** feature configuration, the system creates or updates the person, account, policy, policy plan, and address through a customer registration object. Note that the memberships, pass-through billable charges, and pricing rules are created directly and not via customer registration object. However, if the person type specified in the health care inbound message does not match the person type specified in the **Bill Group Person Type** or **Parent Person Type** option type, the system creates or updates the person and its other entities directly and not through a customer registration object. In this case, the system only refers the customer registration type for the business objects using which the person, account, policy plan, membership, and address should be created or updated in the system.

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Entity	System Behavior
	If the related person information is given for a bill group and the person type of the related person is **Parent Customer**, then the bill group is related to the parent customer using the person relationship type which is specified in the **Person Relationship Type** option type of the **C1-ASOBLLNG** feature configuration. If the derivation and pricing parameters are specified for a bill group, the system automatically creates one sort record for the bill group. Here, the sort ID is set to the bill group ID. The start and end dates of the sort record are set to the bill group and parent customer's relationship start and end dates. Once the sort record is created, the system creates the derivation and pricing parameters for the bill group and sort ID combination.
	Note: The system supports the **Add** and **Update** operations for all entities except the derivation and pricing parameters for the bill group. Through the health care inbound message, each time, the system creates a new derivation and pricing parameters record for the bill group and does not update the existing derivation and pricing parameters record of the bill group.
Account	While creating an account, the system defines the **Invoice Type** characteristic for the account. It stores the account type given in the account information in the characteristic type which is specified in the **Invoice Type Characteristic Type** option type of the **C1-ASOBLLNG** feature configuration.
Policy	If the fully-insured group policy information is given for a bill group, the system does the following: • Associates the bill group with the policy using the policy person role which is specified in the **Bill Group Policy Person Role** option type of the **C1-ASOBLLNG** feature configuration • Associates the parent customer with the policy using the policy person role which is specified in the **Parent Customer Policy Person Role** option type of the **C1-ASOBLLNG** feature configuration However, if the fully-insured group policy information is given for a parent customer, the system does the following: • Associates the parent customer with the policy using the policy person role which is specified in the **Parent Customer Policy Person Role** option type of the **C1-ASOBLLNG** feature configuration If the self-funded policy information is given for a bill group, the system does the following: • Associates the bill group with the policy using the policy person role which is specified in the **Bill Group Policy Person Role** option type of the **C1-ASOBLLNG** feature configuration • Associates the parent customer with the policy using the policy person role which is specified in the **Parent Customer Policy Person Role** option type of the **C1-ASOBLLNG** feature configuration On renewing a fully-insured group policy, the system removes the end date from the policy and stamps the renewal date against the policy.
	Note: You can renew a policy where the policy category is set to **Self-Funded** from the user interface and not through a health care inbound message. However, you can renew a policy where the policy category is set to **Fully-Insured Group** through a health care inbound message and not from the user interface.

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Entity	System Behavior
	On terminating a fully-insured group policy, the system updates the end date of the following entities with the termination date: • Policy • Policy Person • Policy Plan • Membership • Membership Person • Pricing Rule However, before updating the end dates, the system stores the original end date in the **ORG_END_DT** column of the respective table for all the above entities. The status of the policy is changed to the status which is specified in the **Policy Termination Status** option type of the **C1-ASOBLLNG** feature configuration. On reinstating a fully-insured group policy, the system updates the end date of the above entities with the original end date. In addition, the status of the policy is changed to the status which is specified in the **Policy Reinstatement Status** option type of the **C1-ASOBLLNG** feature configuration.
	Note: The **Policy** entity is applicable only for **Self-Funded Group Health Insurance** and **Fully-Insured Group Health Insurance** businesses.
Policy Plan	While creating a policy plan, the system requires either the price item or at least one pricing rule type. The system allows you to associate only those pricing rule types where the category is set to **Age Based**, **Tier Based**, or **Pass-Through Billable Charge**.
	Note: The **Policy Plan** entity is applicable only for **Self-Funded Group Health Insurance** and **Fully-Insured Group Health Insurance** businesses.
Pricing Rule Type	The system does not allow you to create or update a pricing rule type through a health care inbound message.
	Note: The **Pricing Rule Type** entity is applicable for **Self-Funded Group Health Insurance**, **Fully-Insured Group Health Insurance** and **Individual Health Insurance** businesses.
Pricing Rule	The system allows you to define and edit the age-based and tier-based pricing rules of the policy plan. Note that the system supports the **Replace** operation and not the **Update** operation when you are editing these pricing rules through a health care inbound message.

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Entity	System Behavior
	Note: You can define and edit the age-based and tier-based pricing rules through a health care inbound message and not from the user interface. You can create the following pricing rules from the user interface and not through a health care inbound message: • Claim • Specific Stop-Loss • Aggregate Stop-Loss • Retention Type Claim Based • Retention Type Enrollment Based • One-Time Flat Fees • Recurring Flat Fees • Ancillary • Discount Arrangement • Level Funded
	Note: The **Pricing Rule** entity is applicable for **Self-Funded Group Health Insurance**, **Fully-Insured Group Health Insurance**, and **Individual Health Insurance** businesses.
Pass-Through Billable Charge	If the price item, account identifier type, and account identifier are given in the billable charge information, the system directly creates an SQI based billable charge when you process the health care inbound message. But, if only the price item is given in the billable charge information, the system checks whether the price item is included in any pricing rule type where the pricing rule type category is set to **Pass-Through Billable Charge**. If so, the system checks whether the pass-through billable charge pricing rule type is associated with the policy plan to which the membership belongs (for which the billable charge information is received). If so, the system creates an SQI based billable charge using the respective pass-through billable charge pricing rule type.
	Note: The **Pass-Through Billable Charge** entity is applicable only for **Fully-Insured Group Health Insurance** and **Individual Health Insurance** business.

The following table recommends the sequence in which the respective entities should be created for the different line of business through a separate healthcare inbound message.

Line of Business	Sequence	Entity
Fully-Insured Group Health Insurance	1	Parent Customer (along with policy details)
	2	Bill Groups (along with policy details)
	3	Pricing Rules
	4	Member Persons (along with policy details)
Individual Health Insurance	1	Member Person (along with health product, health plan, and pricing rule details)
Self-Funded Group Health Insurance	1	Parent Customer (along with policy details)
	2	Bill Groups (along with policy details)

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Line of Business	Sequence	Entity
	3	Pricing Rules
	4	Member Persons (along with policy details)

The following table lists the details which you need to provide either in full or partial while editing the entity information through a health care inbound message.

Entity	Information	Tag Name	In case of edit, you need to provide details in...
Person	Person Name	<personName>	All the tags within the <personName> tag
	Identifiers	<identifiers>	All the tags within the <identifiers> tag
	Address	<address>	The following tags within the <address> tag: • <addressEffDate> • <addressType>
	Phones	<phones>	All the tags within the <phones> tag
	Related Persons	<relatedPersons>	All the tags within the <relatedPersons> tag
	Characteristics	<characteristics>	The following tags within the <characteristics> tag: • <characteristicType> • <effectiveDate>
	Bill Level Parameters	<billLevelParameters>	The following tag within the <billLevelParameters> tag: • <sequence>
Account	Identifiers	<identifiers>	All the tags within the <identifiers> tag
	Account Person	<accountPerson>	All the tags within the <accountPerson> tag
	Account Autopay	<autoPayDetails>	All the tags within the <autoPayDetails> tag
	Characteristics	<characteristics>	The following tags within the <characteristics> tag: • <characteristicType • <effectiveDate>
Policy	Policy Person	<policyPersons>	All the tags within the <policyPersons> tag
	Characteristics	<characteristics>	The following tags within the <characteristics> tag: • <characteristicType • <effectiveDate>
	Plan	<pricingRuleTypeList>	All the tags with the <pricingRuleTypeList> tag.

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Entity	Information	Tag Name	In case of edit, you need to provide details in...
	Characteristics	<characteristics>	The following tags within the <characteristics> tag: • <characteristicType> • <effectiveDate>
	Pricing Rule	<pricingRuleData>	All the tags within the <pricingRuleData> tag.
Membership	Membership Person	<memberData>	The following tags within the <memberData> tag:: • <sequence> • <membershipIdentifierType> • <policyNumber> • <sourceSystem> • <planNumber> • <healthPlanCode>
	Characteristics	<characteristics>	The following tags within the <characteristics> tag: • <characteristicType> • <effectiveDate>
	Membership Person Characteristics	<membershipPersonCharacteristic>	The following tags within the <membershipPersonCharacteristic> tag: • <characteristicType> • <effectiveDate>

The following table lists the details which you need to provide while carrying out a specific action for an entity through a health care inbound message.

Entity	Action	You need to provide the details in the following tags...
Fully-Insured Group Policy	Policy Renewal	<policyData> <policyType></policyType> <policyNumber></policyNumber> <sourceSystem></sourceSystem> <renewalDate></renewalDate> <endDate></endDate> </policyData>
	Policy Reinstatement	<policyData> <policyNumber></policyNumber> <sourceSystem></sourceSystem> <reinstateInformation> <reinstatementDate></ reinstatementDate> <reinstateReason></reinstateReason> </reinstateInformation>

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Entity	Action	You need to provide the details in the following tags...
		</policyData>
	Policy Termination	<policyData> <policyNumber></policyNumber> <sourceSystem></sourceSystem> <terminationInformation> <terminateDate></terminateDate> <terminationReason></terminationReason> </terminationInformation> <policyData>
Individual Membership	Manual Renewal (only renews the membership)	<memberData> <sequence></sequence> <startDate></startDate> <endDate></endDate> <autoRenew></autoRenew> <membershipRenewalDate></membershipRenewalDate> <membershipPersonStatus></membershipPersonStatus> <membershipPersonstatusReason></membershipPersonstatusReason> </memberData>
	Manual Renewal (of a dependent person)	<memberData> <sequence></sequence> <endDate></endDate> <membershipPersonStatus></membershipPersonStatus> <membershipPersonstatusReason></membershipPersonstatusReason> </memberData>
	Termination	<memberData> <sequence></sequence> <endDate></endDate> <membershipPersonStatus></membershipPersonStatus> <membershipPersonstatusReason></membershipPersonstatusReason> </memberData>

On calling the **C1-HCInboundMessage** web service, a health care inbound message is created in the **Pending** status. When the **Health Care Inbound Message Periodic Monitor (C1-HCINB)** batch is executed, the system checks whether there are any health care inbound messages in the **Pending** status. If there is a health care inbound message in the **Pending** status, the system validates the inbound message. If the health care inbound message is successfully validated, it is processed further and the entities are either created or updated in the system based on the available information.

Alternatively, the system enables you to submit the health care inbound messages for validation and processing from the user interface. On submitting a health care inbound message, the system validates the health care inbound message. If a health care inbound message is successfully validated, it is processed further and the required entities are created or updated in the system based on the available information.

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If the person type is **Parent Customer**, the customer registration object is created in the **Complete** status. However, if the person type is **Bill Group**, the customer registration object is created in the **Bill Group Approved** status. The policies are created in the **In Force/Active** status and the pricing rules are created in the **Active** status. Finally, the status of the health care inbound message is changed to **Processed**.

Note: The above status transition is mentioned for a customer registration object based on the assumption that the data sent through the health care inbound message will be pre-approved and does not require any approval in the system.

If any error occurs while validating or processing a health care inbound message, the status of the health care inbound message is changed to **Rejected**. The system enables you to either reprocess or void a rejected health care inbound message. The system can reprocess a health care inbound message when its status is changed to **Pending**. Using the **Retry** option, you can change the status of the health care inbound message from **Rejected** to **Pending**. The **Health Care Inbound Message Periodic Monitor (C1-HCINB)** batch will then reconsider and reprocess the health care inbound message.

You can also configure the system such that the batch can automatically retry to process the rejected health care inbound messages. However, it will attempt to retry when the **Maximum Retry** parameter in the **Retry for To Dos (C1-TODORETRY)** algorithm is set to a value greater than zero. Also, the maximum number of times the batch can attempt to retry and reprocess a health care inbound message depends on the value defined in the **Maximum Retry** parameter.

At present, if a customer registration object is created through a health care inbound message, you cannot edit the customer registration object from the user interface. You can only edit such customer registration objects through a health care inbound message.

Related Topics

For more information on...	See...
How to setup the **C1-ASOBLLNG** feature configuration	Setting the C1-ASOBLLNG Feature Configuration on page 4417
How to setup the **C1-PERSTYPE** feature configuration	Setting the C1_PERSTYPE Feature Configuration on page 4460

Prerequisites

To use the health care inbound message feature, you need to do the following:

- Define the required customer registration types in the system.

  Note: The health care inbound message creates the person, account, policy, and policy plan through a customer registration object. The system creates the customer registration object using the customer registration type specified in the health care inbound message type. While creating a health care inbound message type for the fully-insured group health insurance business, you must use a customer registration type where the **Approval Required**, **Final Approval Required**, and **Manual Billing Hierarchy and Pricing** options are not selected. However, while creating a health care inbound message type for the self-funded health insurance business, you must use a customer registration type where the **Final Approval Required** and **Manual Billing Hierarchy and Pricing** options are selected, but the **Approval Required** option is not selected.
- Define the required health care inbound message types in the system.
- Define the required characteristic types where the characteristic entity is set to **Inbound Message Type**.
- Define the required characteristic types where the characteristic entity is set to **Inbound Message**.
- Define the values for the required parameters in the **C1-HCINVAL**, **C1-HCINPROC**, **C1-TODORETRY**, and **C1-TDCRINMSG** algorithms.
- Define the values for the **C1-SourceSystemLookup** and **C1-ExtLookRetTypeRateOpt** extendable lookups.
- Define the values for the **HOUSE_TYPE**, **PER_OR_BUS_FLG**, **NAME_TYPE_FLG**, **ADDRESS_TYPE_FLG**, **BILL_ADDR_SRCE_FLG**, **BILL_FORMAT_FLG**, and **RUNOUT_ADM_OPT_FLG** lookup fields.

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- Set the values for the following option types in the **C1-ASOBLLNG** feature configuration:
  - Person Relationship Type
  - Bill Group Policy Person Role
  - Parent Customer Policy Person Role
  - Invoice Type Characteristic Type
  - Policy Termination Status
  - Policy Reinstatement Status
  - Default Rate Option - Flat
  - Default Rate Option - Percentage
  - Age Based Parameter
  - Membership Inactive Status
  - Member Person Inactive Status
- Set the values for the following option types in the **C1-PERSTYPE** feature configuration:
  - Bill Group Person Type
  - Parent Person Type
- Define the required person identifier types, account identifier types, person relationship types, characteristic types, phone types, customer classes, bill cycles, collection classes, divisions, bill route types, charge types, currencies, bill periods, invoice frequencies, distribution codes, auto pay route types, auto pay sources, account relationship types, policy types, policy person roles and contract relationship types in the application.
- Define the values for the **C1_INVOICE_DAY_BILL_PERIOD_FLG** lookup field.

  Note: Each lookup field value should be mapped to a valid bill period which exists in the system. You must then define this lookup field value as a predefined value for the **C1OFFRST** characteristic type. The system will then use the bill period configured for the respective invoice day when the **C1OFFRST** characteristic is defined for the account.
- Define the required predefined values for the **C1OFFRST** characteristic type.
- Set the batch control type of the **Health Care Inbound Message Periodic Monitor (C1-HCINB)** batch to **Timed** and define the following attributes:
  - Time Interval
  - Timer Active
  - User ID
  - Batch Language
  - Email Address
- Define the required status reasons for the status to which a policy must be transitioned on policy termination.
- Define the required status reasons for the status to which a policy must be transitioned on policy reinstatement.
- Define the bill cancel reasons which you want to use when the premium bill segment is canceled during the policy or membership termination.
- Define the required exchange rates in the system.
- Define the required access groups in the system.
- Attach a currency conversion algorithm to the **Currency Conversion For Bill Segments** algorithm spot of the required divisions.

Related Topics

For more information on...	See...
How to setup the **C1-ASOBLLNG** feature configuration	Setting the C1-ASOBLLNG Feature Configuration on page 4417
How to setup the **C1-PERSTYPE** feature configuration	Setting the C1_PERSTYPE Feature Configuration on page 4460

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Automatic Hold Request Creation Via Inbound Message

Oracle Revenue Management and Billing provides the ability to automatically create a hold request whenever the status of an inbound message is changed to **Rejected**. Note that an automatic hold request is created only when the **Create Automatic Hold Request** attribute of the hold request preference is set to **Yes**. The system considers the hold request preference which is specified in the **Hold Request Field Mapping** option type of the **C1-HOLDSRCH** feature configuration.

To enable the automatic hold request creation via inbound message feature, you need to attach an algorithm created using the **C1-HCINBHOLD** algorithm type to the **Enter** system event of the **Rejected** status in the **C1-InboundMessage** business object.

Once the status of an inbound message is changed to **Rejected**, the system automatically holds only the bill generation process of an account by creating a hold request. If an account is updated through an inbound message, the system creates a hold request with the entity level set to **Account** and includes the respective account in the hold request. If an existing person with one or more accounts is updated through an inbound message, the system creates a hold request with the entity level set to **Account** and includes all the existing accounts of the person in the hold request. Note that the automatic hold request creation via inbound message is not valid when a request to add a person or account is received through an inbound message.

While creating an automatic hold request, the system uses the following attributes of the hold request preference:

- Default Automatic Hold Reason
- Default Automatic End Date
- Default Automatic Hold Request Type Code

The system sets the hold request start date to the system date. The hold request is created in the **Active** status. The hold process in the hold request is set to **Bill Generation** and the hold process and hold entity start and end dates are set to the hold request start and end dates, respectively. The bill after date is set for the accounts on the **C1-HLMON** batch execution.

If the member data is received along with the person data in an inbound message, the system determines whether the person belongs to a group or individual membership. If the person belongs to an individual membership, the system determines the account to which the individual membership is billed using the **Account Identifier Type** and **Account Identifier Value** characteristics which are defined on the individual membership. While fetching the characteristics, the system considers the characteristic types which are specified in the **Account Identifier Type Char Type** and **Account Identifier Value Char Type** option types of the **C1-ASOBLLNG** feature configuration. However, if the person belongs to a group membership, the system determines the account to which the group membership is billed using the following attributes of the hold request preference:

- Characteristic Type for Bill Level 1
- Characteristic Type for Bill Level 2
- Characteristic Type for Bill Level 3
- Characteristic Type for Bill Level 4

Once the billing account is derived for the membership, the system creates an automatic hold request for the respective account.

Note:

You can manually release an automatic hold request from the user interface or through an inbound message.

The approval process for hold request is not supported in this feature. Therefore, we recommend you to use a hold request type where the **Activation Approval** option is not selected.

This feature is tested and certified for both the fully insured group and fully insured individual lines of business.

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Manual Hold Request Creation Via Inbound Message

Oracle Revenue Management and Billing provides the ability to create a hold request through an inbound message. A new set of tags are introduced in the health care inbound message schema. An inbound message enables you to hold only the bill generation process of an account by creating a hold request. You can provide the bill hold information either at the person or account level. If you provide the bill hold information at the account level, the system creates a hold request with the entity level set to **Account** and includes the respective account in the hold request. However, if you provide the bill hold information at the person level, the system creates a hold request with the entity level set to **Account** and includes all the accounts of the person in the hold request.

To create a hold request via an inbound message, you must set the **action** tag to **H** within the **billHold** tag. You can also send information, such as hold reason, start date, end date, and hold request type along with the **action** tag in the inbound message. If you send all these details in the inbound message, the system creates a hold request using the given information. However, if you do not send all these details in the inbound message, the system first derives the hold request preference from the **Hold Request Field Mapping** option type of the **C1-HOLDSRCH** feature configuration. Then, the system creates a hold request using the following attributes of the hold request preference:

- Default Manual Hold Reason
- Default Manual End Date
- Default Manual Hold Request Type Code

The system sets the hold request start date to the system date. The hold request is created in the **Active** status. The hold process in the hold request is set to **Bill Generation** and the hold process and hold entity start and end dates are set to the hold request start and end dates, respectively. The bill after date is set for the accounts on the **C1-HLMON** batch execution.

You can also release a hold request through an inbound message. To release a hold request via an inbound message, you must set the **action** tag to **R** within the **billHold** tag. You can also send information, such as hold reason, start date, end date, and hold request type along with the **action** tag in the inbound message. If you send all these details in the inbound message, the system derives an active hold request with the given hold reason, start date, end date, and hold request type combination. However, if you do not send all these details in the inbound message, the system first derives the hold request preference from the **Hold Request Field Mapping** option type of the **C1-HOLDSRCH** feature configuration. Then, the system derives an active hold request using the following attributes of the hold request preference:

- Default Manual Hold Reason
- Default Manual End Date
- Default Manual Hold Request Type Code

If a hold request exists with the respective account or with the accounts of the person, the system changes the status of the hold request to **Released**. While releasing a hold request, the system derives the reason from the **Default Manual Release Reason** attribute of the hold request preference. The bill after date is updated for the accounts on the **C1-HLMON** batch execution.

The system also enables you to discard a hold request through an inbound message. The system changes the status of the hold request to **Discarded** when the **action** tag is set to **R** within the **billHold** tag and the hold request start date is a future date. While discarding a hold request, the system derives the reason from the **Default Manual Discard Reason** attribute of the hold request preference.

Note:

The approval process for hold request is not supported in this feature. Therefore, we recommend you to use a hold request type where the **Activation Approval** or **Release Approval** option is not selected.

This feature is tested and certified for both the fully insured group and fully insured individual lines of business.

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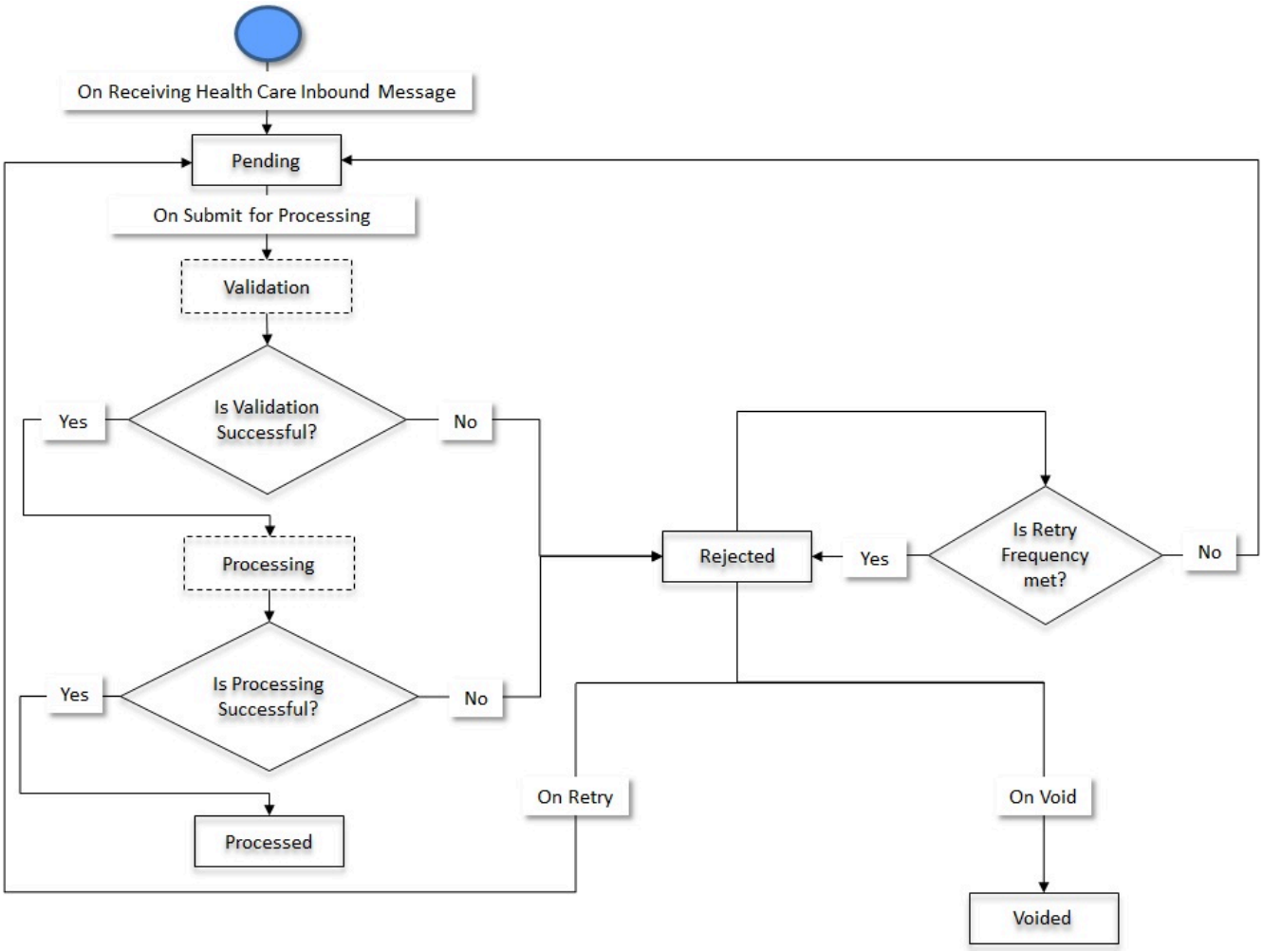
Health Care Inbound Message Status Transition through User Interface

The following figure graphically indicates how a health care inbound message moves from one status to another when it is validated and processed through the user interface:



Health Care Inbound Message Status Transition through a Batch Process

The following figure graphically indicates how a health care inbound message moves from one status to another when it is validated and processed through the **Health Care Inbound Message Periodic Monitor (C1-HCINB)** batch:

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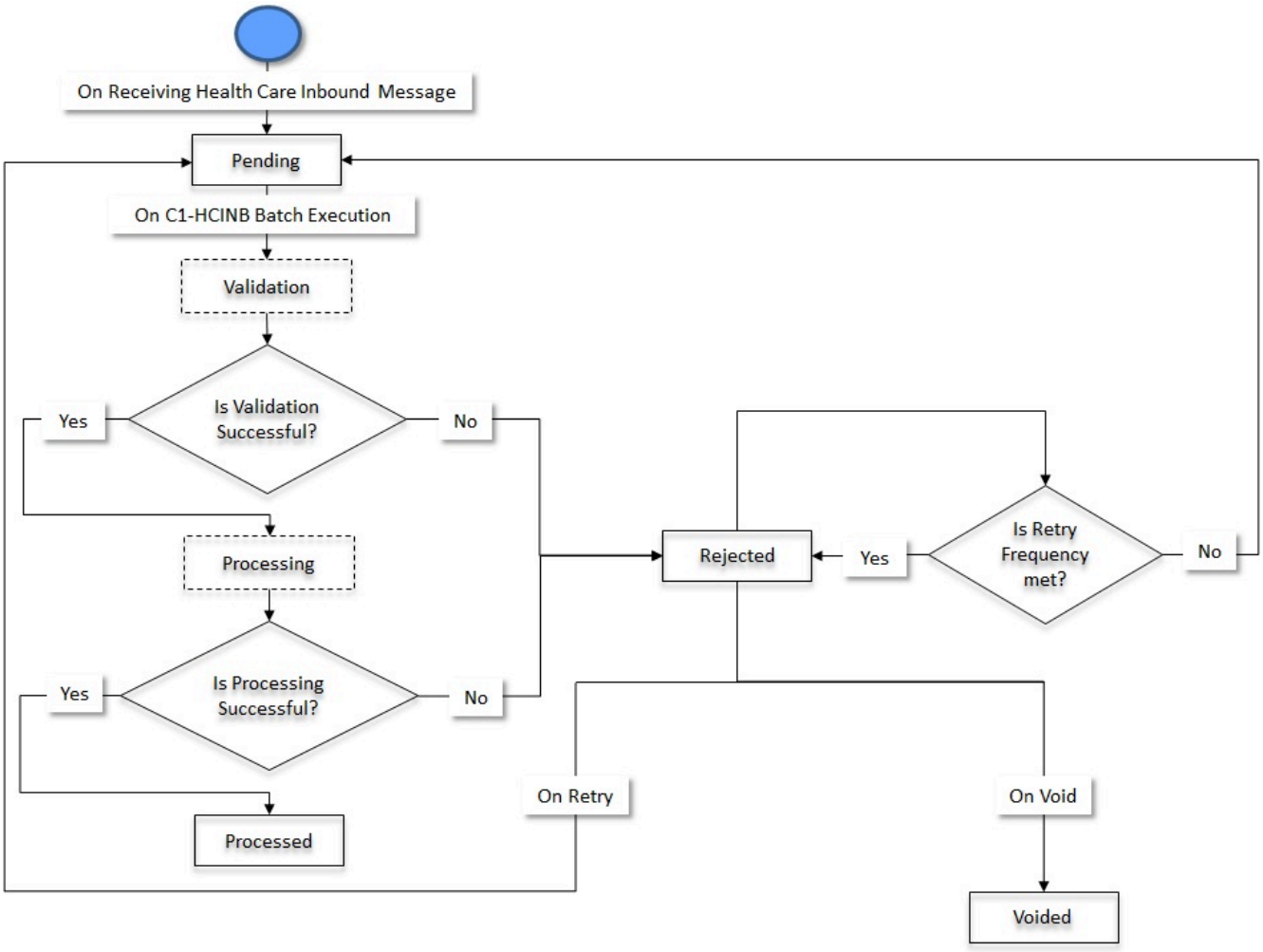

Algorithms Used in C1-HCInboundMessage

The following table lists the algorithms which are used in the lifecycle of the **C1-HCInboundMessage** business object:

Status	System Event	Algorithm	Algorithm Type	Description
Pending	Monitor	C1-AT-RQJ	C1-GEN-BOMNJ	Refer to C1-AT-RQJ on page 2288.
Validation	Monitor	F1-AT-RQJ	F1-GEN-BOMNJ	Refer to F1-AT-RQJ on page 225.
	Enter	C1-HCINVAL	C1-HCINVAL	Refer to C1-HCINVAL on page 2288.
Processing	Monitor	F1-AT-RQJ	F1-GEN-BOMNJ	Refer to F1-AT-RQJ on page 225.
	Enter	C1-HCINPROC	C1-HCINPROC	Refer to C1-HCINPROC on page 2289.
Rejected	Monitor	C1-TODORETRY	C1-TODORETRY	Refer to C1-TODORETRY on page 2289.
	Enter	C1-TDCRINMSG	F1-TDCREATE	Refer to C1-TDCRINMSG on page 2289.
Processed	-	-	-	-
Voided	-	-	-	-

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C1-AT-RQJ

This algorithm is invoked when the status of the customer or membership inbound message is changed to **Pending**. If the **isRetried** flag in the inbound message is set to **true**, it resets the flag to **false**.

It contains the following parameters:

- **Next Status** - Used when you want to override the default next status specified in the lifecycle.
- **Next Transition Condition** - Used when you want to override the default next transition condition specified in the lifecycle.

Note: At a time, you can specify value for either the **Next Status** or **Next Transition Condition** parameter. If you don't specify any value for these parameters, the system will transition the business object to the default next status specified in its lifecycle.

F1-AT-RQJ

This algorithm transitions the current status of the business object to the specified status. It contains the following parameters:

- **Next Status** – Used when you want to override the default next status specified in the lifecycle.
- **Next Transition Condition** – Used when you want to override the default next transition condition specified in the lifecycle.

At a time, you can specify value for either the **Next Status** or **Next Transition Condition** parameter. If you don’t specify any value for these parameters, the system will transition the business object to the default next status specified in its lifecycle.

C1-HCINVAL

Health Care Inbound Message - Validation

This algorithm is invoked when you execute the **Health Care Inbound Message Periodic Monitor (C1-HCINB)** batch or click the **Submit for Processing** button in the **Inbound Message** screen. It validates the health care inbound message which is in the **Pending** status. It checks the following:

- Whether the details of the parent customer are given in the bill group information.
- Whether the primary identifier is specified for the parent customer and bill group.
- Whether multiple primary identifiers are not specified for the parent customer and bill group.
- Whether the expiration year and month are specified in the account's auto pay details when the **Expiration Date Required** option is selected for the tender type which is specified in the auto pay source.
- Whether the expiration year is not earlier than 1755.
- Whether the expiration month lies between 1 and 12.

If the validation fails due to any reason, the status of the health care inbound message is changed to **Rejected**. In addition, the appropriate log entry is added which you can view in the **Inbound Message Log** zone.

It contains the following parameters:

- **Next Status** - Used when you want to override the default next status specified in the lifecycle.
- **Next Transition Condition** - Used when you want to override the default next transition condition specified in the lifecycle.

Note: At a time, you can specify value for either the **Next Status** or **Next Transition Condition** parameter. If you don't specify any value for these parameters, the system will transition the business object to the default next status specified in its lifecycle.

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C1-HCINPROC

This algorithm is invoked once a health care inbound message is successfully validated. It processes the health care inbound message and creates or updates the parent customers, bill groups (including derivation and pricing parameters for the bill group), accounts, self-funded or fully-insured group policies, policy plans, memberships, member persons, pass-through billable charges, and pricing rules. In addition, it allows you to terminate, reinstate, and renew a fully-insured group policy.

If the person type specified in the health care inbound message matches the person type specified in the **Bill Group Person Type** or **Parent Person Type** option type of the **C1-PERSTYPE** feature configuration, the system creates or updates the person, account, policy, policy plan, and address through a customer registration object. The memberships, pass-through billable charges, and pricing rules are created directly and not via customer registration object. However, if the person type specified in the health care inbound message does not match the person type specified in the **Bill Group Person Type** or **Parent Person Type** option type of the **C1-PERSTYPE** feature configuration, the system creates or updates the person and its other entities directly and not through a customer registration object. In this case, the system only refers the customer registration type for the business objects using which the person, account, policy plan, membership, and address should be created or updated in the system.

If the processing fails due to any reason, the status of the health care inbound message is changed to **Rejected**. In addition, the appropriate log entry is added which you can view in the **Inbound Message Log** zone.

It contains the following parameters:

- **Next Status** - Used when you want to override the default next status specified in the lifecycle.
- **Next Transition Condition** - Used when you want to override the default next transition condition specified in the lifecycle.

Note: At a time, you can specify value for either the **Next Status** or **Next Transition Condition** parameter. If you don't specify any value for these parameters, the system will transition the business object to the default next status specified in its lifecycle.

C1-TODORETRY

This algorithm is invoked when the status of the customer or membership inbound message is changed to **Rejected**. It checks whether the maximum retry attempts are met. If the retry attempt is less than or equal to the value defined in the **Maximum Retry** parameter, the status of the inbound message is changed to **Pending**. However, if the retry attempt is greater than the value defined in the **Maximum Retry** parameter, the status of the inbound message remains as **Rejected**.

Note: This algorithm is invoked when the customer or membership inbound message is validated and processed through the batch process.

It contains the following parameters:

- **Maximum Retry** - Used to specify the maximum number of times the inbound message can be revalidated and reprocessed on failure.
- **Maximum Retry Element Name** - This parameter is not used at the moment.

If you do not specify any value for the **Maximum Retry** parameter, the system uses the value defined in the **To Do Maximum Retries** status option (which is defined in the lifecycle of the **C1-CustomerInboundMessage** and **C1-MemberInboundMessage** business object) to check whether the maximum retry attempts are met. If the value is not specified for the **To Do Maximum Retries** status option, the system does not allow revalidating and reprocessing an inbound message, and the status of the inbound message remains as **Rejected**.

C1-TDCRINMSG

This algorithm is invoked when the status of the customer or membership inbound message is changed to **Rejected**. It creates a To Do using the specified To Do type and assigns it to users with the specified To Do role.

It contains the following parameters:

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- **To Do Type** - Used to specify the type of notification that you want to generate when the inbound message validation or processing fails.
- **To Do Role** - Used to specify the To Do role to indicate the users to whom you want to send the notification when the inbound message validation or processing fails.

The rest of the parameters, such as **To Do Type Element Name**, **To Do Role Element Name**, **Message Category**, **Message Number**, **Characteristic Type For Log Entry**, **To Do Sort Keys Retriever Script**, **Discard Cancel Terminate Reason Element**, **Discard Cancel Terminate Reason**, **Retry Frequency**, and **Retry Frequency Element Name**, are not used at the moment.

Health Care Inbound Message XML Format

Note: We recommend you to refer the Health Care Inbound Message schema in parallel while understanding the below mentioned tags. This will help you to understand how the tags are nested in the schema.

Before calling the **C1-HCInboundMessage** inbound web service, you need to ensure that the health care inbound message contains the following tags:

Tag Name	Tag Description	Mandatory (Yes or No)
schema	Used to specify the tags of a health care inbound message.	Yes
bo	Used to indicate the business object using which the health care inbound message should be created in the system. The valid value is: • C1-HCInboundMessage	Yes
messageType	You can use this tag within the following tags: • **schema** - Here, the **messageType** tag indicates the health care inbound message type using which the health care inbound message should be created in the system. **Note:** The system refers the value from within the **headerData** tag. • **headerData** - Here, the **messageType** tag is used to specify the health care inbound message type using which the health care inbound message should be created in the system. **Note:** You must specify a valid health care inbound message type which is in the **Active** status.	Yes
sourceSystem	You can use this tag within the following tags: • **schema** - Here, the **sourceSystem** tag indicates the external system from where the health care inbound message is received. **Note:** The system refers the value from within the **headerData** tag. • **headerData** - Here, the **sourceSystem** tag is used to indicate the external system from where the health care inbound message is received.	Yes

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Tag Name	Tag Description	Mandatory (Yes or No)
	• **billLevelParameters** - Here, the **sourceSystem** tag is used to indicate the source system using which you want to define the derivation and pricing parameters for the bill group. • **memberData** - Here, the **sourceSystem** tag is used to indicate the source system using which you want to derive the policy where the policy plan is defined. • **policyData** - Here, the **sourceSystem** tag is used to indicate the source system from where the policy is originated. **Note:** You must specify a source system which is already defined in the **C1-SourceSystemLookup** extendable lookup. It must be in the **Active** status. This tag is applicable only for the **Self-Funded Group Health Insurance** and **Fully-Insured Group Health Insurance** businesses.	
externalTransactionId	You can use this tag within the following tags: • **schema** - Here, the **externalTransactionId** tag indicates the transaction in the external source system which resulted in the health care inbound message. **Note:** The system refers the value from within the **headerData** tag. • **headerData** - Here, the **externalTransactionId** tag is used to indicate the transaction in the external source system which resulted in the health care inbound message.	No
externalBatchId	You can use this tag within the following tags: • **schema** - Here, the **externalBatchId** tag indicates the external batch job or batch run number through which the health care inbound message is created. **Note:** The system refers the value from within the **headerData** tag. • **headerData** - Here, the **externalBatchId** tag is used to indicate the external batch job or batch run number through which the health care inbound message is created.	Yes
externalSourceId	You can use this tag within the following tags: • **schema** - Here, the **externalSourceId** tag displays the external source system ID. **Note:** The system refers the value from within the **headerData** tag. • **headerData** - Here, the **externalSourceId** tag is used to specify the external source system ID.	Yes
characteristics	You can use this tag within the following tags:	No

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Tag Name	Tag Description	Mandatory (Yes or No)
	• **schema** - Here, the **characteristics** tag is used to specify a list of characteristics for the health care inbound message. • **personData** - Here, the **characteristics** tag is used to specify a list of characteristics for the person. • **relatedPersons** - Here, the **characteristics** tag is used to specify a list of characteristics for the person to person relationship. • **memberData** - Here, the **characteristics** tag is used to specify a list of characteristics for the membership. • **billableChargeData** - Here, the **characteristics** tag is used to specify a list of characteristics for the billable charge. • **accountData** - Here, the **characteristics** tag is used to specify a list of characteristics for the account. • **policyData** - Here, the **characteristics** tag is used to specify a list of characteristics for the policy. • **planData** - Here, the **characteristics** tag is used to specify a list of characteristics for the policy plan. • **pricingRuleData** - Here, the **characteristics** tag is used to specify a list of characteristics for the pricing rule. • **benefitData** - Here, the **characteristics** tag is used to specify a list of characteristics for the membership benefit.	
inboundMessageCharacteristic	Used to specify a characteristic for the health care inbound message.	No
adhocCharacteristicValue	Used to specify the value for the adhoc characteristic type.	Yes (Conditional) **Note:** This data is required while defining or editing an adhoc characteristic of the health care inbound message.

characteristicType	You can use this tag within the following tags:
	• **inboundMessageCharacteristic** - The **characteristicType** tag is used to specify the characteristic type. Here, you must specify a characteristic type where the characteristic entity is set to **Inbound Message**.
	• **characteristicsList** - The **characteristicType** tag is used to specify the characteristic type. If you are defining a characteristic for a:
	  • **Person** - You must specify a characteristic type where the characteristic entity is set to **Person**.
	  • **Related Person** - You must specify a characteristic type where the characteristic entity is set to **Person to Person**.
	  • **Membership** - You must specify a characteristic type where the characteristic entity is set to **Membership**.
	  • **Membership Person** - You must specify a characteristic type where the characteristic entity is set to **Membership Person**.
		Yes (Conditional)
		Note: This data is required while defining or editing a characteristic of the respective entity.

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Tag Name	Tag Description	Mandatory (Yes or No)
	• **Membership Benefit** - You must specify a characteristic type where the characteristic entity is set to **Benefit**. • **Billable Charge** - You must specify a characteristic type where the characteristic entity is set to **Billable Charge**. • **Account** - You must specify a characteristic type where the characteristic entity is set to **Account**. • **Policy** - You must specify a characteristic type where the characteristic entity is set to **Policy**. • **Policy Plan** - You must specify a characteristic type where the characteristic entity is set to **Policy Plan**. • **Pricing Rule** - You must specify a characteristic type where the characteristic entity is set to **Pricing Rule**. • **Pricing Rule** - You must specify a characteristic type where the characteristic entity is set to **Pricing Rule**.	
effectiveDate	You can use this tag within the following tags: • **inboundMessageCharacteristic** - Here, the **effectiveDate** tag is used to specify the date from when the characteristic is effective for the health care inbound message. • **characteristicsList** - Here, the **effectiveDate** tag is used to specify the date from when the characteristic is effective for the respective entity (i.e. person, person to person relationship, membership, member person, billable charge, account, policy, policy plan, pricing rule, or membership benefit). • **billLevelParameters** - Here, the **effectiveDate** tag is used to specify the date from when the derivation and pricing parameters are effective for the bill group. • **policyPlanProrationRuleList** - Here, the **effectiveDate** tag is used to specify the proration rules defined for the policy plan. **Note:** You must specify the date in the `YYYY-MM-DD` format.	Yes (Conditional) **Note:** This data is required while defining or editing a characteristic of the respective entity or while defining the derivation and pricing parameters for the bill group.
characteristicValue	You can use this tag within the following tags: • **inboundMessageCharacteristic** - Here, the **characteristicValue** tag is used to specify the value for the predefined characteristic type. • **characteristicsList** - Here, the **characteristicsList** tag is used to specify the value for the characteristic type.	Yes (Conditional) **Note:** This data is required while defining or editing a characteristic of the respective entity.
customerStructureMessage	Used to specify the details of the customer including the header information for the health care inbound message.	Yes
characteristicValueForeignKey1	Used to specify the first value for the foreign key characteristic type.	Yes (Conditional) **Note:** This data is required while defining or editing a foreign key characteristic of the health care inbound message.

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Tag Name	Tag Description	Mandatory (Yes or No)
characteristicValueFK2	Used to specify the second value for the foreign key characteristic type.	No
characteristicValueFK3	Used to specify the third value for the foreign key characteristic type.	No
characteristicValueFK4	Used to specify the fourth value for the foreign key characteristic type.	No
characteristicValueFK5	Used to specify the fifth value for the foreign key characteristic type.	No
headerData	Used to specify the header information for the health care inbound message.	Yes
personData	Used to specify the details of the parent customer, bill group, or member person.	Yes (Conditional) **Note:** This data is required while defining or editing a person.
accessGroup	You can use this tag within the following tags: • **personData** - Here, the **accessGroup** tag is used to indicate the user group that can access the person data. • **accountData** - Here, the **accessGroup** tag is used to indicate the user group that can access the account data. • **customerStructureData** - Here, the **accessGroup** tag is used to indicate the user group that can access the customer data. **Note:** If you do not specify a value, by default it is set to system default.	No
sequence	You can use this tag within the following tags: • **personData** - Here, the **sequence** tag is used to indicate the order in which the person should be created in the system. • **personName** - Here, the **sequence** tag is used to indicate the order in which the person name should be displayed in the user interface. • **billLevelParameters** - Here, the **sequence** tag is used to indicate the order in which the derivation and pricing parameters should be created for the bill group. • **billableChargeData** - Here, the **sequence** tag is used to indicate the order in which the billable charge should be created for the membership. • **baseRate** - Here, the **sequence** tag is used to indicate the order in which the billable charge should be created for the membership. • **pricingParameter** - Here, the **sequence** tag is used to indicate the order in which the pricing eligibility criteria should be created using the parameter information. • **modifierInformation** - Here, the **sequence** tag is used to indicate the order in which the pricing eligibility criteria should be created using the modifier information.	Yes (Conditional) **Note:** This data is required while defining or editing the respective information.

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Tag Name	Tag Description	Mandatory (Yes or No)
	• **benefitDataList** - Here, the **sequence** tag is used to indicate the order in which the benefit charge should be created for the membership. • **accountData** - Here, the **sequence** tag is used to indicate the order in which the account should be created in the system. • **memberData** - Here, the **sequence** tag is used to indicate the order in which the membership benefit should be created in the system.	
personType	Used to indicate the type of person. The valid values are: • **B** - Indicates that the person is a business owner. • **BG** - Indicates that the person is a bill group. • **G** - Indicates that the person is a group owner. • **K** - Indicates that the person is a broker. • **P** - Indicates that the person is an individual. • **PG** - Indicates that the person is a parent customer. **Note:** You must specify a value which is already defined in the **PER_OR_BUS_FLG** lookup field. It must be in the **Active** status.	Yes (Conditional) **Note:** This data is required while defining or editing a person.
personName	Used to specify a list of names for the person.	Yes (Conditional) **Note:** This data is required while defining a person.
entityName	Used to specify the name of the person.	Yes (Conditional) **Note:** This data is required while defining a person.
nameType	Used to indicate the type of name. The valid values are: • **AL** - Indicates that the type of name is Alias. • **ALT** - Indicates that the type of name is Alternate Representation. • **DBA** - Indicates that the type of name is Doing Business As. • **FORM** - Indicates that the type of name is Former. • **LGAL** - Indicates that the type of name is Legal. • **PRIM** - Indicates that the type of name is Primary. **Note:** You must specify a value which is already defined in the **NAME_TYPE_FLG** lookup field. It must be in the **Active** status.	Yes (Conditional) **Note:** This data is required while defining a person.
identifiers	You can use this tag within the following tags: • **personData** - Here, the **identifiers** tag is used to specify the identification details for the person. • **accountData** - Here, the **identifiers** tag is used to specify the identification details for the account.	Yes (Conditional) **Note:** This data is required while defining or editing the respective information.

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Tag Name	Tag Description	Mandatory (Yes or No)
	Note: You must specify one primary identifier for a person and account.	
idType	You can use this tag within the following tags: • **identifiers** - Here, the **idType** tag is used to specify the person or account identifier type. • **relatedPersons** - Here, the **idType** tag is used to specify the person identifier type. • **mainSubscriber** - Here, the **idType** tag is used to specify the person identifier type. • **accountPerson** - Here, the **idType** tag is used to specify the person identifier type. • **policyPersons** - Here, the **idType** tag is used to specify the person identifier type. **Note:** You must specify a person or account identifier type which is already defined in the system.	Yes (Conditional) **Note:** This data is required in the following scenarios: • While defining or editing the identification details of a person and account. • While defining or editing a person to person relationship. • While defining or editing the membership information of a person. • While linking an account to another person. • While associating a person with a policy.
idValue	You can use this tag within the following tags: • **identifiers** - Here, the **idValue** tag is used to specify the person or account identifier. • **relatedPersons** - Here, the **idValue** tag is used to indicate the person with whom you want to establish the person to person relationship. • **mainSubscriber** - Here, the **idValue** tag is used to indicate the person who is the main subscriber of the membership. • **accountPerson** - Here, the **idValue** tag is used to indicate the person to whom you want to link the account. • **policyPersons** - Here, the **idValue** tag is used to indicate the person to whom you want to associate the policy.	Yes (Conditional) **Note:** This data is required while defining or editing the respective information.
isPrimary	Used to indicate whether the person or account identifier is a primary identifier. The valid values are: • Y • N	No

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Tag Name	Tag Description	Mandatory (Yes or No)
	Note: If you do not specify the value, by default, it is set to **N**. You must specify a value which is already defined in the **F1_YESNO_FLG** lookup field. It must be in the **Active** status.	
division	You can use this tag within the following tags: • **personData** - Here, the **division** tag is used to indicate the division to which the person belongs. • **accountData** - Here, the **division** tag is used to indicate the division to which the account belongs. • **statementConstructDetails** - Here, the **division** tag is used indicate the division to which the statement construct belongs. **Note:** You must specify a division which is already defined in the system.	No
birthDate	Used to specify the date when the person was born. **Note:** You must specify the date in the `YYYY-MM-DD` format.	No
sinceDate	Used to specify the date when the person's record is created in the system. This is purely informational. **Note:** You must specify the date in the `YYYY-MM-DD` format.	No
address	You can use this tag within the following tags: • **personData** - Here, the **address** tag is used to specify the address of the person. • **accountData** - Here, the **address** tag is used to specify the address of the account.	Yes (Conditional) **Note:** This data is required while defining or editing the address of the respective entity.
addressEffDate	Used to specify the date from when the address is effective. **Note:** You must specify the date in the `YYYY-MM-DD` format. If you do not specify the date, by default, the system sets the effective date to the date when the address is created in the system through the health care inbound message.	Yes (Conditional) **Note:** This data is required while editing the address of a person or account.
addressType	Used to indicate the type of address. The valid values are: • **MAIN** - Indicates that the address is the person's mailing address. You can use this address type while specifying the address for the person and account. • **SEAS** - Indicates that the address is the person's seasonal address. You can use this address type while specifying the address for the person.	Yes (Conditional) **Note:** This data is required while editing the address of a person or account.

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Tag Name	Tag Description	Mandatory (Yes or No)
	• **OVRD** - Indicates that the address is the account's override address. You can use this address type while specifying the address for the account. **Note:** If you do not specify the address type, by default, it is set to **MAIN**. You must specify an address type which is already defined in the **ADDRESS_TYPE_FLG** lookup field. It must be in the **Active** status.	
mailingName	Used to specify the name using which the person should be addressed in the mail communication. The system also uses the mailing name in the bills, letters, quotes, and statements.	No
address1	You can use this tag within the following tags: • **address** - Here, the **address1** tag is used to specify the first line of the address. It may contain details, such as the house number. • **personAddressOverride** - Here, the **address1** tag is used to specify the first line of the address. It may contain details, such as the house number.	Yes (Conditional) **Note:** This data is required while defining and editing the address of a person and account.
address2	You can use this tag within the following tags: • **address** - Here, the **address2** tag is used to specify the second line of the address. It may contain details, such as the apartment name. • **personAddressOverride** - Here, the **address2** tag is used to second line of the address. It may contain details, such as the apartment name.	No
address3	You can use this tag within the following tags: • **address** - Here, the **address3** tag is used to specify the third line of the address. It may contain details, such as the street name. • **personAddressOverride** - Here, the **address3** tag is used to specify the third line of the address. It may contain details, such as the street name.	No
address4	You can use this tag within the following tags: • **address** - Here, the **address4** tag is used to specify the fourth line of the address. It may contain the landmark details. • **personAddressOverride** - Here, the **address4** tag is used to specify the fourth line of the address. It may contain the landmark details.	No
city	You can use this tag within the following tags: • **address** - Here, the **city** tag is used to specify the city name. • **personAddressOverride** - Here, the **city** tag is used to specify the city name.	No

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Tag Name	Tag Description	Mandatory (Yes or No)
state	You can use this tag within the following tags: • **address** - Here, the **state** tag is used to indicate the state where the city is located. • **personAddressOverride** - Here, the **state** tag is used to indicate the state where the city is located.	No
zip	Used to specify the zip code of the address.	No
addressStatus	Used to indicate the status of the address. The valid values are: • C1AC • C1IN You can use this tag within the following tags: • **address** - Here, the **addressStatus** tag is used to indicate the status of the address. • **personAddressOverride** - Here, the **addressStatus** tag is used to indicate the status of the address. **Note:** • You must specify a value which is already defined in the **ADDR_STATUS_FLG** lookup field. It must be in the **Active** status. • While creating an address for an entity, the status of the address should always be set to **C1AC** (i.e. Active). The **addressStatus** tag is not mandatory. Therefore, if you do not specify the value for the **addressStatus** tag while creating an address, the system, by default, sets it to **C1AC** (i.e. Active). • For more information on how to update the address status, see Maintaining Address Status through Inbound Web Service	No
country	You can use this tag within the following tags: • **address** - Here, the **country** tag is used to indicate the country where the person or account is located. • **personAddressOverride** - Here, the **country** tag is used to indicate the country where the person is located.	Yes (Conditional) **Note:** This data is required while defining or editing the address of a person or account.
houseType	Used to indicate the type of the house. The valid values are: • **AB** - Indicates that the type of house is a House Boat Reference. • **WW** - Indicates that the type of house is a House Trailer Reference. You can use this tag within the following tags: • **address** - Here, the **houseType** tag is used to indicate the type of the house. • **personAddressOverride** - Here, the **houseType** tag is used to indicate the type of the house.	No

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Tag Name	Tag Description	Mandatory (Yes or No)
	Note: You must specify a house type which is already defined in the **HOUSE_TYPE** lookup field. It must be in the **Active** status.	
streetNumber1	You can use this tag within the following tags: • **address** - Here, the **streetNumber1** tag is used to specify the numeric information, if any, related to the address. • **personAddressOverride** - Here, the **streetNumber1** tag is used to specify the numeric information, if any, related to the address.	No
streetNumber2	You can use this tag within the following tags: • **address** - Here, the **streetNumber2** tag is used to specify the numeric information, if any, related to the address. • **personAddressOverride** - Here, the **streetNumber2** tag is used to specify the numeric information, if any, related to the address.	No

inCityLimit	You can use this tag within the following tags:
	• **address** - Here, the **inCityLimit** tag is used to indicate whether the address is within the city limit. The valid values are:
	  • Y
	  • N
	• **personAddressOverride** - Here, the **inCityLimit** tag is used to indicate whether the address is within the city limit. The valid values are:
	  • Y
	  • N
		No

taxVendorGeographicalCode	You can use this tag within the following tags: • **address** - Here, the **taxVendorGeographicalCode** tag is used to specify the geographic code of the address. • **personAddressOverride** - Here, the **taxVendorGeographicalCode** tag is used to specify the geographic code of the address.	No
county	You can use this tag within the following tags: • **address** - Here, the **county** tag is used to specify the county name. • **personAddressOverride** - Here, the **county** tag is used to specify the county name.	No
email	Used to specify the e-mail ID of the person.	No
overrideMailingName1	Used to specify the name using which you want to override the person's mailing name.	No
overrideMailingName2	Used to specify the name using which you want to override the person's override mailing name 1.	No

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Tag Name	Tag Description	Mandatory (Yes or No)
overrideMailingName3	Used to specify the name using which you want to override the person's override mailing name 2.	No
phones	Used to specify the phone details of the person.	Yes (Conditional) **Note:** This data is required while defining or editing the phone details of a person.
phoneType	Used to indicate the type of phone. **Note:** You must specify a phone type which is already defined in the system.	Yes (Conditional) **Note:** This data is required while defining or editing the phone details of a person.
phoneValue	Used to specify the phone number of the person.	Yes (Conditional) **Note:** This data is required while defining or editing the phone details of a person.
extension	Used to specify the extension value of the phone number.	Yes (Conditional) **Note:** This field is required when you are adding the phone details of a person.
relatedPersons	Used to list other persons with whom you want to establish the person's relationship.	Yes (Conditional) **Note:** This data is required while defining or editing a person to person relationship.
personRelationshipType	Used to indicate how the other person is related to the person. **Note:** You must specify a person relationship type which is already defined in the system. If you have specified a parent customer as the related person for a bill group, the system, by default, uses the person relationship type which is specified in the **Person Relationship Type** option type of the **C1-ASOBLLNG** feature configuration. It does not considers the value specified in this tag.	Yes (Conditional) **Note:** This data is required while creating relationship between a bill group and person whose the person type is not **Parent Customer**.
startDate	You can use this tag within the following tags:	Yes (Conditional)

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<table>
<tr><th>Tag Name</th><th>Tag Description</th><th>Mandatory (Yes or No)</th></tr>
<tr><td></td><td>

relatedPersons - Here, the startDate tag is used to specify the date from when the other person is related to the person.
memberData - Here, the startDate tag is used to specify the date from when the membership is effective.
billableChargeData - Here, the startDate tag is used to specify the start date of the billable charge.
autoPayDetails - Here, the startDate tag is used to specify the date from when the auto pay instruction is effective.
policyData - Here, the startDate tag is used to specify the date from when the policy is effective.
policyPersons - Here, the startDate tag is used to specify the date from when the person is associated with the policy.
planData - Here, the startDate tag is used to specify the date from when the policy plan is effective.
pricingRuleData - Here, the startDate tag is used to specify the date from when the pricing rule is effective.
benefitDataList - Here, the startDate tag is used to specify the date from when the benefit is availed for the membership.

Note:
The start date of the membership benefit cannot be earlier than the membership start date or later than the membership end date.
The membership benefit start date cannot be later than the membership benefit end date.

statementConstructDetails - Here, the startDate tag is used to specify the date from when the statement construct is effective.

Note: You must specify the date in the <code>YYYY-MM-DD</code> format.
</td><td>
Note: This data is required in the following scenarios:

While defining the respective information.
While editing the membership information of a person.
While editing an auto pay instruction of an account.
While editing a pricing rule.

</td></tr>
<tr><td>endDate</td><td>
You can use this tag within the following tags:

relatedPersons - Here, the endDate tag is used to specify the date till when the other person is related to the person.
memberData - Here, the endDate tag is used to specify the date till when the membership is effective.
billableChargeData - Here, the endDate tag is used to specify the end date of the billable charge.
autoPayDetails - Here, the endDate tag is used to specify the date till when the auto pay instruction is effective.
policyData - Here, the endDate tag is used to specify the date till when the policy is effective.
policyPersons - Here, the endDate tag is used to specify the date till when the person is associated with the policy.
planData - Here, the endDate tag is used to specify the date till when the policy plan is effective.
pricingRuleData - Here, the endDate tag is used to specify the date till when the pricing rule is effective.
benefitDataList - Here, the endDate tag is used to specify the date till when the benefit is availed for the membership.

</td><td>
Yes (Conditional)
Note: This data is required while editing the membership information of a person.
</td></tr>
</table>

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Tag Name	Tag Description	Mandatory (Yes or No)
	Note: The end date of the membership benefit cannot be earlier than the membership start date or later than the membership end date. The membership benefit end date cannot be earlier than the membership benefit start date. • **statementConstructDetails** - Here, the **endDate** tag is used to specify the date till when the statement construct is effective. **Note:** You must specify the date in the `YYYY-MM-DD` format.	
financialRelationshipSw	Used to indicate whether the other person is financially responsible for the person. The valid values are: • True • False **Note:** If you do not specify the value, by default, it is set to **False**.	No
parentOrChild	Used to indicate whether the other person is parent or child. The valid values are: • **C** • **P** **Note:** You must specify a value which is already defined in the **PARENT_OR_CHILD_FLG** lookup field. It must be in the **Active** status.	Yes (Conditional) **Note:** This data is required while creating a person to person relationship.
characteristicsList	You can use this tag within the following tags: • **characteristics** - Here, the **characteristicsList** tag is used to specify a characteristic for the respective entity (i.e. person, person to person relationship, membership, billable charge, account, policy, policy plan, pricing rule, or benefit). • **membershipPersonCharacteristic** - Here, the **characteristicsList** tag is used to specify a characteristic for the member person. • **benefitData** - Here, the **characteristicsList** tag is used to specify a characteristic for the membership benefit. • **personStatementConstructs** - Here, the **characteristicsList** tag is used to specify a characteristic for the person.	Yes (Conditional) **Note:** This data is required while defining or editing a characteristic of the respective entity.
billLevelParameters	Used to specify the derivation and pricing parameters for the bill group.	No
billLevelInfo1	Used to specify the employee attribute based on which you want to derive the bill group.	Yes (Conditional)

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Tag Name	Tag Description	Mandatory (Yes or No)
	Note: You must not specify the ampersand (&) character in the value.	**Note:** This data is required while defining the derivation and pricing parameters for a bill group.
billLevelInfo2	Used to specify the employee attribute based on which you want to derive the bill group. **Note:** You must not specify the ampersand (&) character in the value.	No
billLevelInfo3	Used to specify the employee attribute based on which you want to derive the bill group. **Note:** You must not specify the ampersand (&) character in the value.	No
billLevelInfo4	Used to specify the employee attribute based on which you want to derive the bill group. **Note:** You must not specify the ampersand (&) character in the value.	No
memberData	Used to specify basic information about the membership. **Note:** This tag is applicable only for the **Self-Funded Group Health Insurance**, **Fully-Insured Group Health Insurance**, and **Individual Health Insurance** businesses.	Yes (Conditional) **Note:** This data is required while defining or editing the membership details of a person.
memberId	Used to specify the external membership ID. **Note:** Here, you need to specify a membership ID which is maintained in the external source system.	No
memberRelationship	Used to indicate how the main subscriber is related to the membership.	Yes (Conditional) **Note:** This data is required while defining or editing the membership details of a person.
membershipPersonStatus	Used to indicate the status of the person in the membership. The valid values are: • **ACTV** • **CNCL** • **INAC** • **PNEF**	Yes

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Tag Name	Tag Description	Mandatory (Yes or No)
	Note: You must specify a value which is already defined in the **MEMBER_PER_STATUS_FLG** lookup field. It must be in the **Active** status.	
membershipPersonstatusReason	Used to indicate the reason why you want to change the status of the member person. The valid values are: • **ZZAB** • **ZZBN** • **ZZBR** • **ZZBS** • **ZZCN** • **ZZEL** • **ZZNW** • **ZZRE** • **ZZSP** • **ZZTM**	Yes
	Note: You must specify a value which is already defined in the **MEMB_PERS_STAT_RSN_FLG** lookup field. It must be in the **Active** status.	
autoRenew	Used to indicate whether the individual membership should be automatically renewed.	No
	Note: This tag is applicable only for the **Individual Health Insurance** business.	
associatedMemberIdentifierType	Used to indicate the associated membership identifier type.	Yes (Conditional)
	Note: This tag is applicable only for the **Individual Health Insurance** business.	**Note:** This field is required when the associated membership identifier is specified.
associatedMemberIdentifier	Used to specify the value for associated membership identifier type.	Yes (Conditional)
	Note: This tag is applicable only for the **Individual Health Insurance** business.	**Note:** This field is required when the associated membership identifier type is specified.
exchangeFlag	Used to indicate whether the individual membership is purchased from the exchange. The valid values are: • **OFF**	Yes (Conditional)

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Tag Name	Tag Description	Mandatory (Yes or No)
	• **ON** **Note:** This tag is applicable only for the **Individual Health Insurance** business. You must specify a value which is already defined in the **EXCHANGE_FLG** lookup field. It must be in the **Active** status.	**Note:** This field is required when you have purchased the individual membership from an exchange.
exchangeId	Used to specify the exchange from where the individual membership is purchased. **Note:** This tag is applicable only for the **Individual Health Insurance** business.	Yes (Conditional) **Note:** This field is required when you have purchased the individual membership from an exchange.
binderLiabilityAmount	Used to specify the binder liability amount. **Note:** This tag is applicable only for the **Individual Health Insurance** business.	Yes (Conditional) **Note:** This field is required when the **Consider Binder Liability Amount** attribute is set to **Y** in the binder payment preference.
binderPayApplicability	Used to indicate that the system should monitor whether the binder payment is received before activating the individual membership. The valid values are: • Y • N **Note:** This tag is applicable only for the **Individual Health Insurance** business.	Yes
binderPayGraceDays	Used to specify the days which are used to calculate the grace date for the individual membership. **Note:** This tag is applicable only for the **Individual Health Insurance** business.	No
binderPayThreshold	Used to specify the threshold percentage using which the threshold amount should be calculated. **Note:** This tag is applicable only for the **Individual Health Insurance** business.	No
holdBilling	Used to indicate whether you want to hold the bill generation process for the individual membership until the binder payment is received. The valid values are: • Y	Yes

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Tag Name	Tag Description	Mandatory (Yes or No)
	• N **Note:** This tag is applicable only for the **Individual Health Insurance** business.	
membershipRenewalDate	Used to indicate the date when the individual membership should be renewed. **Note:** Renewal date is required for manual renewal of the individual membership. In case of automatic renewal, the membership renewal date is calculated by the system. This tag is applicable only for the **Individual Health Insurance** business.	Yes (Conditional) **Note:** This field is required when you manually want to renew the individual membership.
contractPeriod	Used to indicate the period (in months) for which the individual membership should be automatically renewed. **Note:** This tag is applicable only for the **Individual Health Insurance** business.	Yes (Conditional) **Note:** This field is required if you have entered the membership renewal date.
membershipIdentifier	Used to specify one or more identifiers for the individual membership. **Note:** This tag and all the tags within this parent tag are applicable only for the **Individual Health Insurance** business.	Yes (Conditional) **Note:** This data is required while defining or editing the individual membership details of a person.
membershipIdentifierType	Used to indicate the membership identifier type.	Yes (Conditional) **Note:** This field is required when the membership identifier is specified.
membershipIdentifierValue	Used to specify the value for the membership identifier type.	Yes (Conditional) **Note:** This field is required when the membership identifier type is specified.
isMemberSw	Used to indicate whether the person is a member or a non-member in the membership. The valid values are: • **N** • **Y**	No

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Tag Name	Tag Description	Mandatory (Yes or No)
	Note: You must specify a value which is already defined in the **F1_YESNO_FLG** lookup field. It must be in the **Active** status.	
isFinanciallyResponsible	Used to indicate whether the person is financially responsible for the membership. The valid values are: • **N** • **Y** **Note:** You must specify a value which is already defined in the **F1_YESNO_FLG** lookup field. It must be in the **Active** status.	No

membershipType	You can use this tag within the following tags:
	• **memberData** - Here, the **membershipType** tag is used to indicate the type of membership. The valid values are:
	  • **COBR**
	  • **MDCR**
	  • **RETR**
	  Note:
	  If you want to define an active employee coverage membership, you must leave this field blank.
	  You must specify a value which is already defined in the **MEMBERSHIP_TYPE_FLG** lookup field. It must be in the **Active** status.
	• **mainSubscriber** - Here, the **membershipType** tag is used to specify the policy number.
	• **policyPlanProrationRuleList** - Here, the **membershipType** tag is used to specify the proration rules defined for the policy plan.
		No

externalMedicareBeneficiaryId	Used to indicate the beneficiary (i.e. member person) who has received the Medicare membership benefits. **Note:** This tag is applicable only for the **Fully-Insured Group Health Insurance** and **Individual Health Insurance** businesses.	No
mainSubscriber	Used to indicate whether the person is the main subscriber of the membership. The valid values are: • Yes • No **Note:** This tag and all the tags within this parent tag are only applicable for the **Fully-Insured Group Health Insurance** and **Individual Health Insurance** businesses.	Yes
policyNumber	You can use this tag within the following tags: • **memberData** - Here, the **policyNumber** tag is used to specify the policy number.	Yes (Conditional)

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Tag Name	Tag Description	Mandatory (Yes or No)
	• **policyData** - Here, the **policyNumber** tag is used to specify the policy number. **Note:** This tag is applicable only for the **Self-Funded Group Health Insurance** and **Fully-Insured Group Health Insurance** businesses.	**Note:** This data is required while defining or editing the respective information.
planNumber	You can use this tag within the following tags: • **memberData** - Here, the **planNumber** tag is used to indicate the fully-insured group policy plan for which the membership is created. • **planData** - Here, the **planNumber** tag is used to specify the plan number. **Note:** This tag is applicable only for the **Self-Funded Group Health Insurance** and **Fully-Insured Group Health Insurance** businesses.	Yes (Conditional) **Note:** This data is required while defining or editing the respective information.
healthPlanCode	Used to indicate the health plan for which the main subscriber has enrolled. **Note:** This tag is applicable only for the **Individual Health Insurance** business.	Yes
membershipRateGuarantee	Used to specify information about the rate guarantee. **Note:** This tag and all the tags within this parent tag are applicable only for the **Individual Health Insurance** business.	No
membershipRateGuaranteeList	Used to specify rate guarantee details for each individual membership.	No
rateGuaranteeStartDate	Used to specify the date from when the rate guarantee is available for the individual membership.	Yes (Conditional) **Note:** This data is required while defining or editing the respective information.
rateGuaranteeEndDate	Used to specify the date till when the rate guarantee is available for the individual membership.	Yes (Conditional) **Note:** This data is required while defining or editing the respective information.
rateGuaranteeStatus	Used to indicate the status of the rate guarantee period. The valid values are: • ACTV • INAC	Yes (Conditional) **Note:** This data is required while defining or editing the respective information.

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Tag Name	Tag Description	Mandatory (Yes or No)
	Note: You must specify a value which is already defined in the **RATE_GRNT_STATUS_FLG** lookup field. It must be in the **Active** status.	
membershipPersonCharacteristic	Used to specify a list of characteristics for the member person.	No
benefitData	Used to specify information about the membership benefit.	Yes (Conditional)
	Note: This tag and all the tags within this parent tag are applicable only for the **Fully-Insured Group Health Insurance** and **Individual Health Insurance** businesses.	**Note:** This data is required while defining or editing a membership benefit.
benefitDataList	Used to specify the details of a membership benefit.	Yes (Conditional)
		Note: This data is required while defining or editing a membership benefit.
benefitStatus	Used to indicate the status of the membership benefit. The valid values are: • ACTIVE • DISCARD	Yes (Conditional)
		Note: This data is required while defining or editing a benefit.
	Note: While defining a membership benefit, by default, the status is set to **Active**. On editing a membership benefit, the system inactivates the old record and creates a new record in the system. The status of the old benefit record is set to **Inactive** and the status of the new benefit record is set to **Active**. You can discard an active or inactive membership benefit whenever required.	
benefitSourceFlag	Used to indicate the source (i.e. health insurance exchange) from where the benefit is received for the membership. The valid values are: • **CMS** • **ST**	No
	Note: You must specify a value which is already defined in the **BENEFIT_SRC_FLG** lookup field. It must be in the **Active** status.	
benefitSubTypeFlag	Used to indicate whether the membership benefit is a Medicare Part A, Part B, or Part D benefit, Medicare Part D LIS, Medicare Part D LEP, APTC benefit, or any other membership benefit.	No

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Tag Name	Tag Description	Mandatory (Yes or No)
	Note: You can only specify a benefit sub type which is already defined in the system.	
planBenefitPackageId	Used to indicate the Medicare plan benefit package (i.e. 800 series plan) which is applicable for the membership benefit. **Note:** You can only specify a Medicare plan benefit package which is already defined in the system.	Yes (Conditional) **Note:** This data is required while creating the Medicare Part A, Part B, or Part D membership benefit.
benefitAmount	Used to specify the pass-through amount for the availed membership benefit.	Yes (Conditional) **Note:** This data is required while creating the Medicare Part D LIS, Medicare Part D LEP, APTC, or other membership benefits.
billableChargeData	Used to specify the details for a billable charge. Ideally, this piece of information should be specified in the main subscriber details and not in the member person details. **Note:** This tag and all the tags within this parent tag are applicable only for the **Fully-Insured Group Health Insurance** and **Individual Health Insurance** businesses.	Yes (Conditional) **Note:** This data is required while defining or editing a billable charge of a membership.
accountIdType	Used to specify the account identifier type. **Note:** You must specify an account identifier type which is already defined in the system.	Yes (Conditional) **Note:** This data is required when the **accountIdValue** tag contains the account identifier.
accountIdValue	Used to indicate the account for which you want to create the billable charge.	Yes (Conditional) **Note:** This data is required when the **accountIdType** tag contains the account identifier type.
chargeType	Used to indicate the type of billable charge that you want to create. **Note:** You must specify a charge type which is already defined in the system.	No
priceItemCode	You can use this tag within the following tags:	Yes (Conditional)

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Tag Name	Tag Description	Mandatory (Yes or No)
	• **billableChargeData** - Here, the **priceItemCode** tag is used to indicate the price item for which you want to create the billable charge. • **planData** - Here, the **priceItemCode** tag is used to indicate the price item which you want to associate with the policy plan.	**Note:** This data is required while defining or editing a billable charge of a membership.
description	You can use this tag within the following tags: • **billableChargeData** - Here, the **description** tag is used to specify the description for the billable charge. • **policyData** - Here, the **description** tag is used to specify the description for the policy.	Yes (Conditional) **Note:** This data is required while defining the respective information.
recurringMethod	Used to indicate whether recurring bill segments must be created for the billable charge at the specified intervals. The valid values are: • **BP** - Used when you want to create recurring bill segments at the intervals defined in the bill period. • **FR** - Used when you want to create recurring bill segments at the set invoice frequency. **Note:** You must specify a value which is already defined in the **RECURRING_FLG** lookup field. It must be in the **Active** status.	No
billPeriod	Used to indicate the bill period using which you want to determine the intervals at which the recurring bill segments must be created. **Note:** You must specify a bill period which is already defined in the system.	Yes (Conditional) **Note:** This data is required when the **recurringMethod** tag contains **BP**.
frequency	Used to indicate the invoice frequency at which the recurring bill segments must be created. **Note:** You must specify an invoice frequency which is already defined in the system.	Yes (Conditional) **Note:** This data is required when the **recurringMethod** tag contains **FR**.
billAfterDt	Used to specify the date after which the bill must be generated for the billable charge. **Note:** You must specify the date in the `YYYY-MM-DD` format.	No
billableChargeLines	Used to specify the details for a pass through line in the billable charge.	Yes
descriptionOnBill	Used to specify the information about the pass through line that should appear on the bill.	Yes
currencyCode	Used to indicate the currency in which you want to charge the amount.	Yes

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Tag Name	Tag Description	Mandatory (Yes or No)
	Note: You must specify a currency which is already defined in the system. If you specify a currency other than the account's invoice currency, the system will do the currency conversion if the appropriate exchange rate is available in the system.	
chargeAmount	Used to specify the charge amount.	Yes
showOnBillSw	Used to indicate whether the charge should appear on the person's printed bill. The valid values are: • True • False **Note:** If you do not specify the value, by default, it is set to **True**.	No
appearInSummarySw	Used to indicate whether the charge should be included in the summary line. The valid values are: • true • false **Note:** If you do not specify the value, by default, it is set to **false**.	No
distributionCode	Used to specify the distribution code which indicates the GL account associated with the charge. **Note:** You must specify a distribution code which is already defined in the system.	No
accountData	Used to specify the account details of a person.	Yes (Conditional) **Note:** This data is required while defining or editing an account.
accountType	Used to indicate the type of account. This information is stored as a characteristic for the account. **Note:** The value is stored in the characteristic type which is specified in the **Invoice Type Characteristic Type** option type of the **C1-ASOBLLNG** feature configuration. You must specify a value which is already defined in the predefined characteristic type.	Yes (Conditional) **Note:** This data is required while defining or editing an account.
customerClass	Used to indicate the customer class to which the account belongs. **Note:** You must specify a customer class which is already defined in the system.	Yes (Conditional)

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Tag Name	Tag Description	Mandatory (Yes or No)
		Note: This data is required while defining an account.
billCycle	Used to indicate the bill cycle for the account. **Note:** You must specify a bill cycle which is already defined in the system.	No
billLeadDays	Used to indicate whether you want to bill the account in advance. Here, you need to specify the number of days which is used to derive the cut-off date for advance billing. If you do not want to bill the account in advance, you must specify the value as zero(0). **Note:** If you do not specify the value, by default, it is set to zero(0).	No
currency	Used to indicate the currency in which you want to bill the account. **Note:** You must specify a currency which is already defined in the system.	Yes (Conditional) **Note:** This data is required while defining an account.
dragDays	You can use this tag within the following tags: • **personData** - Here, the **dragDays** tag is used to specify additional grace days (if any) offered at the person level. These drag days are considered while calculating the grace end date when the trigger date calculation mode (in the respective delinquency process type) is set to **Latest Bill Due Date with Grace Period**. **Note:** For example, if the latest bill due date is 05-Jan-2024, grace period is set to 5 days (in the respective delinquency process type), and drag days is to 10 days (for the respective person), then the grace end date for the person is set to 20-Jan-2024. • **accountData** - Here, the **dragDays** tag is used to specify additional grace days (if any) offered at the account level. These drag days are considered while calculating the grace end date when the trigger date calculation mode (in the respective delinquency process type) is set to **Latest Bill Due Date with Grace Period**. **Note:** For example, if the latest bill due date is 05-Jan-2024, grace period is set to 5 days (in the respective delinquency process type), and drag days is to 10 days (for the respective account), then the grace end date for the account is set to 20-Jan-2024.	Yes (Conditional) **Note:** This data is required while defining an account.
setUpDate	Used to specify the date when the account was first created. This is purely informational.	No

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Tag Name	Tag Description	Mandatory (Yes or No)
	Note: You must specify the date in the `YYYY-MM-DD` format. If you do not specify the value, by default, it is set to the current date.	
acctUsageFlg	Used to indicate the category to which the account belongs. The valid values are: • **INVC** - Indicates that the account will be used to bill charges of the usage accounts. • **SETL** - Indicates that the account will be used only for settlement purposes. • **USAG** - Indicates that the account will have its own charges. If the usage account is linked to any construct, the usage account's charges are billed through an invoice account. Otherwise, the usage account is billed individually.	No
	Note: If you do not specify the value, by default, it is set to **USAG**. You must specify a value which is already defined in the **ACCT_USAGE_FLG** lookup field. It must be in the **Active** status.	
comments	You can use this tag within the following tags: • **accountData** - Here, the **comments** tag is used to specify additional information about the account. • **autoPayDetails** - Here, the **comments** tag is used to specify additional information about the auto pay instruction.	No
deferAutoPayDt	Used to specify the date till when you want to hold the automatic payment process for the account.	No
collectionClass	You can use this tag within the following tags: • **personData** - Here, the **collectionClass** tag is used to control how the person's debt is compared against collection criteria (i.e. tolerance limit) to determine whether a collection process (such as delinquency process) should be initiated for the person. A new collection method named **Self-Control Delinquency** is available while defining a collection class. It is used to create a distinct or separate delinquency process for the persons who belong to the collection class. If you want to evaluate the debt of the person's accounts, its child persons, and the child persons' accounts while monitoring the person's delinquency, you must set the collection method of their respective collection class to **Parental Delinquency**. If you set the collection method of the collection class for any of the person's account, any of its child person, or child persons' accounts to **Self-Control Delinquency**, the system does not consider the debt of the respective entity while monitoring the delinquency of the parent person.	No

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Tag Name	Tag Description	Mandatory (Yes or No)
	Note: If you do not want to initiate delinquency process for a child person or an account, ensure that the person or account belongs to a collection class where the collection method is set to **Not Eligible for Collection**. If the collection class is not defined for a person, the system skips the person while monitoring the delinquency. • **accountData** - Here, the **collectionClass** tag is used to control how the account's debt is compared against collection criteria (i.e. tolerance limit) to determine whether a collection process (such as delinquency process) should be initiated for the account. A new collection method named **Self-Control Delinquency** is available while defining a collection class. It is used to create a distinct or separate delinquency process for the accounts which belong to the collection class. **Note:** If you do not want to initiate delinquency process for an account, ensure that the account belongs to a collection class where the collection method is set to **Not Eligible for Collection**. If the collection class is not specified for an account, the system, by default, sets it to the one specified in the respective customer class when you create the account through a health care inbound message. **Note:** You must specify a collection class which is already defined in the system. This tag is applicable only for the **Fully-Insured Group Health Insurance** and **Individual Health Insurance** businesses.	
postponeCreditReviewUntil	Used when you want to review the account's debt after a particular date. The system will consider the account for monitoring the delinquency only after the specified date. You can specify the postpone credit review until date for an account from the user interface or through a health care inbound message. **Note:** This tag is applicable only for the **Fully-Insured Group Health Insurance** and **Individual Health Insurance** businesses.	Yes (Conditional) **Note:** This data is required while defining or editing the respective information.
lastCreditReviewDate	Used to indicate the date when the account's debt was last reviewed. The system stamps the last credit review date against an account when a delinquency process is initiated for the account through the **C1-ACDLQ** batch.	Yes (Conditional) **Note:** This data is required while defining or editing the respective information.

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Tag Name	Tag Description	Mandatory (Yes or No)
	Note: This tag is applicable only for the **Fully-Insured Group Health Insurance** and **Individual Health Insurance** businesses.	
billRouteType	You can use this tag within the following tags: • **accountData** - Here, the **billRouteType** tag is used to indicate how the account's bill must be sent to the main customer. • **accountPersonRouting** - Here, the **billRouteType** tag is used to indicate how the account's bill must be sent to the linked person. **Note:** You must specify a bill route type which is already defined in the system.	Yes (Conditional) **Note:** This data is required while defining or editing the respective information.
billAddressSource	Used to indicate whether the account's bill must be sent to the main customer's mailing address or to the main customer's account override address. The valid values are: • **ACCT** • **ACOV** • **BILL** • **MAIN** • **PER** • **TEST** You can use this tag within the following tags: • **accountData** - Here, the **billRouteType** tag is used to indicate whether the account's bill must be sent to the main customer's mailing address or to the main customer's account override address. • **accountPersonRouting** - Here, the **billRouteType** tag is used to indicate whether the account's bill must be sent to the linked person's mailing address or to the linked person's account override address. **Note:** You must specify a value which is already defined in the **BILL_ADDR_SRCE_FLG** lookup field. It must be in the **Active** status.	Yes (Conditional) **Note:** This data is required while defining the respective information.
skipAutoMaintenanceSw	Used to specify whether auto maintenance should be skipped for an account. **Note:** This tag is applicable only for the **Individual Health Insurance** business.	Yes (Conditional) **Note:** This data is required while defining the respective information.
autoPayDetails	Used to specify the auto pay instruction for the account.	Yes (Conditional)

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Tag Name	Tag Description	Mandatory (Yes or No)
		Note: This data is required while defining or editing an auto pay instruction of an account.
priority	Used to indicate the priority in which the auto pay instruction should be considered when multiple auto pay instructions are effective on the bill's due date. **Note:** The priority cannot be less than or equal to zero.	Yes (Conditional) **Note:** This data is required while defining or editing an auto pay instruction of an account.
percentage	Used to indicate the percentage in which the payment must be split between two or more auto pay sources having the same priority.	Yes (Conditional) **Note:** This data is required while defining or editing the split auto pay instruction for an account.
autoPayMethod	Used to indicate how you want to process the automatic payment request. The valid values are: • **C1DD** - Indicates that you want to directly debit the main customer's bank account. • **C1PA** - Indicates that you want to send a payment advice to the main customer. **Note:** You must specify a value which is already defined in the **APAY_METHOD_FLG** lookup field. It must be in the **Active** status.	No
autoPayRouteType	Used to indicate when and how automatic payment request of the account is routed to a financial institution. **Note:** You must specify an auto pay route type which is already defined in the system.	Yes (Conditional) **Note:** This data is required while defining or editing an auto pay instruction of an account.
autoPaySourceCode	Used to indicate the financial institution that receives the automatic payment request. **Note:** You must specify an auto pay source which is already defined in the system.	Yes (Conditional) **Note:** This data is required while defining or editing an auto pay instruction of an account.
accountNumber	Used to indicate the bank account number through which the automatic payment must be done.	Yes (Conditional)

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Tag Name	Tag Description	Mandatory (Yes or No)
		Note: This data is required while defining or editing an auto pay instruction of an account.
expiryMonth	Used to specify the month when the tender type of the auto pay source will expire. **Note:** You must specify the month in the `MM` format.	Yes (Conditional) **Note:** This data is required when the **Expiration Date Required** option is selected for the tender type which is specified in the auto pay source.
expiryYear	Used to specify the year when the tender type of the auto pay source will expire. **Note:** You must specify the year in the `YYYY` format.	Yes (Conditional) **Note:** This data is required when the **Expiration Date Required** option is selected for the tender type which is specified in the auto pay source.
name	Used to specify the name of the person as it appears in the financial institution's system.	No
maxWithdrawalAmount	Used to specify the maximum amount that can be automatically debited from the bank account. It is used to set the limit on the withdrawal amount. **Note:** The maximum withdrawal amount cannot be less than zero.	No
accountPerson	Used to specify information about the person (other than main customer) to whom you want to link the account.	Yes (Conditional)

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<table>
<tr><th>Tag Name</th><th>Tag Description</th><th>Mandatory (Yes or No)</th></tr>
<tr><td></td><td>Note:
The system, by default, adds the person (for whom the account information is given in the health care inbound message) as the main customer of the account. While linking the person as main customer of the account, the system sets the following attributes:
<table><tr><th>Attribute Name</th><th>Attribute Value</th></tr><tr><td>Financially Responsible</td><td>Y</td></tr><tr><td>Account Relationship Type</td><td>Main Customer</td></tr><tr><td>Receive Copy of Bill</td><td>Y</td></tr><tr><td>Bill Format</td><td>Detailed</td></tr><tr><td>Receives Notification</td><td>Y</td></tr><tr><td>Number of Bill Copies</td><td>1</td></tr></table></td><td>Note: This data is required while linking a person to an account.</td></tr>
<tr><td>accountRelationshipType</td><td>Used to indicate how the person is related to the account.
Note: You must specify an account relationship type which is already defined in the system.</td><td>Yes (Conditional)
Note: This data is required while linking a person to an account.</td></tr>
<tr><td>isFinanciallyResponsible</td><td>Used to indicate whether the person is financially responsible for the account. The valid values are:
• True
• False
Note: If you do not specify the value, by default, it is set to False.</td><td>No</td></tr>
<tr><td>personAddressOverride</td><td>Used to specify the account override address for the linked person.</td><td>No</td></tr>
<tr><td>postal</td><td>Used to specify the postal code of the address.</td><td>No</td></tr>
<tr><td>accountPersonRouting</td><td>Used to specify the bill routing information for the linked person.</td><td>Yes (Conditional)
Note: This data is required while defining or editing the bill routing information of a linked person.</td></tr>
<tr><td>shouldReceiveCopyOfBill</td><td>Used to indicate whether the linked person should receive a copy of the account's bill. The valid values are:
• Y
• N
Note: If you do not specify the value, by default, it is set to N.</td><td>No</td></tr>
</table>

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Tag Name	Tag Description	Mandatory (Yes or No)
billFormat	Used to indicate whether the linked person should receive the detailed or summary bill. The valid values are: • D • S	No
	Note: You must specify a value which is already defined in the **BILL_FORMAT_FLG** lookup field. It must be in the **Active** status. If you do not specify the value, by default, it is set to **D** when the linked person should receive a copy of the account's bill. This information is ignored when the **shouldReceiveCopyOfBill** tag contains **N**.	
numberOfBillCopies	Used to indicate the number of copies of the bill which the linked person must receive.	No
	Note: If you do not specify the value, by default, it is set to **1** when the linked person should receive a copy of the account's bill. This information is ignored when the **shouldReceiveCopyOfBill** tag contains **N**.	
receivesNotification	Used to indicate whether the linked person should receive letters (i.e. notifications) initiated by collection, write-off, and overdue events. The valid values are: • Y • N	No
	Note: If you do not specify the value, by default, it is set to **N**. This information is ignored when the **shouldReceiveCopyOfBill** tag contains **N**.	
policyData	Used to specify the details of the policy.	Yes (Conditional)
	Note: This tag and all the tags within this parent tag are only applicable for the **Self-Funded Group Health Insurance** and **Fully-Insured Group Health Insurance** businesses.	**Note:** This data is required while defining or editing a policy.
policyType	Used to indicate the policy type using which you are defining the policy.	Yes (Conditional)

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Tag Name	Tag Description	Mandatory (Yes or No)
	Note: You must specify a policy type which is already defined in the system. If you want to create a fully-insured group policy, you must specify a policy type where the policy category is set to **Fully-Insured Group**. However, if you want to create a self-funded policy, you must specify a policy type where the policy category is set to **Self-Funded**.	**Note:** This data is required while defining or editing a policy.
advancedLevelFundingEligibility	Used to indicate whether the self-funded policy provides advanced level funding eligibility. The valid values are: • Y • N	Yes (Conditional) **Note:** This data is required while defining or editing a policy.
	Note: You must specify a value which is already defined in the **F1_YESNO_FLG** lookup field. It must be in the **Active** status. At present, if you are defining a self-funded policy the advanced level funded eligibility is set to **No**. This tag and all the tags within this parent tag are only applicable for the **Self-Funded Group Health Insurance** and **Fully-Insured Group Health Insurance** businesses.	
runOutEndDate	Used to specify the date when the runout period of the self-funded policy ends.	No
	Note: The runout end date cannot be earlier than or equal to the policy end date. This data is required when you are defining a policy using a policy type where the policy category is set to **Self-Funded**. This tag is applicable only for the **Self-Funded Group Health Insurance** business.	
runOutAdminOption	Used to indicate whether the administration fees must be charged when the claim transaction for the self-funded policy is processed in the runout period. The valid values are: • **ENGO** • **ENLA** • **NROA** • **PERC**	No

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Tag Name	Tag Description	Mandatory (Yes or No)
	Note: You must specify a value which is already defined in the **RUNOUT_ADM_OPT_FLG** lookup field. It must be in the **Active** status. At present, this data is used only for the informational purposes and is not considered during the billable charge creation for the claim transactions which are received in the runout period of the policy. This data is required when you are defining a policy using a policy type where the policy category is set to **Self-Funded**. This tag is applicable only for the **Self-Funded Group Health Insurance** business.	
renewalDate	Used to specify the date when you want to renew the fully-insured group policy.	Yes (Conditional) **Note:** This data is required while renewing a fully-insured group policy.
	Note: You can renew a self-funded policy only from the user interface. You must specify the date in the `YYYY-MM-DD` format. This tag is applicable only for the **Self-Funded Group Health Insurance** and **Fully-Insured Group Health Insurance** businesses.	
advanceDepositApplSW	Used to indicate whether the advance deposit is applicable for the policy. The valid values are: • Y • N	No
	Note: This tag is required only when the advance deposit level of the respective policy holder (i.e., parent customer) is set to **POLI**. However, this tag is not mandatory. If you do not specify the value, the system, by default, sets it to **N**. This tag is applicable only for the fully-insured group business. In other words, this tag is applicable only when you create a policy using a policy type where the policy category is set to **Fully-Insured Group**. For more information about the feature, see Allocate Advance Deposit for Delinquent Customers on page 4189.	
advanceDepositAmount	You can use this tag within the following tags: • **personData** - Here, the **advanceDepositAmount** tag is used to specify the advance deposit amount that will be parked at the	Yes (Conditional)

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Tag Name	Tag Description	Mandatory (Yes or No)
	parent customer level. It is required when the advance deposit level of the respective policy holder (i.e., parent customer) is set to **PG**. • **policyData** - Here, the **advanceDepositAmount** tag is used to specify the advance deposit amount that will be parked at the policy level. It is required when the advance deposit level of the respective policy holder (i.e., parent customer) is set to **POLI** and the advance deposit applicability for the policy is set to **Y**. Note that the **advanceDepositAmount** tag is applicable only when you create a policy using a policy type where the policy category is set to **Fully-Insured Group**. **Note:** You must specify a positive value in this field. This tag is applicable only for the fully-insured group business. For more information about the feature, see Allocate Advance Deposit for Delinquent Customers on page 4189.	**Note:** This data is required when you want to allocate advance deposit for delinquent customers.
advanceDepositGraceDays	You can use this tag within the following tags: • **personData** - Here, the **advanceDepositGraceDays** tag is used to specify the grace days. The system then uses the grace days to derive the grace period within which the advance deposit should be received from the group customer. While calculating the grace period, the system derives the earliest start date among all the polices where the parent customer is the policy holder and considers it as the grace start date. Once the grace start date is derived, the system calculates the grace end date (i.e. grace start date + grace days). For example, if a parent customer is the policy holder of two policies - P1 (01-Jan-2022 to 31-Dec-2022) and P2 (01-Jun-2022 to 31-Dec-2022) and advance deposit grace days is set to 6 days, then the system considers 01-Jan-2022 as the grace start date (as it is the earliest start date) and sets the grace end date to 07-Jan-2022. The advance deposit grace days is required when the advance deposit level of the respective policy holder (i.e., parent customer) is set to **PG**. • **policyData** - Here, the **advanceDepositGraceDays** tag is used to specify the grace days. The system then uses the grace days to derive the grace period within which the advance deposit should be received from the group customer for the policy. While calculating the grace period, the system considers the policy start date as the grace start date. Once the grace start date is derived, the system calculates the grace end date (i.e. grace start date + grace days). For example, if a parent customer is the policy holder of the P1 policy (01-Jan-2022 to 31-Dec-2022) and advance deposit grace days is set to 6 days, then the system considers 01-Jan-2022 as the grace start date and sets the grace end date to 07-Jan-2022. The advance deposit grace days is required when the advance deposit level of the respective policy holder (i.e., parent customer) is set to **POLI** and the advance deposit applicability for the policy is set to **Y**. Note that the	Yes (Conditional) **Note:** This data is required when you want to allocate advance deposit for delinquent customers.

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Tag Name	Tag Description	Mandatory (Yes or No)
	advanceDepositGraceDays tag is applicable only when you create a policy using a policy type where the policy category is set to **Fully-Insured Group**. **Note:** You must specify an integer value in this field. This tag is applicable only for the fully-insured group business. For more information about the feature, see Allocate Advance Deposit for Delinquent Customers on page 4189.	
advanceDepositLevel	Used to indicate whether you want to park the advance deposit received from the group customer at the parent customer or policy level. The valid values are: • **PG** - Used when you want to park the advance deposit at the parent customer level. • **POLI** - Used when you want to park the advance deposit at the policy level. **Note:** The advance deposit level is only applicable for the person whose person type is set to **Parent Customer**. If you do not specify the advance deposit level, then the parent customer is not eligible for the advance deposit either at the parent customer or policy level. You must specify a value which is already defined in the **ADV_DEP_LVL_FLG** lookup field. This tag is applicable only for the fully-insured group business. For more information about the feature, see Allocate Advance Deposit for Delinquent Customers on page 4189.	Yes (Conditional) **Note:** This data is required when you want to allocate advance deposit for delinquent customers.
advanceDepositAccountIdentifierType	Used to specify the account identifier type. It is required when the advance deposit level of the respective policy holder (i.e., parent customer) is set to **POLI** and the advance deposit applicability for the policy is set to **Y**. Note that the **advanceDepositAccountIdentifierType** tag is applicable only when you create a policy using a policy type where the policy category is set to **Fully-Insured Group**. **Note:** You must specify an account identifier type which is already defined in the system. This tag is applicable only for the fully-insured group business. For more information about the feature, see Allocate Advance Deposit for Delinquent Customers on page 4189.	Yes (Conditional) **Note:** This data is required when you want to allocate advance deposit for delinquent customers.
advanceDepositAccountIdentifierValue	Used to specify the account identifier. It is required when the advance deposit level of the respective policy holder	Yes (Conditional)

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Tag Name	Tag Description	Mandatory (Yes or No)
	(i.e., parent customer) is set to **POLI** and the advance deposit applicability for the policy is set to **Y**. Note that the **advanceDepositAccountIdentifierValue** tag is applicable only when you create a policy using a policy type where the policy category is set to **Fully-Insured Group**.	**Note:** This data is required when you want to allocate advance deposit for delinquent customers.
	Note: You must specify an account with the account relationship type that is specified in the **Advance Deposit Account Relationship Type** attribute of the delinquency process preference. The system considers the delinquency process preference which is specified in the **Delinquency Process Field Mapping** option type of the **DELINPROC** feature configuration. For more information about the feature configuration, see Setting the DELINPROC Feature Configuration on page 4442. This tag is applicable only for the fully-insured group business. For more information about the feature, see Allocate Advance Deposit for Delinquent Customers on page 4189.	
policyPersons	Used to indicate the person that you want to associate with the policy.	Yes
policyPerRole	Used to indicate the role of the person in the policy.	Yes (Conditional)
	Note: You must specify a policy person role which is already defined in the system.	**Note:** This data is required while associating a person with the policy.
terminationInformation	Used to specify the termination details of the fully-insured group policy.	No
	Note: At present, you cannot terminate a self-funded policy either from the user interface or through a health care inbound message. This tag and all the tags within this parent tag are applicable only for **Fully-Insured Group Health Insurance** business.	
terminateDate	Used to specify the date when you want to terminate the fully-insured group policy.	Yes (Conditional)
	Note: You must specify the date in the `YYYY-MM-DD` format. The termination date cannot be earlier than the policy start date. On terminating a policy, the status of the policy is changed to the status which is specified in the **Policy Termination Status** option type of the **C1-ASOBLLNG** feature configuration.	**Note:** This data is required while terminating a fully-insured group policy.

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Tag Name	Tag Description	Mandatory (Yes or No)
terminationReason	Used to indicate the reason why you want to terminate the fully-insured group policy. **Note:** You must specify the status reason which is already defined for the status specified in the **Policy Termination Status** option type of the **C1-ASOBLLNG** feature configuration.	Yes (Conditional) **Note:** This data is required while terminating a fully-insured group policy.
reinstateInformation	Used to specify the reinstatement details of the fully-insured group policy. **Note:** At present, you cannot reinstate a self-funded policy either from the user interface or through a health care inbound message. This tag and all the tags within this parent tag are applicable only for **Fully-Insured Group Health Insurance** business.	No
reinstatementDate	Used to specify the date when you want to reinstate the fully-insured group policy. **Note:** You must specify the date in the `YYYY-MM-DD` format. The reinstatement date cannot be earlier than the policy start date. On reinstating a policy, the status of the policy is changed to the status which is specified in the **Policy Reinstatement Status** option type of the **C1-ASOBLLNG** feature configuration.	Yes (Conditional) **Note:** This data is required while reinstating a fully-insured group policy.
reinstateReason	Used to indicate the reason why you want to reinstate the fully-insured group policy. **Note:** You must specify the status reason which is already defined for the status specified in the **Policy Reinstatement Status** option type of the **C1-ASOBLLNG** feature configuration.	Yes (Conditional) **Note:** This data is required while reinstating a fully-insured group policy.
planData	Used to specify the details of the policy plan. **Note:** At present, you can only define a policy plan in a fully-insured group policy. Therefore, the system will ignore this information when given for a self-funded policy. This tag and all the tags within this parent tag are applicable only for the **Self-Funded Group Health Insurance** and **Fully-Insured Group Health Insurance** businesses.	Yes (Conditional) **Note:** This data is required while defining or editing a policy plan.
planName	Used to specify the description of the policy plan.	No
pricingRuleTypeList	Used to associate a pricing rule type with the policy plan.	Yes (Conditional)

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Tag Name	Tag Description	Mandatory (Yes or No)
		Note: This data is required while associating a pricing rule type with the policy plan.
pricingRuleType	Used to specify the pricing rule type.	Yes (Conditional)
	Note: At present, you can only associate those pricing rule types where the category is set to **Age Based**, **Tier Based**, or **Pass-Through Billable Charge**. Therefore, the system will ignore the pricing rule types where the category is set to **Claim**, **Specific Stop-Loss**, **Aggregate Stop-Loss**, **Retention Type Claim Based**, **Retention Type Enrollment Based**, **Flat Fees**, **Ancillary**, **Discount Arrangement**, or **Level Funded**.	**Note:** This data is required when a price item is not associated with the policy plan.
primaryPlanSw	Used to indicate whether the plan is a primary plan in the policy. The valid values are: • Y • N	No
	Note: If you do not specify the value, by default, it is set to **N**.	
benefitTypeFlag	Used to indicate the type of benefit availed for the membership. The valid values are: • COMM • MA	Yes
	Note: You must specify a value which is already defined in the **BENEFIT_TYPE_FLG** lookup field. It must be in the **Active** status.	
policyPlanProrationRuleList	Used to specify the proration rules defined for the policy plan.	Yes (Conditional)
	Note: This tag and all the tags within this parent tag are applicable only for **Fully-Insured Group Health Insurance** business.	**Note:** This data is required while defining or editing the proration rules for the policy plan.
prorationEventType	Used to indicate the event when you want to prorate the membership premium. The valid values are: • **ENRL** - Used when you want to prorate the membership premium on enrolling a member person. • **TERM** - Used when you want to prorate the membership premium on terminating a member person. • **NWBR** - Used when you want to prorate the membership premium on enrolling a new born. • **SMET** - Used when you want to prorate the membership premium on enrolling and terminating a member person in the same month.	Yes (Conditional) **Note:** This data is required while defining or editing the proration rules for the policy plan.

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Tag Name	Tag Description	Mandatory (Yes or No)
	Note: You must specify a value which is already defined in the **PRORATION_EVT_TYPE_FLG** lookup field. It must be in the **Active** status.	
prorationType	Used to indicate how you want to prorate the membership premium. The valid values are: • **DALY** - Used when you want to prorate the membership premium from the day the proration event has occurred. • **MDMT** - Used when you want to prorate the membership premium based on the proration date. The system calculates the proration date using the following formula: `Bill Period Start Date + Specified ' Number of Days` For example, if the bill period start date is 1st of every month and number of days is 15, then the proration date would be 15th of every month. If a member person is enrolled to the membership on or before the proration date, the system will charge the premium for the member person. However, if a member person is enrolled to the membership after the proration date, the system will not charge the premium for the member person. And, if a member person is terminated from the membership on or after the proration date, the system will charge the premium for the member person. However, if a member person is terminated from the membership before the proration date, the system will not charge the premium for the member person. • **FLMT** - Used when the premium for a member person should be charged when the member person is enrolled or terminated on the coverage start date or coverage end date, respectively. If a member person is enrolled or terminated within the coverage period, the system will not charge the premium for the member person. • **WAVR** - Used when the premium for a member person should be waived off completely for the month when the member person is enrolled or terminated from the membership. • **COVD** - Used when you want to prorate the premium for a member person based on the coverage days. If a member person is covered in the membership for a period less than the specified number of days, the system will not charge the premium for the member person. However, if a member person is covered in the membership for a period equal to or more than the specified number of days, the system will charge the premium for the member person. **Note:** You can use this proration type when the proration event is set to **Same Month Enrollment and Termination**. • **ENRL** - Used when you want to prorate the premium for a member person using the proration type of the enrollment event. **Note:** You can use this proration type when the proration event is set to **Same Month Enrollment and Termination**.	Yes (Conditional) **Note:** This data is required while defining or editing the proration rules for the policy plan.

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Tag Name	Tag Description	Mandatory (Yes or No)
	• **TERM** - Used when you want to prorate the premium for a member person using the proration type of the termination event. **Note:** You can use this proration type only when the proration event is set to **Same Month Enrollment and Termination**. **Note:** You must specify a value which is already defined in the **PRORATION_TYPE_FLG** lookup field. It must be in the **Active** status.	
numberOfDays	Used to specify the number of days to determine the cutoff date.	Yes (Conditional) **Note:** This data is required when the proration type is set to **Mid-Month** or **Coverage Days**.
pricingRuleData	Used to specify the details of the pricing rule. **Note:** This tag and all the tags within this parent tag are applicable only for the **Fully-Insured Group Health Insurance** business.	Yes (Conditional) **Note:** This data is required while defining or editing a pricing rule.
entityIdentifiers	Used to specify a list of entities (i.e. policy, source system, and plan) using which you can derive the plan to which you want to associate the pricing rule.	Yes
entityIdentifiersList	Used to specify the details of the entity.	Yes
entityIdentifierType	Used to specify the entity type. The valid values are: • **HLPN** - Used when you want to specify the health plan. • **PER** - Used when you want to specify the person. • **PIDT** - Used when you want to specify the person identifier type. • **PIDV** - Used when you want to specify the person identifier value. • **PLAN** - Used when you want to specify the plan. • **PLCY** - Used when you want to specify the policy. • **SSYS** - Used when you want to specify the source system. • **STAT** - Used when you want to specify the state. **Note:** You must specify a value which is already defined in the **PRC_RULE_ENTITY_TYPE** lookup field. It must be in the **Active** status.	Yes (Conditional) **Note:** This data is required while defining or editing a pricing rule.
entityIdentifierValue	Used to specify the entity identifier (i.e. plan number, policy number, or source system).	Yes (Conditional)

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Tag Name	Tag Description	Mandatory (Yes or No)
		Note: This data is required while defining or editing a pricing rule.
status	Used to indicate the status of the pricing rule. The valid values are: • ACTV • INAC **Note:** If you do not specify the value, by default, it is set to **Active**.	No
pricingRuleType	Used to indicate the pricing rule type using which you want to define the pricing rule. **Note:** You must specify a pricing rule type where the category is set to **Age Based** or **Tier Based**.	Yes (Conditional) **Note:** This data is required while defining or editing a pricing rule.
priceItemCd	Used to indicate the price item for which you want to define the pricing rule. **Note:** You must specify a price item which is already associated with the respective pricing rule type.	Yes (Conditional) **Note:** This data is required while defining or editing a pricing rule.
rateOption	Used to indicate the rate option using which you want to create price assignment for the pricing rule. **Note:** You must specify a rate option which is already defined in the **C1-ExtLookRetTypeRateOpt** extendable lookup. It must be in the **Active** status. If the rate option is not given for an age-based pricing rule, by default, it is set to: • The value specified in the **Default Rate Option - Flat** option type of the **C1-ASOBLLNG** feature configuration when the modifier method is set to **FLAT** • The value specified in the **Default Rate Option - Percentage** option type of the **C1-ASOBLLNG** feature configuration when the modifier method is set to **EXPT** or **INPT** However, if the rate option is not given for a tier-based pricing rule, by default, it is set to a value specified in the **Default Rate Option - Flat** option type of the **C1-ASOBLLNG** feature configuration when the modifier method is set to **FLAT** or **NULL**.	No
pricingType	Used to indicate the type of pricing defined for the pricing rule. The valid values are: • **FLAT** • **PCNT**	Yes

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Tag Name	Tag Description	Mandatory (Yes or No)
	Note: You must specify a value which is already defined in the **PRC_TYPE_FLG** lookup field. It must be in the **Active** status.	
modifierApplicability	Used to indicate whether you want to increase or decrease the premium of an eligible member based on certain modifiers (i.e. parameters, such as tobacco usage, alcohol usage, and so on). The valid values are: • Y • N **Note:** If you do not specify the value, by default, it is set to **N**.	No
modifierMethod	Used to indicate whether the system should consider the modifier rate as a flat amount or percentage. The valid values are: • **EXPT** - Indicates that the system should consider the modifier rate as exclusive percentage. • **FLAT** - Indicates that the system should consider the modifier rate as a flat amount. • **INPT** - Indicates that the system should consider the modifier rate as inclusive percentage. **Note:** You must specify a value which is already defined in the **HC_MODIFIER_METHOD** lookup field. It must be in the **Active** status.	Yes (Conditional) **Note:** This data is required when the **modifierApplicability** tag contains **Y**.
baseRate	Used to specify the base fees for employees with a particular set of attributes. You can define different base fees for employees with different set of attributes. **Note:** While creating a price assignment for the pricing rule, the system creates one price component for each given set of base rate information.	Yes (Conditional) **Note:** This data is required while defining a pricing rule.
baseFee	Used to specify the base fees for the eligible members.	Yes (Conditional) **Note:** This data is required while defining a pricing rule.
lowerAgeLimit	Used to specify the lower age limit. It is used to define lower age limit pricing eligibility criteria in the price component. **Note:** The system defines the lower age limit pricing eligibility criteria using the parameter which is specified in the **Age Based Parameter** option type of the **C1-ASOBLLNG** feature configuration. This data is ignored when given in a tier-based pricing rule information.	Yes (Conditional) **Note:** This data is required while defining an age-based pricing rule.

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Tag Name	Tag Description	Mandatory (Yes or No)
upperAgeLimit	Used to specify the upper age limit. It is used to define upper age limit pricing eligibility criteria in the price component. **Note:** The system defines the upper age limit pricing eligibility criteria using the parameter which is specified in the **Age Based Parameter** option type of the **C1-ASOBLLNG** feature configuration. This data is ignored when given in a tier-based pricing rule information.	Yes (Conditional) **Note:** This data is required while defining an age-based pricing rule.
pricingParameter	Used to specify a set of employee attributes based on which the base fees may vary.	Yes (Conditional) **Note:** This data is required while defining a tier-based pricing rule.
parameterCode	You can use this tag within the following tags: • **pricingParameter** - Here, the **parameterCode** tag is used to specify the employee attribute (i.e. parameter, such as employee status, employee location, and so on) using which you want to define the pricing eligibility criteria. • **modifierInformation** - Here, the **parameterCode** tag is used to specify the modifier (i.e. parameter, such as tobacco usage, alcohol usage, and so on) using which you want to define the pricing eligibility criteria. **Note:** You must define the employee attributes and modifiers as parameters in the system. Note that you must set the parameter usage for these parameters to **Pricing Eligibility Criteria**. The system creates an pricing eligibility criteria for each parameter and/or modifier specified in the pricing rule information. You cannot specify any special character except underscore (_) in the parameter name.	Yes (Conditional) **Note:** This data is required while specifying the respective information.
parameterValue	You can use this tag within the following tags: • **pricingParameter** - Here, the **parameterValue** tag is used to specify the value for the parameter (i.e. employee attribute). • **modifierInformation** - Here, the **parameterValue** tag is used to specify the value for the parameter (i.e. modifier). **Note:** You can specify any special characters except ampersand (&), comma (,), underscore (_), equal to (=), tilde (~), and semi-colon(;) in the parameter value.	Yes (Conditional) **Note:** This data is required while specifying the respective information.

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Tag Name	Tag Description	Mandatory (Yes or No)
modifierInformation	Used to specify the modifier based on which you want to increase or decrease the base fees. **Note:** While creating a price assignment for the pricing rule, the system creates one price component for each given set of modifier information and then links these modifier price components with the respective base rate price component.	Yes (Conditional) **Note:** This data is required while specifying the modifier information.
rate	Used to specify the flat amount or percentage by which you want to increase or decrease the premium of an eligible member.	Yes (Conditional) **Note:** This data is required while specifying the modifier information.
statementConstructsData	Used to specify the details of the statement construct. **Note:** This tag and all the tags within this parent tag are applicable only for the **Fully-Insured Group Health Insurance** and **Individual Health Insurance** businesses.	Yes (Conditional) **Note:** This data is required while defining or editing a statement construct.
personStatementConstructs	Used to specify the details of a person for whom the statement construct is created.	Yes (Conditional) **Note:** This data is required while defining or editing a statement construct.
personIdentifier	Used to specify the person with the statement construct.	Yes (Conditional) **Note:** This data is required while defining or editing a statement construct.
personIdentifierType	Used to specify the person identifier type associated with the statement construct.	Yes (Conditional) **Note:** This data is required while defining or editing a statement construct.
statementConstructIdentifier	Used to specify the statement construct identifier defined for the statement construct.	Yes (Conditional) **Note:** This data is required while defining or editing a statement construct.
statementAddressSource	Used to indicate the source whose address should be used for sending the statements to the person. The valid value is: • **PER**	Yes (Conditional)

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Tag Name	Tag Description	Mandatory (Yes or No)
	Note: You must specify a value which is already defined in the **STM_ADDR_SRC_FLG** lookup field. It must be in the **Active** status.	**Note:** This data is required while defining or editing a statement construct.
statementCycle	Used to indicate the statement construct cycle for a person.	Yes (Conditional) **Note:** This data is required while defining or editing a statement construct.
statementRouteType	Used to indicate how to route the statements to the person.	Yes (Conditional) **Note:** This data is required while defining or editing a statement construct.
effectiveStatus	Used to indicate the status of the statement construct. The valid values are: • **A** - Indicates the status of the statement construct is in active state. • **I** - Indicates the status of the statement construct is in inactive state. **Note:** You must specify a value which is already defined in the **EFF_STATUS** lookup field. It must be in the **Active** status.	Yes (Conditional) **Note:** This data is required while defining or editing a statement construct.
addressId	Used to specify the address to which the statement should be sent.	Yes (Conditional) **Note:** This data is required while defining or editing a statement construct.
numberOfCopies	Used to specify the number of copies of the statement construct you want the person to receive.	Yes (Conditional) **Note:** This data is required while defining or editing a statement construct.
statementFormat	Used to indicate the format of the statement construct. The valid values are: • **D** - Indicates that the statement construct is in detail format. • **S**Indicates that the statement construct is in summary format. **Note:** You must specify a value which is already defined in the **STM_FORMAT_FLG** lookup field. It must be in the **Active** status.	Yes (Conditional) **Note:** This data is required while defining or editing a statement construct.

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Tag Name	Tag Description	Mandatory (Yes or No)
description	Used to specify the description of the statement construct.	Yes (Conditional) **Note:** This data is required while defining or editing a statement construct.
statementConstructDetails	Used to specify the statement construct details.	Yes (Conditional) **Note:** This data is required while specifying the statement construct information.
serviceAgreement	Used to specify the statement construct contract.	Yes
accountNumber	Used to specify the value for the account identifier type of the payee. **Note:** You must specify the account number which is already defined in the system.	Yes (Conditional) **Note:** This data is required while specifying the statement construct information.
accountNumberTypeCd	Used to specify the account identifier type of the payee.	Yes (Conditional) **Note:** This data is required while specifying the statement construct information.
statementPrintDescription	Used to specify the description of the construct detail associated with the contract.	Yes (Conditional) **Note:** This data is required while specifying the statement construct information.
printOrder	Used to specify the financial transactions associated with the account / contract to appear on the printed statement.	Yes (Conditional) **Note:** This data is required while specifying the statement construct information.
repriceAfterDate	Used to specify whether you want to hold the repricing for the membership until the specified date.	No

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Tag Name	Tag Description	Mandatory (Yes or No)
	Note: This tag is applicable only for the **Individual Health Insurance** business.	
paidThroughDate	Used to specify the term end date of the last fully or partially paid term. For more information about the paid through date, refer to Policy on page 247. **Note:** This tag is applicable only for the **Fully-Insured Group Health Insurance** and **Individual Health Insurance** businesses.	No
status	Used to specify status of the policy. The valid values are: • Pending • Activate • In Force/Active • Pending Termination • Terminated • Pending Reinstatement • Reinstated • Renewed • Cancel **Note:** You must specify the status code which is already defined in the lifecycle of the **C1-POLICY** business object.	
statusReason	Used to specify the reason why the status of the policy is changed. **Note:** You must specify a reason which is already defined for the **Cancel** status of the **C1-POLICY** business object.	
memoOnlySponsorCharge	Used to indicate whether the charge should be included in the bill amount or not. The valid values are: • Y • N	
isCMSAccountSw	Used to specify the CMS account that has offered the membership benefit.The valid values are	

The following table lists and describes the tags which are available in the health care inbound message schema, but should not be included in the XML file:

Tag Name	Tag Description
c1InboundMessage	Displays the inbound message ID.
boStatus	Displays the status of the health care inbound message.
statusReason	Indicates the reason why the status of the health care inbound message is changed.
person	At present, this tag is not supported in a health care inbound message.
statusDateTime	Displays the date and time when the status of the health care inbound message is changed in the system.

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<table>
<tr><th>Tag Name</th><th>Tag Description</th></tr>
<tr><td>creationDateTime</td><td>Displays the date and time when the health care inbound message is created in the system.</td></tr>
<tr><td>searchCharacteristicValue</td><td>At present, this tag is not supported in a health care inbound message.</td></tr>
<tr><td>version</td><td>This tag appears within the following parent tags:
<table>
<tr><th>Parent Tag</th><th>Then the purpose of the version tag is...</th></tr>
<tr><td>schema</td><td>Displays the version of the health care inbound message.</td></tr>
<tr><td>inboundMessageCharacteristic</td><td>Displays the version of the characteristic defined for the health care inbound message.</td></tr>
</table></td></tr>
<tr><td>toDoRetry</td><td>Displays the information about the retry option used for the health care inbound message.

Note: This information appears at the bottom of the inbound message in the Inbound Message Content zone once the health care inbound message is validated and processed either through the user interface or batch process.</td></tr>
<tr><td>retryDateTime</td><td>Displays the date and time when the retry option is used to change the status of the health care inbound message from Rejected to Pending.</td></tr>
<tr><td>numberOfRetries</td><td>Indicates the number of times the retry option is used for the health care inbound message.</td></tr>
<tr><td>currentErrorState</td><td>Indicates the status to which the health care inbound message is transitioned when its validation or processing fails. The valid value is:
• REJECTED</td></tr>
<tr><td>isRetried</td><td>Indicates whether the retry option is used to change the status of the health care inbound message. The valid values are:
• true
• false</td></tr>
</table>

Related Topics

For more information on...	See...
Health Care Inbound Message Schema	Health Care Inbound Message Schema on page 2339
Sample Health Care Inbound Message for Fully-Insured Group Customer Setup	Sample Health Care Inbound Message for Fully-Insured Group Customer Setup on page 2347
Sample Health Care Inbound Message for Membership	Sample Health Care Inbound Message for Group Membership (Without Benefit) on page 2439
Sample Health Care Inbound Message for Pricing Rules	Sample Health Care Inbound Message for Pricing Rules on page 2420
Sample Health Care Inbound Message for Self-Funded Customer Setup	Sample Health Care Inbound Message for Self-Funded Customer Setup on page 2392

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For more information on...	See...
How to setup the **C1-ASOBLLNG** feature configuration	Setting the C1-ASOBLLNG Feature Configuration on page 4417

Health Care Inbound Message Schema

The following code snippet illustrates how the tags are nested in the health care inbound message schema:

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Sample Health Care Inbound Message for Fully-Insured Group Customer Setup

Using the below example, you can do the following:

- Create the parent customer and bill groups for a fully-insured group health insurance business
- Create policies where the policy category is set to **Fully-Insured Group**
- Create various medical and dental plans for active and retired employees in the fully-insured group policies
- Associate a pricing rule type with the policy plans

The following table provides sample data for a fully-insured group customer that you can process through a health care inbound message:

Person Name	Person Type	Account	Policy	Policy Plan	Pricing Rule Type
Antartica Petroleum Corp	Parent Customer	-	Active Employee Medical Health Insurance Policy	HMO Medical Bronze 60 AE	AGE_BASED
				HMO Medical Silver 70 AE	AGE_BASED
				HMO Medical Gold 80 AE	AGE_BASED
				HMO Medical Platinum 90 AE	AGE_BASED
				PPO Medical Bronze 60 AE	AGE_BASED
				PPO Medical Silver 70 AE	AGE_BASED
				PPO Medical Gold 80 AE	AGE_BASED
				PPO Medical Platinum 90 AE	AGE_BASED
			Active Employee Dental Health Insurance Policy	DD BASIC PLAN AE	TIER_BASED
				DD STANDARD PLAN AE	TIER_BASED
			Retiree Employee Health Insurance Policy	HMO Medical Bronze 60 RE	AGE_BASED

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Person Name	Person Type	Account	Policy	Policy Plan	Pricing Rule Type
				HMO Medical Silver 70 RE	AGE_BASED
				PPO Medical Bronze 60 RE	AGE_BASED
				PPO Medical Silver 70 RE	AGE_BASED
				DD BASIC RE	TIER_BASED
Antartica Petroleum ACTIVE	Bill Group	CMS	-	-	-
		CMR			
Antartica Petroleum COBRA	Bill Group	CMS	-	-	-
		CMR			
Antartica Petroleum RETIREE	Bill Group	CMS	Employee Medicare Policy	APE Medicare Bronze RE MALE	AGE_BASED
		CMR		APE Medicare Silver RE MALE	AGE_BASED
				APE Medicare Gold RE MALE	AGE_BASED
				APE Medicare Bronze RE FEMALE	AGE_BASED
				APE Medicare Silver RE FEMALE	AGE_BASED
				APE Medicare Gold RE FEMALE	AGE_BASED

In addition, the following table provides sample derivation and pricing parameters for multiple bill groups:

Bill Group	Source System	Parameter 1	Parameter 2	Parameter 3	Parameter 4
Antartica Petroleum ACTIVE	SMALLPRIME	ACTIVE	SEATTLE	MEDICAL	HMO
	SMALLPRIME	ACTIVE	SEATTLE	MEDICAL	PPO
	SMALLPRIME	ACTIVE	SEATTLE	DENTAL	HMO
	SMALLPRIME	ACTIVE	SEATTLE	DENTAL	PPO
	SMALLPRIME	ACTIVE	SAN FRANCISCO	MEDICAL	HMO
	SMALLPRIME	ACTIVE	SAN FRANCISCO	MEDICAL	PPO
	SMALLPRIME	ACTIVE	SAN FRANCISCO	DENTAL	HMO

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Bill Group	Source System	Parameter 1	Parameter 2	Parameter 3	Parameter 4
	SMALLPRIME	ACTIVE	SAN FRANCISCO	DENTAL	PPO
	SMALLPRIME	ACTIVE	LOS ANGELES	MEDICAL	HMO
	SMALLPRIME	ACTIVE	LOS ANGELES	MEDICAL	PPO
	SMALLPRIME	ACTIVE	LOS ANGELES	DENTAL	HMO
	SMALLPRIME	ACTIVE	LOS ANGELES	DENTAL	PPO
Antartica Petroleum COBRA	SMALLPRIME	COBRA	SEATTLE	MEDICAL	HMO
	SMALLPRIME	COBRA	SEATTLE	MEDICAL	PPO
	SMALLPRIME	COBRA	SEATTLE	DENTAL	HMO
	SMALLPRIME	COBRA	SEATTLE	DENTAL	PPO
	SMALLPRIME	COBRA	SAN FRANCISCO	MEDICAL	HMO
	SMALLPRIME	COBRA	SAN FRANCISCO	MEDICAL	PPO
	SMALLPRIME	COBRA	SAN FRANCISCO	DENTAL	HMO
	SMALLPRIME	COBRA	SAN FRANCISCO	DENTAL	PPO
	SMALLPRIME	COBRA	LOS ANGELES	MEDICAL	HMO
	SMALLPRIME	COBRA	LOS ANGELES	MEDICAL	PPO
	SMALLPRIME	COBRA	LOS ANGELES	DENTAL	HMO
	SMALLPRIME	COBRA	LOS ANGELES	DENTAL	PPO
Antartica Petroleum RETIREE	SMALLPRIME	RETIRED	SEATTLE	MEDICAL	HMO
	SMALLPRIME	RETIRED	SEATTLE	MEDICAL	PPO
	SMALLPRIME	RETIRED	SEATTLE	DENTAL	HMO
	SMALLPRIME	RETIRED	SEATTLE	DENTAL	PPO
	SMALLPRIME	RETIRED	SAN FRANCISCO	MEDICAL	HMO
	SMALLPRIME	RETIRED	SAN FRANCISCO	MEDICAL	PPO
	SMALLPRIME	RETIRED	SAN FRANCISCO	DENTAL	HMO
	SMALLPRIME	RETIRED	SAN FRANCISCO	DENTAL	PPO
	SMALLPRIME	RETIRED	LOS ANGELES	MEDICAL	HMO
	SMALLPRIME	RETIRED	LOS ANGELES	MEDICAL	PPO
	SMALLPRIME	RETIRED	LOS ANGELES	DENTAL	HMO

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Bill Group	Source System	Parameter 1	Parameter 2	Parameter 3	Parameter 4
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Note: We have given the above sample to illustrate how the tags should be nested while sending an inbound message from the external system. However, you should not seamlessly use this sample in your environment because the required pre-requisite data may not be available in your environment. In such case, the system will give erroneous results.

Sample Health Care Inbound Message for Self-Funded Customer Setup

Using the below example, you can do the following:

- Create the parent customer and bill groups for a self-funded health insurance business
- Create the accounts for the bill groups
- Create the policies for the bill groups where the policy category is set to **Self-Funded**

The following table provides sample data for a self-funded customer that you can process through a health care inbound message:

Person Name	**Person Type**	**Policy**	**Account**
US Energy Corp	Parent Customer	-	-
US Energy ACTIVE	Bill Group	Active Employee Health Insurance Policy	Standard
			Retention
US Energy COBRA	Bill Group	Active COBRA Employe Health Insurance Policy	Standard
		Retiree COBRA Employee Health Insurance Policy	Retention
US Energy RETIREE	Bill Group	Retiree Employee Health Insurance Policy	Standard
			Retention

In addition, the following table provides sample derivation and pricing parameters for multiple bill groups:

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Bill Group	Source System	Parameter 1	Parameter 2	Parameter 3	Parameter 4
US Energy ACTIVE	SMALLPRIME	ACTIVE	SEATTLE	-	-
	SMALLPRIME	ACTIVE	LOS ANGELES	-	-
US Energy COBRA	SMALLPRIME	COBRA	DALLAS	-	-
	SMALLPRIME	COBRA	SAN JOSE	-	-
US Energy RETIREE	SMALLPRIME	RETIRED	CHARLOTTE	-	-
	SMALLPRIME	RETIRED	DETROIT	-	-

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Note: We have given the above sample to illustrate how the tags should be nested while sending an inbound message from the external system. However, you should not seamlessly use this sample in your environment because the required pre-requisite data may not be available in your environment. In such case, the system will give erroneous results.

Sample Health Care Inbound Message for Pricing Rules

Using the below example, you can create the following:

- Tier-based pricing rule for the **DD_BASIC** policy plan -
  The following table provides sample data for a tier-based pricing rule of the policy plan:

Policy Plan	Pricing Rule Type	Base Rate	Parameter	Parameter Value
DD_BASIC	TIER_BASED	20	EMPBAND	IC1
			SUBSCRIPTIONTIER	E
			GENDER	MALE
		40	EMPBAND	IC2
			SUBSCRIPTIONTIER	ES
			GENDER	FEMALE
		60	EMPBAND	IC3
			SUBSCRIPTIONTIER	ES
			GENDER	FEMALE
		80	EMPBAND	IC4
			SUBSCRIPTIONTIER	E
			GENDER	MALE

- Age-based pricing rule for the **PPO_MED_BRONZE_RETIRED** policy plan -
  The following table provides sample data for an age-based pricing rule of the policy plan:

Policy Plan	Pricing Rule Type	Base Rate	Lower Age Limit	Upper Age Limit	Parameter	Parameter Value	Modifier	Modifier Value	Modifier Rate
PPO_MED_	AGE_	200	0	19	GENDER	FEMALE	TOBUSE	Y	20
BRONZE_	BASED	200	0	19	GENDER	MALE	TOBUSE	Y	20

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Policy Plan	Pricing Rule Type	Base Rate	Lower Age Limit	Upper Age Limit	Parameter	Parameter Value	Modifier	Modifier Value	Modifier Rate
RETIRED		300	20	39	GENDER	FEMALE	TOBUSE	Y	30
		300	20	39	GENDER	MALE	TOBUSE	Y	30
		450	40	59	GENDER	FEMALE	TOBUSE	Y	40
		450	40	59	GENDER	MALE	TOBUSE	Y	40
		550	60	130	GENDER	FEMALE	TOBUSE	Y	50
		550	60	130	GENDER	MALE	TOBUSE	Y	50

- Additional fee pricing rule for the **COBRA_DENTAL** policy plan -
  The following table provides sample data for an additional fee pricing rule of the policy plan:

Policy Plan	Pricing Rule Type	Base Rate	Modifier	Modifier Value	Modifier Rate
COBRA_DENTAL	CAPITATION_FEES	100	IC_BAND	IC1	10
		200	M1_BAND	M1	20
		300	M2_BAND	M2	30
		400	M3_BAND	M3	40

- Rate Guarantee pricing rule for the **RATE_LOCK_MED** policy plan -
  The following table provides sample data for a rate guarantee pricing rule of the policy plan:

Policy Plan	Pricing Rule Type	Base Rate	Lower Age Limit	Upper Age Limit	Start Date	End Date	Rate Guarantee
RATE_ LOCK_ MED	AGE_BASED	200	20	39	01-01-2021	31-03-2021	Y
	TIER_BASED	400	40	59	01-02-2021	31-07-2021	Y
	TIER_BASED	600	60	79	01-02-2021	31-10-2021	Y
	AGE_BASED	800	80	99	01-01-2021	30-11-2021	Y

- Discount charge pricing rule for the **DISC_CHG_MED** policy plan -
  The following table provides sample data for a discount charge pricing rule of the policy plan:

Bill Group	Policy Plan	Pricing Rule Type	Base Fee	Modifier	Modifier Value	Modifier Rate
United Antarctica Group	DISC_ CHG_ MED	DISCOUNT_ CHARGE	50	VP_BAND	VP1	10
			70	M_BAND	M1	20
			90	IC_BAND	IC1	30

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Note: We have given the above sample to illustrate how the tags should be nested while sending an inbound message from the external system. However, you should not seamlessly use this sample in your environment because the required pre-requisite data may not be available in your environment. In such case, the system will give erroneous results.

Sample Health Care Inbound Message for Group Membership (Without Benefit)

Using the below example, you can do the following:

- Create the persons who are neither parent customer nor bill group
- Create a membership where the person is the main subscriber
- Add persons in a membership

Person Name	Person Type	Policy	Policy Plan	Main Subscriber	Member Relationship Type
G, ALLEN	Person	AP234389	HMO_MED_ SILVER_RETIRED	Yes	SELF
G, JOHN	Person	AP234389	HMO_MED_ SILVER_RETIRED	No	SPOUSE
G, HARRY	Person	AP234389	HMO_MED_ SILVER_RETIRED	No	SON
G, NELSON	Person	AP234389	HMO_MED_ SILVER_RETIRED	No	SON
G, PARKER	Person	AP234389	HMO_MED_ SILVER_RETIRED	No	SON
G, RUSSEL	Person	AP234389	HMO_MED_ SILVER_RETIRED	No	SON
G, LINDA	Person	AP234389	HMO_MED_ SILVER_RETIRED	No	DAUGHTER

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Note: We have given the above sample to illustrate how the tags should be nested while sending an inbound message from the external system. However, you should not seamlessly use this sample in your environment because the required pre-requisite data may not be available in your environment. In such case, the system will give erroneous results.

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Sample Health Care Inbound Message for Individual Membership (With Benefit)

Using the below example, you can do the following:

- Create individual membership where the person is the main subscriber and contains dependent persons.
- Enroll the main subscriber to a health plan
- Provide information regarding benefit type, binder payment, rate guarantee, exchange details, etc.

Person Name	Member Relationship Type	Main Subscriber	Health Plan Code	Binder Payment	Benefit Type	Exchange ID
GEOFF, JOHNSON	SELF	Yes	HMCSP01	Yes	MA	ABHF_121_FL
GWYNETH, JOHNSON	SPOUSE	No	HMCSP01	Yes	MA	ABHF_121_FL

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Note: We have given the above sample to illustrate how the tags should be nested while sending an inbound message from the external system. However, you should not seamlessly use this sample in your environment because the required pre-requisite data may not be available in your environment. In such case, the system will give erroneous results.

Sample Health Care Inbound Message for Group Membership (With Benefit)

Using the below example, you can do the following:

- Create group membership where the person is the main subscriber and contains dependent persons.

Person Name	Member Relationship Type	Main Subscriber	Policy	Policy Plan	Benefit Type
TREVOR, WALSH	SELF	Yes	AP234389	HMO_MED_ SILVER_RETIRED	MA
LETECIA, WALSH	SPOUSE	No	AP234389	HMO_MED_ SILVER_RETIRED	MA
MIKE, WALSH	SON	No	AP234389	HMO_MED_ SILVER_RETIRED	MA

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Note: We have given the above sample to illustrate how the tags should be nested while sending an inbound message from the external system. However, you should not seamlessly use this sample in your environment because the required pre-requisite data may not be available in your environment. In such case, the system will give erroneous results.

Sample Health Care Inbound Message for Advance Deposit at Parent Customer Level

Using the below example, you can do the following:

- Create the parent customer and bill groups for a fully-insured group business
- Create policies where the policy category is set to **Fully-Insured Group**
- Create various medical and dental plans for active and retired employees in the fully-insured group policies
- Associate a pricing rule type with the policy plans
- Maintain the advance deposit details at the parent customer level

The following table provides sample data for a fully-insured group customer that you can process through a health care inbound message:

Person Name	Person Type	Account	Policy	Policy Plan	Pricing Rule Type
Antartica Petroleum Corp	Parent Customer	-	Active Employee Medical Health Insurance Policy	HMO Medical Bronze 60 AE	AGE_BASED
				HMO Medical Silver 70 AE	AGE_BASED
				HMO Medical Gold 80 AE	AGE_BASED
				HMO Medical Platinum 90 AE	AGE_BASED
				PPO Medical Bronze 60 AE	AGE_BASED
				PPO Medical Silver 70 AE	AGE_BASED
				PPO Medical Gold 80 AE	AGE_BASED
				PPO Medical Platinum 90 AE	AGE_BASED
			Active Employee Dental Health Insurance Policy	DD BASIC PLAN AE	TIER_BASED
				DD STANDARD PLAN AE	TIER_BASED
			Retiree Employee Health Insurance Policy	HMO Medical Bronze 60 RE	AGE_BASED
				HMO Medical Silver 70 RE	AGE_BASED
				PPO Medical Bronze 60 RE	AGE_BASED

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Person Name	Person Type	Account	Policy	Policy Plan	Pricing Rule Type
				PPO Medical Silver 70 RE	AGE_BASED
				DD BASIC RE	TIER_BASED
Antartica Petroleum ACTIVE	Bill Group	CMS	-	-	-
		CMR			
Antartica Petroleum COBRA	Bill Group	CMS	-	-	-
		CMR			
Antartica Petroleum RETIREE	Bill Group	CMS	Employee Medicare Policy	APE Medicare Bronze RE MALE	AGE_BASED
		CMR		APE Medicare Silver RE MALE	AGE_BASED
				APE Medicare Gold RE MALE	AGE_BASED
				APE Medicare Bronze RE FEMALE	AGE_BASED
				APE Medicare Silver RE FEMALE	AGE_BASED
				APE Medicare Gold RE FEMALE	AGE_BASED

In addition, the following table provides sample derivation and pricing parameters for multiple bill groups:

Bill Group	Source System	Parameter 1	Parameter 2	Parameter 3	Parameter 4
Antartica Petroleum ACTIVE	SMALLPRIME	ACTIVE	SEATTLE	MEDICAL	HMO
	SMALLPRIME	ACTIVE	SEATTLE	MEDICAL	PPO
	SMALLPRIME	ACTIVE	SEATTLE	DENTAL	HMO
	SMALLPRIME	ACTIVE	SEATTLE	DENTAL	PPO
	SMALLPRIME	ACTIVE	SAN FRANCISCO	MEDICAL	HMO
	SMALLPRIME	ACTIVE	SAN FRANCISCO	MEDICAL	PPO
	SMALLPRIME	ACTIVE	SAN FRANCISCO	DENTAL	HMO
	SMALLPRIME	ACTIVE	SAN FRANCISCO	DENTAL	PPO
	SMALLPRIME	ACTIVE	LOS ANGELES	MEDICAL	HMO

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Bill Group	Source System	Parameter 1	Parameter 2	Parameter 3	Parameter 4
	SMALLPRIME	ACTIVE	LOS ANGELES	MEDICAL	PPO
	SMALLPRIME	ACTIVE	LOS ANGELES	DENTAL	HMO
	SMALLPRIME	ACTIVE	LOS ANGELES	DENTAL	PPO
Antartica Petroleum COBRA	SMALLPRIME	COBRA	SEATTLE	MEDICAL	HMO
	SMALLPRIME	COBRA	SEATTLE	MEDICAL	PPO
	SMALLPRIME	COBRA	SEATTLE	DENTAL	HMO
	SMALLPRIME	COBRA	SEATTLE	DENTAL	PPO
	SMALLPRIME	COBRA	SAN FRANCISCO	MEDICAL	HMO
	SMALLPRIME	COBRA	SAN FRANCISCO	MEDICAL	PPO
	SMALLPRIME	COBRA	SAN FRANCISCO	DENTAL	HMO
	SMALLPRIME	COBRA	SAN FRANCISCO	DENTAL	PPO
	SMALLPRIME	COBRA	LOS ANGELES	MEDICAL	HMO
	SMALLPRIME	COBRA	LOS ANGELES	MEDICAL	PPO
	SMALLPRIME	COBRA	LOS ANGELES	DENTAL	HMO
	SMALLPRIME	COBRA	LOS ANGELES	DENTAL	PPO
Antartica Petroleum RETIREE	SMALLPRIME	RETIRED	SEATTLE	MEDICAL	HMO
	SMALLPRIME	RETIRED	SEATTLE	MEDICAL	PPO
	SMALLPRIME	RETIRED	SEATTLE	DENTAL	HMO
	SMALLPRIME	RETIRED	SEATTLE	DENTAL	PPO
	SMALLPRIME	RETIRED	SAN FRANCISCO	MEDICAL	HMO
	SMALLPRIME	RETIRED	SAN FRANCISCO	MEDICAL	PPO
	SMALLPRIME	RETIRED	SAN FRANCISCO	DENTAL	HMO
	SMALLPRIME	RETIRED	SAN FRANCISCO	DENTAL	PPO
	SMALLPRIME	RETIRED	LOS ANGELES	MEDICAL	HMO
	SMALLPRIME	RETIRED	LOS ANGELES	MEDICAL	PPO
	SMALLPRIME	RETIRED	LOS ANGELES	DENTAL	HMO
	SMALLPRIME	RETIRED	LOS ANGELES	DENTAL	PPO

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Note: We have given the above sample to illustrate how the tags should be nested while sending an inbound message from the external system. However, you should not seamlessly use this sample in your environment because the required pre-requisite data may not be available in your environment. In such case, the system will give erroneous results.

Sample Health Care Inbound Message for Advance Deposit at Policy Level

Using the below example, you can do the following:

- Create the parent customer and bill groups for a fully-insured group business
- Create policies where the policy category is set to **Fully-Insured Group**
- Create various medical and dental plans for active and retired employees in the fully-insured group policies
- Associate a pricing rule type with the policy plans
- Maintain the advance deposit details at the policy level

The following table provides sample data for a fully-insured group customer that you can process through a health care inbound message:

Person Name	Person Type	Account	Policy	Policy Plan	Pricing Rule Type
Antartica Petroleum Corp	Parent Customer	-	Active Employee Medical Health Insurance Policy	HMO Medical Bronze 60 AE	AGE_BASED
				HMO Medical Silver 70 AE	AGE_BASED
				HMO Medical Gold 80 AE	AGE_BASED
				HMO Medical Platinum 90 AE	AGE_BASED
				PPO Medical Bronze 60 AE	AGE_BASED
				PPO Medical Silver 70 AE	AGE_BASED
				PPO Medical Gold 80 AE	AGE_BASED

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Person Name	Person Type	Account	Policy	Policy Plan	Pricing Rule Type
				PPO Medical Platinum 90 AE	AGE_BASED
			Active Employee Dental Health Insurance Policy	DD BASIC PLAN AE	TIER_BASED
				DD STANDARD PLAN AE	TIER_BASED
			Retiree Employee Health Insurance Policy	HMO Medical Bronze 60 RE	AGE_BASED
				HMO Medical Silver 70 RE	AGE_BASED
				PPO Medical Bronze 60 RE	AGE_BASED
				PPO Medical Silver 70 RE	AGE_BASED
				DD BASIC RE	TIER_BASED
Antartica Petroleum ACTIVE	Bill Group	CMS	-	-	-
		CMR			
Antartica Petroleum COBRA	Bill Group	CMS	-	-	-
		CMR			
Antartica Petroleum RETIREE	Bill Group	CMS	Employee Medicare Policy	APE Medicare Bronze RE MALE	AGE_BASED
		CMR		APE Medicare Silver RE MALE	AGE_BASED
				APE Medicare Gold RE MALE	AGE_BASED
				APE Medicare Bronze RE FEMALE	AGE_BASED
				APE Medicare Silver RE FEMALE	AGE_BASED
				APE Medicare Gold RE FEMALE	AGE_BASED

In addition, the following table provides sample derivation and pricing parameters for multiple bill groups:

Bill Group	Source System	Parameter 1	Parameter 2	Parameter 3	Parameter 4
Antartica Petroleum ACTIVE	SMALLPRIME	ACTIVE	SEATTLE	MEDICAL	HMO
	SMALLPRIME	ACTIVE	SEATTLE	MEDICAL	PPO

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Bill Group	Source System	Parameter 1	Parameter 2	Parameter 3	Parameter 4
	SMALLPRIME	ACTIVE	SEATTLE	DENTAL	HMO
	SMALLPRIME	ACTIVE	SEATTLE	DENTAL	PPO
	SMALLPRIME	ACTIVE	SAN FRANCISCO	MEDICAL	HMO
	SMALLPRIME	ACTIVE	SAN FRANCISCO	MEDICAL	PPO
	SMALLPRIME	ACTIVE	SAN FRANCISCO	DENTAL	HMO
	SMALLPRIME	ACTIVE	SAN FRANCISCO	DENTAL	PPO
	SMALLPRIME	ACTIVE	LOS ANGELES	MEDICAL	HMO
	SMALLPRIME	ACTIVE	LOS ANGELES	MEDICAL	PPO
	SMALLPRIME	ACTIVE	LOS ANGELES	DENTAL	HMO
	SMALLPRIME	ACTIVE	LOS ANGELES	DENTAL	PPO
Antartica Petroleum COBRA	SMALLPRIME	COBRA	SEATTLE	MEDICAL	HMO
	SMALLPRIME	COBRA	SEATTLE	MEDICAL	PPO
	SMALLPRIME	COBRA	SEATTLE	DENTAL	HMO
	SMALLPRIME	COBRA	SEATTLE	DENTAL	PPO
	SMALLPRIME	COBRA	SAN FRANCISCO	MEDICAL	HMO
	SMALLPRIME	COBRA	SAN FRANCISCO	MEDICAL	PPO
	SMALLPRIME	COBRA	SAN FRANCISCO	DENTAL	HMO
	SMALLPRIME	COBRA	SAN FRANCISCO	DENTAL	PPO
	SMALLPRIME	COBRA	LOS ANGELES	MEDICAL	HMO
	SMALLPRIME	COBRA	LOS ANGELES	MEDICAL	PPO
	SMALLPRIME	COBRA	LOS ANGELES	DENTAL	HMO
	SMALLPRIME	COBRA	LOS ANGELES	DENTAL	PPO
Antartica Petroleum RETIREE	SMALLPRIME	RETIRED	SEATTLE	MEDICAL	HMO
	SMALLPRIME	RETIRED	SEATTLE	MEDICAL	PPO
	SMALLPRIME	RETIRED	SEATTLE	DENTAL	HMO
	SMALLPRIME	RETIRED	SEATTLE	DENTAL	PPO
	SMALLPRIME	RETIRED	SAN FRANCISCO	MEDICAL	HMO
	SMALLPRIME	RETIRED	SAN FRANCISCO	MEDICAL	PPO

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Bill Group	Source System	Parameter 1	Parameter 2	Parameter 3	Parameter 4
	SMALLPRIME	RETIRED	SAN FRANCISCO	DENTAL	HMO
	SMALLPRIME	RETIRED	SAN FRANCISCO	DENTAL	PPO
	SMALLPRIME	RETIRED	LOS ANGELES	MEDICAL	HMO
	SMALLPRIME	RETIRED	LOS ANGELES	MEDICAL	PPO
	SMALLPRIME	RETIRED	LOS ANGELES	DENTAL	HMO
	SMALLPRIME	RETIRED	LOS ANGELES	DENTAL	PPO

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Note: We have given the above sample to illustrate how the tags should be nested while sending an inbound message from the external system. However, you should not seamlessly use this sample in your environment because the required pre-requisite data may not be available in your environment. In such case, the system will give erroneous results.

Sample Health Care Inbound Message for Fully-Insured Group Policy Renewal

Using the below example, you can do the following:

- Renew a fully-insured group policy

The following table provides sample data through which you can renew a fully-insured group policy:

Person Name	Person Type	Policy Number	Plan Number	Policy Renewal Date	Policy End Date
WALSH_TYPES_GRP	Corp Customer	PL_MED_HEALTH_001	WALSH_TC_MED_PLAN_1	2024-01-01	2024-12-31

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Note: We have given the above sample to illustrate how the tags should be nested while sending an inbound message from the external system. However, you should not seamlessly use this sample in your environment because the required pre-requisite data may not be available in your environment. In such case, the system will give erroneous results.

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Sample Health Care Inbound Message for Fully-Insured Group Policy Reinstatement

Using the below example, you can do the following:

- Reinstate a fully-insured group policy

The following table provides sample data through which you can reinstate a fully-insured group policy:

Person Name	Person Type	Policy Number	Plan Number	Reinstatement Date	Policy End Date
GREG_INDUS	Group Customer	POL_DT_HLT_50	PL_DT_101	2024-05-15	2024-12-31

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        <currentErrorState></currentErrorState>
        <isRetried></isRetried>
    </toDoRetry>
</schema>
```

Note: We have given the above sample to illustrate how the tags should be nested while sending an inbound message from the external system. However, you should not seamlessly use this sample in your environment because the required pre-requisite data may not be available in your environment. In such case, the system will give erroneous results.

Sample Health Care Inbound Message for Fully-Insured Group Policy Termination

Using the below example, you can do the following:

- Terminate a fully-insured group policy

The following table provides sample data through which you can terminate a fully-insured group policy:

Person Name	Person Type	Policy Number	Plan Number	Termination Date	Policy End Date
HOP_TECH	Group Customer	PL_DENT_700	PN_DENT_505	2024-02-01	2024-12-31

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    <externalBatchId>13768</externalBatchId>
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```

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                    </terminationInformation>
                    <reinstateInformation>
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                    </reinstateInformation>
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                    <parameterValue>Y</parameterValue>
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                </modifierInformation>
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```

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</schema>
```

Note: We have given the above sample to illustrate how the tags should be nested while sending an inbound message from the external system. However, you should not seamlessly use this sample in your environment because the required pre-requisite data may not be available in your environment. In such case, the system will give erroneous results.

Sample Health Care Inbound Message for Fully-Insured Individual Membership Renewal

Using the below example, you can do the following:

- Renew a fully-insured individual membership

The following table provides sample data through which you can renew a fully-insured individual membership:

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Person Name	Member Relationship Type	Main Subscriber	Health Plan Code	Membership Renewal Date
GEOFF, TURNER	SELF	Yes	HPMINAG01	2024-01-01

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Note: We have given the above sample to illustrate how the tags should be nested while sending an inbound message from the external system. However, you should not seamlessly use this sample in your environment because the required pre-requisite data may not be available in your environment. In such case, the system will give erroneous results.

Sample Health Care Inbound Message for Fully-Insured Individual Membership Renewal of a Dependent Person

Using the below example, you can do the following:

- Renew a fully-insured individual membership

The following table provides sample data through which you can renew a fully-insured individual membership:

Person Name	Member Relationship Type	Main Subscriber	Health Plan Code	Membership Renewal Date
BRADLEY NICHOLSON	SELF	Yes	HP_SNR_GOLD	2024-01-05
RAMONA NICHOLSON	SPOUSE	No	HP_SNR_GOLD	2024-01-05

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Note: We have given the above sample to illustrate how the tags should be nested while sending an inbound message from the external system. However, you should not seamlessly use this sample in your environment because the required pre-requisite data may not be available in your environment. In such case, the system will give erroneous results.

Sample Health Care Inbound Message for Fully-Insured Individual Membership Termination

Using the below example, you can do the following:

- Terminate a fully-insured individual membership

The following table provides sample data through which you can renew a fully-insured individual membership:

Person Name	Member Relationship Type	Main Subscriber	Health Plan Code	Membership Termination Date
GLENN, MARSH	SELF	Yes	HPMINAG01	2024-03-31

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```

Note: We have given the above sample to illustrate how the tags should be nested while sending an inbound message from the external system. However, you should not seamlessly use this sample in your environment because the required pre-requisite data may not be available in your environment. In such case, the system will give erroneous results.

Health Product and Plan Inbound Message

On calling the **C1-HCProdHlthPlnInboundMessage** or **C1-HCProdHlthPlnInboundMes** web service, you can define a health product and plan inbound message using a health product and plan inbound message type. The **C1-HCProdHlthPlnInboundMessage** is a **SOAP** service which helps to create a health product, health plan, and pricing

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rule for a health plan through an inbound message, whereas the **C1-HCProdHlthPlnInboundMes** is a **RESTful** service which helps to create and edit a health product, health plan, and pricing rule for a health plan through an inbound message.

You can define a health product and plan inbound message type using the **Health Product and Plan Inbound Message Type (C1-HCProdHlthPlnInboundTyp)** business object through the **Inbound Message Type** screen. The health product and plan inbound message type business object encapsulates the following information:

- A business object using which you want to create the health product when the health product and plan inbound message is processed.
- A business object using which you want to create the health plan when the health product and plan inbound message is processed.

The health product and plan inbound message type helps the system to determine:

- **Inbound Message Business Object** - The business object using which the health product and plan inbound message should be created in the system. You must specify the **Health Product and Plan Inbound Message (C1-HCProdHlthPlnInbound)** business object in the health product and plan inbound message type. The health product and plan inbound message business object enables you to create and edit the following entities for a fully-insured individual customer through an inbound web service:
  - Health Product
  - Health Plan
  - Health Plan Pricing Rules

  Note: You can create or update the above entities either through a single or separate health product and plan inbound messages.
- **Health Care Product Business Object** - The business object using which health product should be created in the system. You must specify the **Health Care Product (C1-HealthcareProduct)** business object in the health product and plan inbound message type.
- **Health Plan Business Object** - The business object using which health plan should be created in the system. You must specify the **Health Plan (C1-HealthPlan)** business object in the health product and plan inbound message type.

On calling the **C1-HCProdHlthPlnInboundMessage** or **C1-HCProdHlthPlnInboundMes** web service, a batch named **C1-HCPHP** checks whether there are any health product and plan inbound messages in the **Pending** status. If there is a health product and plan inbound message in the **Pending** status, the batch changes the status of the health product and plan inbound message to the default next status (i.e. **Validation**). Then, the algorithm attached to the **Validation** status is triggered. If the validation is successful, the system changes the status of the health product and plan inbound message to **Processing**. Then, the algorithm attached to the **Processing** status is triggered. If the processing is successful, the system creates or updates the entities, such as health product, health plan, pricing rules for the health plan, and then changes the status of the health product and plan inbound message to **Processed**.

Related Topics

For more information on...	See...
How to setup the **C1-ASOBLLNG** feature configuration	Setting the C1-ASOBLLNG Feature Configuration on page 4417

Prerequisites

To use the health product and plan inbound message feature, you need to do the following:

- Define the required health product and plan inbound message types in the system.
- Assign the **Product (C1_PRODUCT)** maintenance object to the **Health Product (C1-HealthcareProduct)** business object, while defining the health product and plan inbound message type.
- Define the required characteristic types where the characteristic entity is set to **Inbound Message Type**
- Define the required characteristic types where the characteristic entity is set to **Inbound Message**.
- Define the required characteristic types where the characteristic entity is set to **Health Plan**.

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- Define the required characteristic types where the characteristic entity is set to **Product**.
- Define the **Health Product and Plan Inbound Message (C1-HCProdHlthPlnInbound)** business object in the system.
- Define the **Health Product and Plan Inbound Message Type (C1-HCProdHlthPlnInboundTyp)** business object in the system.
- Define the **Healthcare Product (C1-HealthcareProduct)** business object in the system.
- Define the **Health Plan (C1-HealthPlan)** business object in the system.
- Define the required pricing rule type business object in the system.
- Define the required values for the health plan in the **PRC_RULE_ENTITY_TYPE** lookup field.

Health Product and Plan Inbound Message Status Transition through User Interface

The following figure graphically indicates how a health care inbound message moves from one status to another when it is validated and processed through the user interface:

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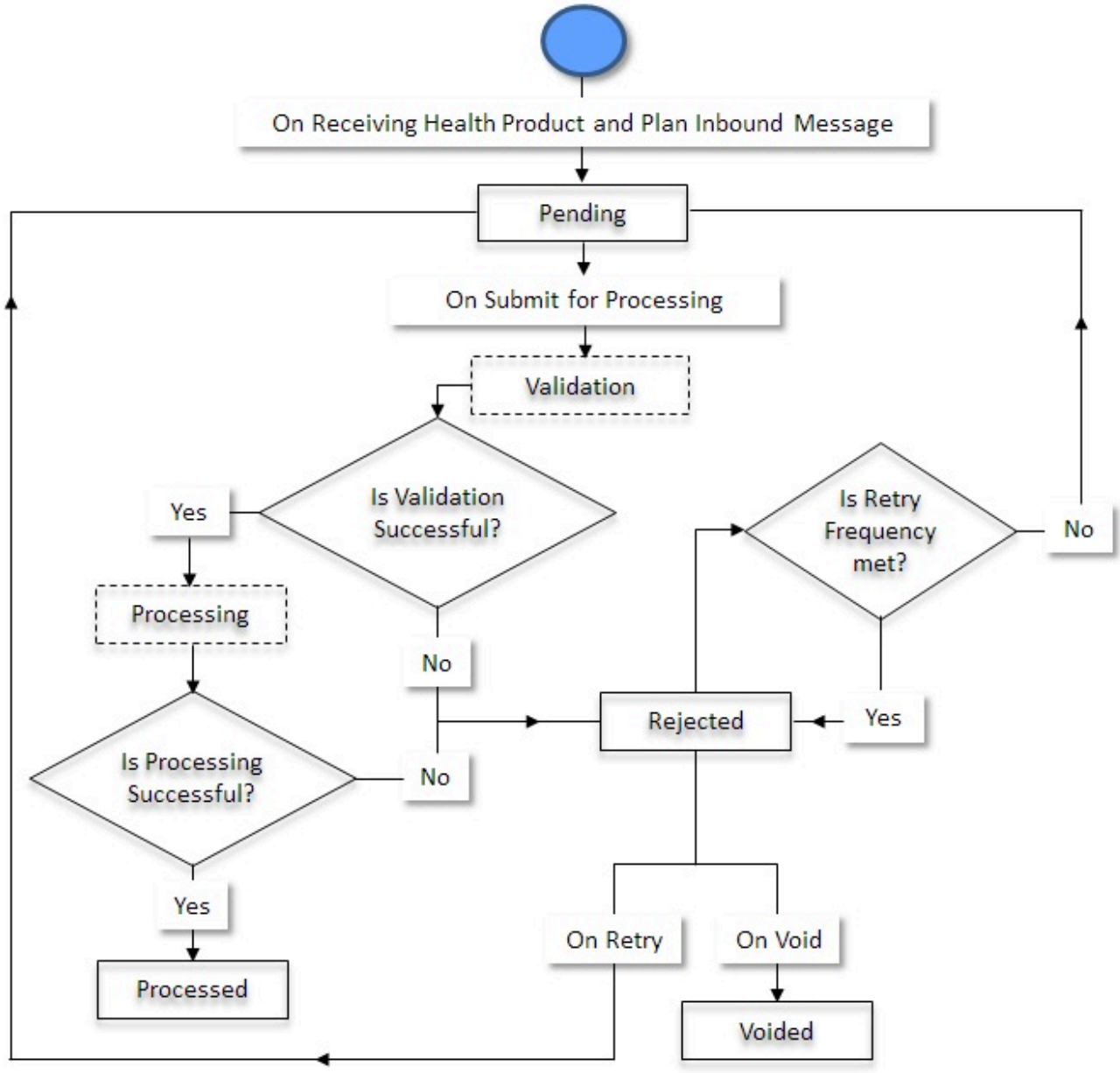

Health Product and Plan Inbound Message Status Transition through a Batch Process

The following figure graphically indicates how a health care inbound message moves from one status to another when it is validated and processed through the **Health Product and Plan Inbound Message Periodic Monitor (C1-HCPHP)** batch:

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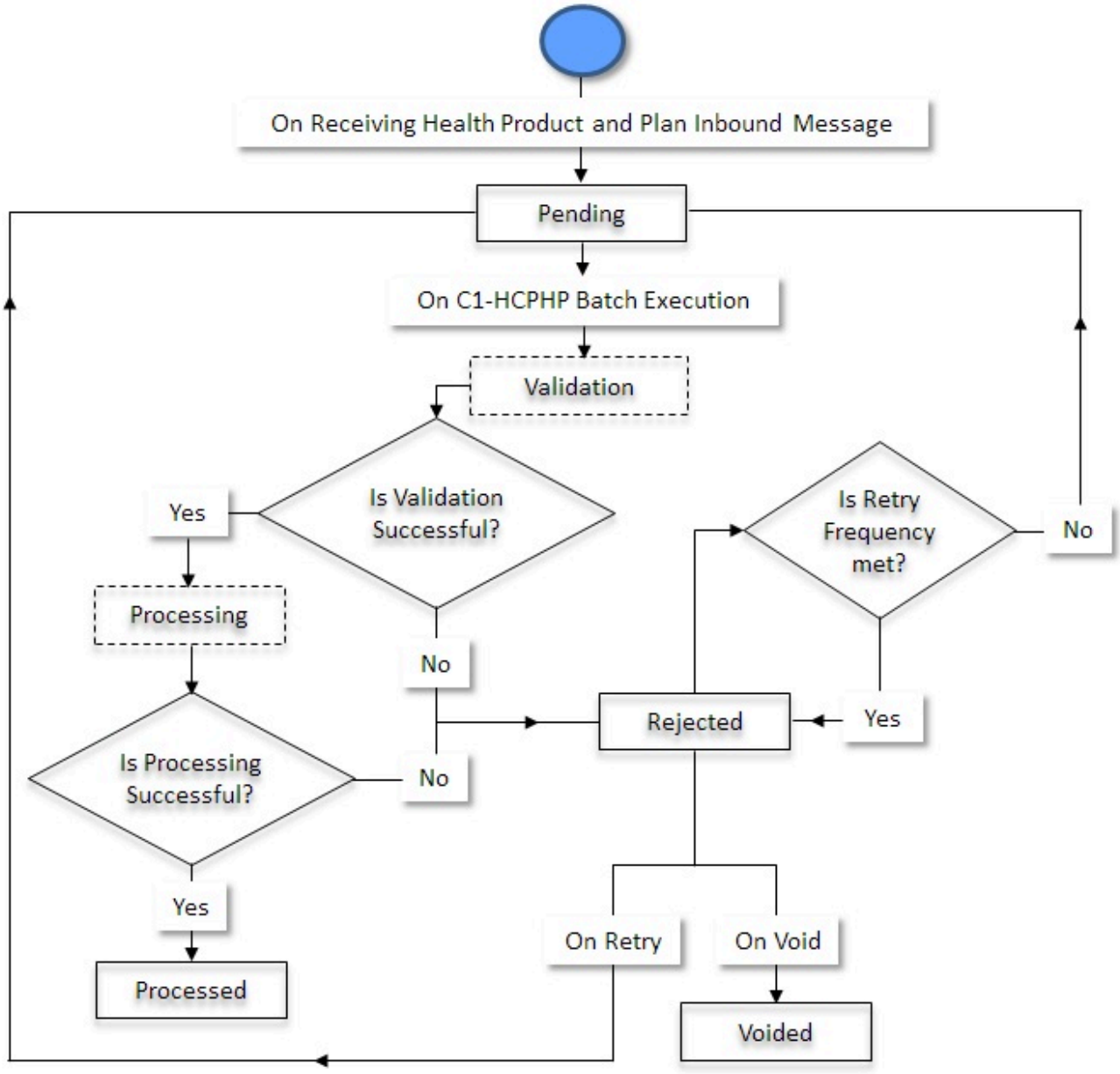

Algorithms Used in C1-HCProdHlthPlnInbound

The following table lists the algorithms which are used in the lifecycle of the **C1-HCProdHlthPlnInbound** business object:

Status	System Event	Algorithm	Algorithm Type	Description
Pending	Monitor	C1-AT-RQJ	C1-GEN-BOMNJ	Refer to C1-AT-RQJ on page 2288.
Validation	Monitor	F1-AT-RQJ	F1-GEN-BOMNJ	Refer to F1-AT-RQJ on page 225.
	Enter	C1-HLTPRDVAL	C1-HLTPRDVAL	Refer to C1-HLTPRDVAL on page 2637.
Processing	Monitor	F1-AT-RQJ	F1-GEN-BOMNJ	Refer to F1-AT-RQJ on page 225.
	Enter	C1-HCPRPROC	C1-HCPRPROC	Refer to C1-HCPRPROC on page 2638.

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Status	System Event	Algorithm	Algorithm Type	Description
Rejected	Monitor	C1-TODORETRY	C1-TODORETRY	Refer to C1-TODORETRY on page 2289.
	Enter	C1-TDCRINMSG	F1-TDCREATE	Refer to C1-TDCRINMSG on page 2289.
Processed	-	-	-	-
Voided	-	-	-	-

C1-AT-RQJ

This algorithm is invoked when the status of the customer or membership inbound message is changed to **Pending**. If the **isRetried** flag in the inbound message is set to **true**, it resets the flag to **false**.

It contains the following parameters:

- **Next Status** - Used when you want to override the default next status specified in the lifecycle.
- **Next Transition Condition** - Used when you want to override the default next transition condition specified in the lifecycle.

Note: At a time, you can specify value for either the **Next Status** or **Next Transition Condition** parameter. If you don't specify any value for these parameters, the system will transition the business object to the default next status specified in its lifecycle.

F1-AT-RQJ

This algorithm transitions the current status of the business object to the specified status. It contains the following parameters:

- **Next Status** – Used when you want to override the default next status specified in the lifecycle.
- **Next Transition Condition** – Used when you want to override the default next transition condition specified in the lifecycle.

At a time, you can specify value for either the **Next Status** or **Next Transition Condition** parameter. If you don’t specify any value for these parameters, the system will transition the business object to the default next status specified in its lifecycle.

C1-HLTPRDVAL

This algorithm is invoked when you execute the **Health Product Health Plan (C1-HCPHP)** periodic monitor batch or click the **Submit for Processing** button in the **Inbound Message** screen. This algorithm validates the Health Product and Plan Inbound Message, which is in the Pending status, to check the following conditions:

- Whether the specified **Inbound Message Type** and **Inbound Message Business Object** are valid.
- Whether the specified source system is valid and does exists in the **Source System Extendable Lookup (C1-SourceSystemLookup)**.
- Whether the mandatory data (such as health product code, description, product type, bundled product, start date, status) is specified in the health product.
- Whether the mandatory data (such as health plan code, description, health product, start date, status) is specified in the health plan.
- Whether the mandatory data (such as health plan code, charge, start date, pricing rule) is specified in the health plan pricing rules.
- Whether the specified data for the lookup columns matches with those mentioned in the system.
- Whether all of the switch columns either contain **Y** or **N** as values.
- Whether the specified end date for health product, health plan, and health pricing rule is greater than the start date.

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- Whether the product is mapped to the division which exists in the system, and the product - division mapping is a one time process.
- Whether the product code is mapped with the health plan exists in the system.
- Whether the characteristic type mapped with the respective entity exists in the system.
- Whether the specified pricing rule type for creating the pricing rule exists in the system in the **Active** status, and the pricing rule type - health plan mapping is a one time process.
- Whether the specified price item and price item parameters for pricing rule eligibility are valid, and the price item parameters exist in the **CI_PRICE_PARM** table.
- Whether the price item parameters that have parameter usage specified as **Pricing Rule Eligibility Criteria** are available while defining the pricing rule eligibility for the pricing rule.
- Whether the entity type is specified as **Health Plan** and entity value as **Health Plan Code** while creating a pricing rule for a health plan.

Note:

This algorithm does not consider the following validations or checks:

- No validation is performed between the date range of the product and health plan.
- No check is performed whether the product is in the **Active** status while creating a health plan.
- No check is performed whether the health plan is in the **Active** status while creating the health plan pricing rules.
- No check is performed on the set of the pricing rule eligibility, which is defined on multiple pricing rules, for a price item.
- No validation is performed if duplicate parameters are defined for a pricing rule.

C1-HCPRPROC

This algorithm is invoked when the health product and plan inbound message is successfully validated. This algorithm creates or updates the health product, health plan, and health plan pricing rule information for individual memberships.

This algorithm fetches the business object from the health product and plan inbound message type to create or update the records for health product, health plan, and health plan pricing rule. The algorithm performs the following operations:

- Creates or updates the health product based on the health product code.
- Creates or updates the health plan based on the health plan code.
- Creates or updates the health plan pricing rules based on the price item, health plan, start date, and eligibility criteria.

Note:

The pricing rule eligibility is optional while creating or updating the pricing rules for the health plan.

The health product and plan inbound message log maintains complete trail of actions performed on health product, health plan, and health plan pricing rules.

C1-TODORETRY

This algorithm is invoked when the status of the customer or membership inbound message is changed to **Rejected**. It checks whether the maximum retry attempts are met. If the retry attempt is less than or equal to the value defined in the **Maximum Retry** parameter, the status of the inbound message is changed to **Pending**. However, if the retry attempt is greater than the value defined in the **Maximum Retry** parameter, the status of the inbound message remains as **Rejected**.

Note: This algorithm is invoked when the customer or membership inbound message is validated and processed through the batch process.

It contains the following parameters:

- **Maximum Retry** - Used to specify the maximum number of times the inbound message can be revalidated and reprocessed on failure.
- **Maximum Retry Element Name** - This parameter is not used at the moment.

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If you do not specify any value for the **Maximum Retry** parameter, the system uses the value defined in the **To Do Maximum Retries** status option (which is defined in the lifecycle of the **C1-CustomerInboundMessage** and **C1-MemberInboundMessage** business object) to check whether the maximum retry attempts are met. If the value is not specified for the **To Do Maximum Retries** status option, the system does not allow revalidating and reprocessing an inbound message, and the status of the inbound message remains as **Rejected**.

C1-TDCRINMSG

This algorithm is invoked when the status of the customer or membership inbound message is changed to **Rejected**. It creates a To Do using the specified To Do type and assigns it to users with the specified To Do role.

It contains the following parameters:

- **To Do Type** - Used to specify the type of notification that you want to generate when the inbound message validation or processing fails.
- **To Do Role** - Used to specify the To Do role to indicate the users to whom you want to send the notification when the inbound message validation or processing fails.

The rest of the parameters, such as **To Do Type Element Name**, **To Do Role Element Name**, **Message Category**, **Message Number**, **Characteristic Type For Log Entry**, **To Do Sort Keys Retriever Script**, **Discard Cancel Terminate Reason Element**, **Discard Cancel Terminate Reason**, **Retry Frequency**, and **Retry Frequency Element Name**, are not used at the moment.

Health Product and Plan Inbound Message XML Format

Note: We recommend you to refer the Health Product and Plan Inbound Message schema in parallel while understanding the below mentioned tags. This will help you to understand how the tags are nested in the schema.

Before calling the **C1-HCProdHlthPlnInboundMessage** inbound web service, you need to ensure that the health product and plan inbound message contains the following tags:

Tag Name	Tag Description	Mandatory (Yes or No)
schema	Used to specify the tags of a health product and plan inbound message.	Yes
messageType	Used to indicate the health product and plan inbound message type using which the health product and plan inbound message should be created in the system. **Note:** You must specify a valid health product and plan inbound message type which is created using the **C1-HCProdHlthPlnInboundTyp** business object and which is in the **Active** status. The system then derives the business objects using which the health product and plan inbound message, health products, and health plans should be created from the health product and plan inbound message type.	Yes
sourceSystem	Used to indicate the external system from where the health product and plan inbound message is received. **Note:** You must specify a source system which is already defined in the **C1-SourceSystemLookup** extendable lookup. It must be in the **Active** status.	Yes

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Tag Name	Tag Description	Mandatory (Yes or No)
externalTransactionId	Used to indicate the transaction in the external source system which resulted in the health product and plan inbound message.	No
externalBatchId	Used to indicate the external batch job or batch run number through which the health product and plan inbound message is created.	Yes
externalSourceId	Used to specify the external source system ID.	Yes
characteristics	You can use this tag within the following tags: • **schema** - Here, the **characteristics** tag is used to specify a list of characteristics for the health product and plan inbound message. • **healthPlanPricingRuleData** - Here, the **characteristics** tag is used to specify a list of characteristics for the pricing rule of a health plan.	No
inboundMessageCharacteristic	Used to specify a characteristic for the health product and plan inbound message.	No
adhocCharacteristicValue	Used to specify the value for the adhoc characteristic type.	Yes (Conditional) **Note:** This data is required while defining or editing an adhoc characteristic of the health product and plan inbound message.
characteristicType	You can use this tag within the following tags: • **inboundMessageCharacteristic** - Here, the **characteristicType** tag is used to specify the characteristic type. Here, you must specify a characteristic type where the characteristic entity is set to **Inbound Message**. • **productCharacteristics** - Here, the **characteristicType** tag is used to specify the characteristic type. Here, you must specify a characteristic type where the characteristic entity is set to **Product**. • **healthPlanCharacteristics** - Here, the **characteristicType** tag is used to specify the characteristic type. Here, you must specify a characteristic type where the characteristic entity is set to **Health Plan**. • **characteristicsList** - Here, the **characteristicType** tag is used to specify the characteristic type. Here, you must specify a characteristic type where the characteristic entity is set to **Pricing Rule**.	Yes (Conditional) **Note:** This data is required while defining or editing a characteristic of the respective entity.
effectiveDate	You can use this tag within the following tags: • **inboundMessageCharacteristic** - Here, the **effectiveDate** tag is used to specify the date from when the characteristic is effective for the health product and plan inbound message.	Yes (Conditional) **Note:** This data is required while defining or editing a characteristic of the respective entity.

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Tag Name	Tag Description	Mandatory (Yes or No)
	• **productCharacteristics** - Here, the **effectiveDate** tag is used to specify the date from when the characteristic is effective for the health product. • **healthPlanCharacteristics** - Here, the **effectiveDate** tag is used to specify the date from when the characteristic is effective for the health plan. • **characteristicsList** - Here, the **effectiveDate** tag is used to specify the date from when the characteristic is effective for the pricing rule of a health plan. **Note:** You must specify the date in the `YYYY-MM-DD` format.	
characteristicValue	You can use this tag within the following tags: • **inboundMessageCharacteristic** - Here, the **characteristicValue** tag is used to specify the value for the predefined characteristic type. • **productCharacteristics** - Here, the **characteristicValue** tag is used to specify the value for the characteristic type. • **healthPlanCharacteristics** - Here, the **characteristicValue** tag is used to specify the value for the characteristic type. • **characteristicsList** - Here, the **characteristicValue** tag is used to specify the value for the characteristic type.	Yes (Conditional) **Note:** This data is required while defining or editing a characteristic of the respective entity.
characteristicValueForeignKey1	Used to specify the first value for the foreign key characteristic type.	Yes (Conditional) **Note:** This data is required while defining or editing a foreign key characteristic of the health product and plan inbound message.
characteristicValueFK2	Used to specify the second value for the foreign key characteristic type.	No
characteristicValueFK3	Used to specify the third value for the foreign key characteristic type.	No
characteristicValueFK4	Used to specify the fourth value for the foreign key characteristic type.	No
characteristicValueFK5	Used to specify the fifth value for the foreign key characteristic type.	No
productHealthPlanMessage	Used to specify the details of a health product, health plan, or pricing rule for a health plan.	Yes
HealthProductData	Used to specify the details of a health product.	Yes (Conditional) **Note:** This data is required while defining or editing a health product.
healthProductCode	Used to indicate the type of product. The valid values are:	Yes

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Tag Name	Tag Description	Mandatory (Yes or No)
	• **EPO** - Indicates that the product type is exclusive provider organization. • **HMO** - Indicates that the product type is health maintenance organization. • **POS** - Indicates that the product type is point of service plan. • **PPO** - Indicates that the product type is preferred provider organization. **Note:** You must specify a value which is already defined in the **PRODUCT_TYPE_FLG** lookup field. It must be in the **Active** status. You can use this tag within the following tags: • **HealthProductData** - Here, the **healthProductCode** tag is used to specify the unique identifier for the health product. • **healthPlanData** - Here, the **healthProductCode** tag is used to indicate the health product for which you want to define the health plan.	
description	You can use this tag within the following tags: • **HealthProductData** - Here, the **description** tag is used to specify the description for the health product. • **healthPlanData** - Here, the **description** tag is used to specify the description for the health plan.	Yes
productType	Used to indicate how the health product can be classified based on the provider network. **Note:** You must specify a value which is already defined in the **PRODUCT_TYPE_FLG** lookup field. It must be in the **Active** status.	Yes
productSubType	Used to indicate the type of medical accounts that are linked to the health product. The valid values are: • **FSA** - Indicates that the product sub type is flexible spending account. • **HRA** - Indicates that the product sub type is health reimbursement account. • **HSA** - Indicates that the product sub type is point of service plan. • **MC** - Indicates that the product sub type is medicare cost. • **MR** - Indicates that the product sub type is medicare risk. **Note:** You must specify a value which is already defined in the **PRODUCT_SUB_TYPE_FLG** lookup field. It must be in the **Active** status.	No
productHCCategory	Used to indicate the health care category to which the health product belongs. The valid value is: • **MED** - Indicates the health care category of product is medical.	No

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Tag Name	Tag Description	Mandatory (Yes or No)
	Note: You must specify a value which is already defined in the **PRODUCT_HC_CAT_FLG** lookup field. It must be in the **Active** status.	
productAdministration	Used to specify the name of the agency which administers the health product.	No
productLOB	Used to indicate the line of business to which the health product belongs. The valid value is: • **SHOP** - Indicates the line of business to which the health product belongs is shopping mall. **Note:** You must specify a value which is already defined in the **PRODUCT_LOB_FLG** lookup field. It must be in the **Active** status.	No
productLOBCategory	Used to indicate the line of business category to which the health product belongs.The valid value is: • **COMM** - Indicates the line of business category to which the health product belongs is commercial. • **GOVT** - ndicates the line of business category to which the health product belongs is government. • **STPG** - ndicates the line of business category to which the health product belongs is state programs. **Note:** You must specify a value which is already defined in the **PRODUCT_LOB_CAT_FLG** lookup field. It must be in the **Active** status.	No
bundledProduct	Used to indicate whether the health product is a bundled product. The valid values are: • Y • N	Yes
bundledProducts	Used to specify the health products which are included in the bundled product.	Yes (Conditional) **Note:** This data is required when the health product is a bundled product (i.e. when the **bundledProduct** tag contains **Y**).
startDate	You can use this tag within the following tags: • **HealthProductData** - Here, the **startDate** tag is used to specify the date from when the health product is effective. **Note:** The health product start date cannot be later than the health product end date. • **healthPlanData** - Here, the **startDate** tag is used to specify the date from when the health plan is effective.	Yes

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Tag Name	Tag Description	Mandatory (Yes or No)
	Note: The health plan start date cannot be later than the health plan end date. The health plan start date cannot be earlier than the health product start date and later than the health product end date. • **healthPlanPricingRuleData** - Here, the **startDate** tag is used to specify the date from when the pricing rule of a health plan is effective. **Note:** The pricing rule start date cannot be later than the pricing rule end date. The pricing rule start date cannot be earlier than the health plan start date and later than the health plan end date. **Note:** You must specify the date in the `YYYY-MM-DD` format.	
endDate	You can use this tag within the following tags: • **HealthProductData** - Here, the **endDate** tag is used to specify the date till when the health product is effective. **Note:** The health product end date cannot be earlier than the health product start date. • **healthPlanData** - Here, the **endDate** tag is used to specify the date till when the health plan is effective. **Note:** The health plan end date cannot be earlier than the health plan start date. The health plan end date cannot be earlier than the health product start date and later than the health product end date. • **healthPlanPricingRuleData** - Here, the **endDate** tag is used to specify the date till when the pricing rule of a health plan is effective. **Note:** The pricing rule end date cannot be earlier than the pricing rule start date. The pricing rule end date cannot be earlier than the health plan start date and later than the health plan end date. **Note:** You must specify the date in the `YYYY-MM-DD` format.	No
status	You can use this tag within the following tags:	Yes

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Tag Name	Tag Description	Mandatory (Yes or No)

	• **HealthProductData** - Here, the **status** tag is used to indicate the status of the health product. The valid values are:
	  • ACTIVE
	  • INACTIVE
	• **healthPlanData** - Here, the **status** tag is used to indicate the status of the health plan. The valid values are:
	  • ACTIVE
	  • INACTIVE
	• **healthPlanPricingRuleData** - Here, the **status** tag is used to indicate the status of the pricing rule. The valid values are:
	  • PENDING
	  • ACTIVE
	  • INACTIVE	

productCharacteristics	Used to specify a list of characteristics for the health product.	No
healthProductDivision	Used to specify a list of divisions where the health product is available.	Yes (Conditional) **Note:** This data is required while associating a health product with a division.
division	Used to indicate the division where the health product is available. **Note:** If you associate the health product with a division, the system only allows the persons belonging to the division to enroll for different health plans of the health product. However, if you do not associate the health product to any division, the system allows the persons belonging to different divisions to enroll for different health plans of the health product.	Yes
healthPlanData	Used to specify the details of the health plan.	Yes (Conditional) **Note:** This data is required while defining or editing a health plan.
healthPlanCode	Used to specify the unique identifier for the health plan.	Yes
charitablePlan	Used to indicate whether the health plan provides subsidized health insurance coverage. The valid values are: • Y • N **Note:** If you do not specify the value, by default, it is set to **N**.	No
standardPlan	Used to indicate whether the health plan provides standard health insurance coverage. The valid values are: • Y • N	No

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Tag Name	Tag Description	Mandatory (Yes or No)
	Note: If you do not specify the value, by default, it is set to **N**.	
acaQhp	Used to indicate whether the health plan provides Affordable Care Act (ACA) qualified health insurance coverage. The valid values are: • Y • N **Note:** If you do not specify the value, by default, it is set to **N**.	No
grandFatherPlan	Used to indicate whether the health plan is a grandfathered health plan. The valid values are: • Y • N **Note:** If you do not specify the value, by default, it is set to **N**.	No
ancillaryBenefits	Used to indicate whether the health plan provides ancillary benefits. The valid values are: • Y • N **Note:** Ancillary benefits are a secondary type of health insurance coverage that covers miscellaneous medical expenses that are incurred during a stay at the hospital. For example, it can cover expenses such as ambulance transportation, blood, drugs, and medical supplies like bandages. If you do not specify the value, by default, it is set to **N**.	No
riderBenefits	Used to indicate whether the health plan provides rider benefits. The valid values are: • Y • N **Note:** A rider is an additional benefit that can be included to the basic health insurance plan. By adding riders, the insurance coverage can be expanded as per the requirement and at a lower cost. If you do not specify the value, by default, it is set to **N**.	No
addOnPlan	Used to indicate whether the health plan is an add-on health plan. The valid values are: • Y • N	No

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Tag Name	Tag Description	Mandatory (Yes or No)
	Note: If you do not specify the value, by default, it is set to **N**. An add-on health plan may provide ancillary or rider benefits. It is also known as a supplemental health plan. As these add-on plans provide additional benefits over the base plan, they are not considered as the standalone plan.	
hiosId	Used to specify the Health Insurance Oversight System ID.	Yes (Conditional) **Note:** This data is required while associating the hiosId for a health plan.
healthPlanCharacteristics	Used to specify a list of characteristics for the health plan.	Yes (Conditional) **Note:** This data is required while defining or editing the characteristics of a health plan.
healthPlanPricingRuleTypes	Used to associate the pricing rule types with the health plan.	Yes (Conditional) **Note:** This data is required while associating a pricing rule type with the health plan.
pricingRuleType	You can use this tag within the following tags: • **healthPlanPricingRuleTypes** - Here, the **pricingRuleType** tag is used to specify the pricing rule type. • **healthPlanPricingRuleData** - Here, the **pricingRuleType** tag is used to indicate the pricing rule type using which you want to define the pricing rule. **Note:** At present, you can only specify those pricing rule types where the category is set to **Age Based**, **Tier Based**, **Discount Charge**, **Additional Fee**, and **Benefit**.	Yes (Conditional) **Note:** This data is required while associating a pricing rule type with the health plan and while defining or editing a pricing rule for a health plan.
healthPlanPricingRuleData	Used to specify the details of the pricing rule.	Yes (Conditional) **Note:** This data is required while defining or editing a pricing rule defined for the health plan.
sequence	You can use this tag within the following tags:	Yes (Conditional)

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Tag Name	Tag Description	Mandatory (Yes or No)
	• **healthPlanPricingRuleData** - Here, the **sequence** tag is used to indicate the order in which the pricing rules should be created in the system. • **baseRate** - Here, the **sequence** tag is used to indicate the order in which the price component should be created using the given base rate information. • **pricingParameter** - Here, the **sequence** tag is used to indicate the order in which the pricing eligibility criteria should be created using the parameter information. • **modifierInformation** - Here, the **sequence** tag is used to indicate the order in which the pricing eligibility criteria should be created using the modifier information. • **pricingRuleEligibility** - Here, the **sequence** tag is used to indicate the order in which the pricing rule eligibility should be created for the health plan.	**Note:** This data is required while defining or editing the respective information.
entityIdentifiers	Used to specify a list of entities (i.e. policy, source system, and plan) using which you can derive the plan to which you want to associate the pricing rule.	Yes
entityIdentifiersList	Used to specify the details of the entity.	Yes
entityIdentifierType	Used to specify the entity type. The valid values are: • **HLPN** - Used when you want to specify the health plan. • **PER** - Used when you want to specify the person. • **PIDT** - Used when you want to specify the person identifier type. • **PIDV** - Used when you want to specify the person identifier value. • **PLAN** - Used when you want to specify the plan. • **PLCY** - Used when you want to specify the policy. • **SSYS** - Used when you want to specify the source system. • **STAT** - Used when you want to specify the state. **Note:** You must specify a value which is already defined in the **PRC_RULE_ENTITY_TYPE** lookup field. It must be in the **Active** status.	Yes (Conditional) **Note:** This data is required while defining or editing a pricing rule defined for the health plan.
entityIdentifierValue	Used to specify the entity identifier (i.e. plan number, policy number, or source system).	Yes (Conditional) **Note:** This data is required while defining or editing a pricing rule defined for the health plan.
priceItemCd	Used to indicate the price item for which you want to define the pricing rule. **Note:** You must specify a price item which is already associated with the respective pricing rule type.	Yes (Conditional) **Note:** This data is required while defining or editing a pricing rule defined for the health plan.

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Tag Name	Tag Description	Mandatory (Yes or No)
rateOption	Used to indicate the rate option using which you want to create price assignment for the pricing rule of a health plan. **Note:** You must specify a rate option which is already defined in the **C1-ExtLookRetTypeRateOpt** extendable lookup. It must be in the **Active** status. If the rate option is not given for an age-based pricing rule, by default, it is set to: • The value specified in the **Default Rate Option - Flat** option type of the **C1-ASOBLLNG** feature configuration when the modifier method is set to **FLAT** • The value specified in the **Default Rate Option - Percentage** option type of the **C1-ASOBLLNG** feature configuration when the modifier method is set to **EXPT** or **INPT** However, if the rate option is not given for a tier-based pricing rule, by default, it is set to a value specified in the **Default Rate Option - Flat** option type of the **C1-ASOBLLNG** feature configuration when the modifier method is set to **FLAT** or **NULL**.	No
pricingType	Used to indicate the type of pricing defined for the pricing rule. The valid values are: • **FLAT** • **PCNT** **Note:** You must specify a value which is already defined in the **PRC_TYPE_FLG** lookup field. It must be in the **Active** status.	Yes
modifierApplicability	Used to indicate whether you want to increase or decrease the premium of an eligible member based on certain modifiers (i.e. parameters, such as tobacco usage, alcohol usage, and so on). The valid values are: • **Y** • **N** **Note:** You must specify a value which is already defined in the **HC_MODIFIER_APPLICABILITY** lookup field. It must be in the **Active** status. If you do not specify the value, by default, it is set to **N**.	No
modifierMethod	Used to indicate whether the system should consider the modifier rate as a flat amount or percentage. The valid values are: • **EXPT** - Indicates that the system should consider the modifier rate as exclusive percentage. • **FLAT** - Indicates that the system should consider the modifier rate as a flat amount.	Yes (Conditional) **Note:** This data is required when the **modifierApplicability** tag contains **Y**.

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Tag Name	Tag Description	Mandatory (Yes or No)
	• **INPT** - Indicates that the system should consider the modifier rate as inclusive percentage. **Note:** You must specify a value which is already defined in the **HC_MODIFIER_METHOD** lookup field. It must be in the **Active** status.	
baseRate	Used to specify the base fees for employees with a particular set of attributes. You can define different base fees for employees with different set of attributes. **Note:** While creating a price assignment for the pricing rule, the system creates one price component for each given set of base rate information.	Yes (Conditional) **Note:** This data is required while defining a pricing rule for the health plan.
baseFee	Used to specify the base fees for the health plan.	Yes (Conditional) **Note:** This data is required while defining a pricing rule for the health plan.
lowerAgeLimit	Used to specify the lower age limit. It is used to define lower age limit pricing eligibility criteria in the price component. **Note:** The system defines the lower age limit pricing eligibility criteria using the parameter which is specified in the **Age Based Parameter** option type of the **C1-ASOBLLNG** feature configuration. This data is ignored when given in a tier-based pricing rule information.	Yes (Conditional) **Note:** This data is required while defining or editing an age-based pricing rule for the health plan.
upperAgeLimit	Used to specify the upper age limit. It is used to define upper age limit pricing eligibility criteria in the price component. **Note:** The system defines the upper age limit pricing eligibility criteria using the parameter which is specified in the **Age Based Parameter** option type of the **C1-ASOBLLNG** feature configuration. This data is ignored when given in a tier-based pricing rule information.	Yes (Conditional) **Note:** This data is required while defining an age-based pricing rule for the health plan.
pricingParameter	Used to specify a set of employee attributes based on which the base fees may vary.	Yes (Conditional) **Note:** This data is required while defining a tier-based pricing rule for the health plan.

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Tag Name	Tag Description	Mandatory (Yes or No)
parameterCode	You can use this tag within the following tags: • **pricingParameter** - Here, the **parameterCode** tag is used to specify the employee attribute (i.e. parameter, such as employee status, employee location, and so on) using which you want to define the pricing eligibility criteria. • **modifierInformation** - Here, the **parameterCode** tag is used to specify the modifier (i.e. parameter, such as tobacco usage, alcohol usage, and so on) using which you want to define the pricing eligibility criteria. **Note:** You must define the employee attributes and modifiers as parameters in the system. Note that you must set the parameter usage for these parameters to **Pricing Eligibility Criteria**. The system creates an pricing eligibility criteria for each parameter and/or modifier specified in the pricing rule information. You cannot specify any special character except underscore (_) in the parameter name.	Yes (Conditional) **Note:** This data is required while specifying the respective information.
parameterValue	You can use this tag within the following tags: • **pricingParameter** - Here, the **parameterCode** tag is used to specify the value for the parameter (i.e. employee attribute). • **modifierInformation** - Here, the **parameterCode** tag is used to specify the value for the parameter (i.e. modifier). **Note:** You can specify any special characters except ampersand (&), comma (,), underscore (_), equal to (=), tilde (~), and semi-colon(;) in the parameter value.	Yes (Conditional) **Note:** This data is required while specifying the respective information.
modifierInformation	Used to specify the modifier based on which you want to increase or decrease the base fees. **Note:** While creating a price assignment for the pricing rule, the system creates one price component for each given set of modifier information and then links these modifier price components with the respective base rate price component.	Yes (Conditional) **Note:** This data is required while specifying the modifier information.
rate	Used to specify the flat amount or percentage by which you want to increase or decrease the premium of an eligible member.	Yes (Conditional) **Note:** This data is required while specifying the modifier information.
characteristicsList	Used to specify a characteristic for the health plan.	Yes (Conditional) **Note:** This data is required while defining or editing a characteristic of the respective entity.

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Tag Name	Tag Description	Mandatory (Yes or No)
pricingRuleEligibility	Used to specify a set of attributes based on which the pricing rule eligibility is decided.	Yes (Conditional) **Note:** This data is required while defining or editing an age or tier-based pricing rule for the health plan.
priceParmCode	Used to specify the pricing attribute using which you want to define the pricing eligibility criteria.	Yes (Conditional) **Note:** This data is required while specifying the respective information.
priceParmVal	Used to specify the value for the parameter (i.e. pricing attribute).	Yes (Conditional) **Note:** This data is required while specifying the respective information.

The following table lists and describes the tags which are available in the health care inbound message schema, but should not be included in the XML file:

Tag Name	Tag Description
c1InboundMessage	Displays the inbound message ID.
bo	Indicates the business object using which the health product and plan inbound message is created in the system.
boStatus	Displays the status of the health product and plan inbound message.
statusReason	Indicates the reason why the status of the health product and plan inbound message is changed.
statusDateTime	Displays the date and time when the status of the health product and plan inbound message is changed in the system.
creationDateTime	Displays the date and time when the health product and plan inbound message is created in the system.
version	This tag appears within the following parent tags: • **schema** - Here, the **version** tag displays the version of the health product and plan inbound message. • **inboundMessageCharacteristic** - Here, the **version** tag displays the version of the characteristic defined for the health product and plan inbound message.
searchCharacteristicValue	At present, this tag is not supported in a health product and plan inbound message.
toDoRetry	Displays the information about the retry option used for the health product and plan inbound message.

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Tag Name	Tag Description
	Note: This information appears at the bottom of the inbound message in the **Inbound Message Content** zone once the health product and plan inbound message is validated and processed either through the user interface or batch process.
retryDateTime	Displays the date and time when the retry option is used to change the status of the health product and plan inbound message from **Rejected** to **Pending**.
numberOfRetries	Indicates the number of times the retry option is used for the health product and plan inbound message.
currentErrorState	Indicates the status to which the health care inbound message is transitioned when its validation or processing fails. The valid value is: • REJECTED
isRetried	Indicates whether the retry option is used to change the status of the health product and plan inbound message. The valid values are: • true • false

Related Topics

For more information on...	See...
Health Product and Plan Inbound Message Schema	Health Product and Plan Inbound Message Schema on page 2653
Sample Health Product and Plan Inbound Message for Health Product Setup	Sample Health Product and Plan Inbound Message for Health Product Setup on page 2655
Sample Health Care Inbound Message for Health Plan Setup	Sample Health Product and Plan Inbound Message for Health Plan Setup on page 2656
Sample Health Care Inbound Message for Health Plan Pricing Rules Setup	Sample Health Product and Plan Inbound Message for Health Plan Pricing Rules Setup on page 2658
How to setup the **C1-ASOBLLNG** feature configuration	Setting the C1-ASOBLLNG Feature Configuration on page 4417

Health Product and Plan Inbound Message Schema

The following code snippet illustrates how the tags are nested in the Health Product and Plan Inbound Message schema:

```
<schema>
    <c1InboundMessage></c1InboundMessage>
    <bo></bo>
    <boStatus></boStatus>
    <statusReason></statusReason>
    <messageType></messageType>
    <sourceSystem></sourceSystem>
    <externalTransactionId></externalTransactionId>
    <externalBatchId></externalBatchId>
    <externalSourceId></externalSourceId>
    <statusDateTime></statusDateTime>
```

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```
    <creationDateTime></creationDateTime>
    <version></version>
    <characteristics>
        <inboundMessageCharacteristic>
            <adhocCharacteristicValue></adhocCharacteristicValue>
            <characteristicType></characteristicType>
            <effectiveDate></effectiveDate>
            <characteristicValue></characteristicValue>
            <characteristicValueForeignKey1></characteristicValueForeignKey1>
            <characteristicValueFK2></characteristicValueFK2>
            <characteristicValueFK3></characteristicValueFK3>
            <characteristicValueFk4></characteristicValueFk4>
            <characteristicValueFK5></characteristicValueFK5>
            <searchCharacteristicValue></searchCharacteristicValue>
            <version></version>
        </inboundMessageCharacteristic>
    </characteristics>
    <productHealthPlanMessage>
        <HealthProductData>
            <healthProductCode></healthProductCode>
            <description></description>
            <productType></productType>
            <productSubType></productSubType>
            <productHCCategory></productHCCategory>
            <productAdministration></productAdministration>
            <productLOB></productLOB>
            <productLOBCategory></productLOBCategory>
            <bundledProduct></bundledProduct>
            <bundledProducts></bundledProducts>
            <startDate></startDate>
            <endDate></endDate>
            <status></status>
            <productCharacteristics>
                <characteristicType></characteristicType>
                <characteristicValue></characteristicValue>
                <effectiveDate></effectiveDate>
            </productCharacteristics>
            <healthProductDivision>
                <division></division>
            </healthProductDivision>
        </HealthProductData>
        <healthPlanData>
            <healthProductCode></healthProductCode>
            <healthPlanCode></healthPlanCode>
            <description></description>
            <charitablePlan></charitablePlan>
            <standardPlan></standardPlan>
            <acaQhp></acaQhp>
            <grandFatherPlan></grandFatherPlan>
            <ancillaryBenefits></ancillaryBenefits>
            <riderBenefits></riderBenefits>
            <addOnPlan></addOnPlan>
            <hiosId></hiosId>
            <startDate></startDate>
            <endDate></endDate>
            <status></status>
            <healthPlanCharacteristics>
                <characteristicType></characteristicType>
                <characteristicValue></characteristicValue>
                <effectiveDate></effectiveDate>
            </healthPlanCharacteristics>
            <healthPlanPricingRuleTypes>
                <pricingRuleType></pricingRuleType>
            </healthPlanPricingRuleTypes>
        </healthPlanData>
        <healthPlanPricingRuleData>
            <sequence></sequence>
            <entityIdentifiers>
                <entityIdentifiersList>
                    <entityIdentifierType></entityIdentifierType>
                    <entityIdentifierValue></entityIdentifierValue>
```

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```
                </entityIdentifiersList>
            </entityIdentifiers>
            <pricingRuleType></pricingRuleType>
            <priceItemCd></priceItemCd>
            <status></status>
            <startDate></startDate>
            <endDate></endDate>
            <rateOption></rateOption>
            <pricingType></pricingType>
            <modifierApplicability></modifierApplicability>
            <modifierMethod></modifierMethod>
            <baseRate>
                <sequence></sequence>
                <baseFee></baseFee>
                <lowerAgeLimit></lowerAgeLimit>
                <upperAgeLimit></upperAgeLimit>
                <pricingParameter>
                    <sequence></sequence>
                    <parameterCode></parameterCode>
                    <parameterValue></parameterValue>
                </pricingParameter>
                <modifierInformation>
                    <sequence></sequence>
                    <parameterCode></parameterCode>
                    <parameterValue></parameterValue>
                    <rate></rate>
                </modifierInformation>
            </baseRate>
            <characteristics>
                <characteristicsList>
                    <characteristicType></characteristicType>
                    <characteristicValue></characteristicValue>
                    <effectiveDate></effectiveDate>
                </characteristicsList>
            </characteristics>
            <pricingRuleEligibility>
                <sequence></sequence>
                <priceParmCode></priceParmCode>
                <priceParmVal></priceParmVal>
            </pricingRuleEligibility>
        </healthPlanPricingRuleData>
    </productHealthPlanMessage>
    <toDoRetry>
        <retryDateTime></retryDateTime>
        <numberOfRetries></numberOfRetries>
        <currentErrorState></currentErrorState>
        <isRetried></isRetried>
    </toDoRetry>
</schema>
```

Sample Health Product and Plan Inbound Message for Health Product Setup

Using the below example, you can do the following:

- Create the health product in the ORMB system through the health product and plan inbound message.

Health Product Code	Description	Product Type	Bundled Product	Start Date	Status	Division
HPMP444	HP Medicare Plus	EPO	N	2021-01-01	ACTIVE	TX

```
<schema>
    <bo>C1-HCProdHlthPlnInbound</bo>
```

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```
    <messageType>C1-HCPRODHLTHPLN-INB-MSG-TYPE</messageType>
    <sourceSystem>NSC</sourceSystem>
    <externalTransactionId>889977</externalTransactionId>
    <externalBatchId>737373</externalBatchId>
    <externalSourceId>373737</externalSourceId>
    <productHealthPlanMessage>
        <HealthProductData>
            <healthProductCode>HPMP444</healthProductCode>
            <description>HP MEDICARE PLUS</description>
            <productType>EPO</productType>
            <productSubType>FSA</productSubType>
            <productHCCategory>MED</productHCCategory>
            <productAdministration>PBM Agency</productAdministration>
            <productLOB>INDIVIDUAL</productLOB>
            <productLOBCategory>GOVERNMENT</productLOBCategory>
            <bundledProduct>N</bundledProduct>
            <startDate>2021-01-01</startDate>
            <endDate>2021-12-01</endDate>
            <status>ACTIVE</status>
            <productCharacteristics>
                <characteristicType>MP-CLAIM</characteristicType>
                <characteristicValue>Y</characteristicValue>
                <effectiveDate>2021-01-01</effectiveDate>
            </productCharacteristics>
            <healthProductDivision>
                <division>TX</division>
            </healthProductDivision>
        </HealthProductData>
    </productHealthPlanMessage>
</schema>
```

Note: We have given the above sample to illustrate how the tags should be nested while sending an inbound message from the external system. However, you should not seamlessly use this sample in your environment because the required pre-requisite data may not be available in your environment. In such case, the system will give erroneous results.

Sample Health Product and Plan Inbound Message for Health Plan Setup

Using the below example, you can do the following:

- Create the health plan for the product in the ORMB system through the health product and health plan inbound message.

The following table provides sample data for a health product and health plan that you can process through the health product and plan inbound message:

Health Product Code	Health Plan Code	HiOS ID	Description	Start Date	Status
HPMP444	HMCSP01	HIOSHLPNMS001	Health Plan Medicare Surplus	2021-02-01	ACTIVE
HPMP444	HMCDP01	HIOSHLPNMD005	Health Plan Medicare Dental	2021-03-01	ACTIVE

```
<schema>
    <bo>C1-HCProdHlthPlnInbound</bo>
    <messageType>C1-HCPRODHLTHPLN-INB-MSG-TYPE</messageType>
    <sourceSystem>NSC</sourceSystem>
    <externalTransactionId>889977</externalTransactionId>
    <externalBatchId>737373</externalBatchId>
    <externalSourceId>373737</externalSourceId>
```

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```
    <healthPlanData>
        <healthProductCode>HPMP444</healthProductCode>
        <healthPlanCode>HMCSP01</healthPlanCode>
        <hiosId>HIOSHLPNMS001</hiosId>
        <description>HEALTH PLAN MEDICARE SURPLUS</description>
        <charitablePlan>N</charitablePlan>
        <standardPlan>Y</standardPlan>
        <acaQhp>Y</acaQhp>
        <grandFatherPlan>Y</grandFatherPlan>
        <ancillaryBenefits>Y</ancillaryBenefits>
        <riderBenefits>N</riderBenefits>
        <addOnPlan>N</addOnPlan>
        <startDate>2021-02-01</startDate>
        <endDate>2021-11-30</endDate>
        <status>ACTIVE</status>
        <healthPlanCharacteristics>
           <characteristicType>ZZ-BNBLA</characteristicType>
           <characteristicValue>DRCT</characteristicValue>
           <effectiveDate>2021-02-01</effectiveDate>
        </healthPlanCharacteristics>
        <healthPlanCharacteristics>
           <characteristicType>ZZ-DISPA</characteristicType>
           <characteristicValue>CRCB</characteristicValue>
           <effectiveDate>2021-02-10</effectiveDate>
        </healthPlanCharacteristics>
        <healthPlanPricingRuleTypes>
           <pricingRuleType>AGE_BASED</pricingRuleType>
        </healthPlanPricingRuleTypes>
        <healthPlanPricingRuleTypes>
           <pricingRuleType>ANCILLARY</pricingRuleType>
        </healthPlanPricingRuleTypes>
    </healthPlanData>
    <healthPlanData>
        <healthProductCode>HPMP444</healthProductCode>
        <healthPlanCode>HMCDP01</healthPlanCode>
        <hiosId>HIOSHLPNMD005</hiosId>
        <description>HEALTH PLAN MEDICARE DENTAL</description>
        <charitablePlan>N</charitablePlan>
        <standardPlan>N</standardPlan>
        <acaQhp>Y</acaQhp>
        <grandFatherPlan>N</grandFatherPlan>
        <ancillaryBenefits>Y</ancillaryBenefits>
        <riderBenefits>N</riderBenefits>
        <addOnPlan>Y</addOnPlan>
        <startDate>2021-02-01</startDate>
        <endDate>2021-10-31</endDate>
        <status>ACTIVE</status>
        <healthPlanCharacteristics>
           <characteristicType>ZZ-BNBLA</characteristicType>
           <characteristicValue>DRCT</characteristicValue>
           <effectiveDate>2021-02-01</effectiveDate>
        </healthPlanCharacteristics>
        <healthPlanCharacteristics>
           <characteristicType>ZZ-DISPA</characteristicType>
           <characteristicValue>CRCB</characteristicValue>
           <effectiveDate>2021-02-10</effectiveDate>
        </healthPlanCharacteristics>
        <healthPlanPricingRuleTypes>
           <pricingRuleType>AGE_BASED</pricingRuleType>
        </healthPlanPricingRuleTypes>
        <healthPlanPricingRuleTypes>
           <pricingRuleType>DISCOUNT</pricingRuleType>
        </healthPlanPricingRuleTypes>
    </healthPlanData>
```

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```
</schema>
```

Note: We have given the above sample to illustrate how the tags should be nested while sending an inbound message from the external system. However, you should not seamlessly use this sample in your environment because the required pre-requisite data may not be available in your environment. In such case, the system will give erroneous results.

Sample Health Product and Plan Inbound Message for Health Plan Pricing Rules Setup

Using the below example, you can do the following:

- Create the age-based pricing rule for the **RET_DENT** health plan -
  The following table provides sample data for an age-based pricing rule of the health plan:

		Base Rate			Pricing Parameter		Modifier Information		
Health Plan	**Pricing Rule Type**	**Base Fee**	**Lower Age Limit**	**Upper Age Limit**	**Parameter**	**Parameter Value**	**Modifier**	**Modifier Value**	**Modifier Rate**
RET_DENT	AGE_BASED	100	1	20	TOBAC	Y	SMOKER	N	10
		300	1	40	TOBAC	Y	SMOKER	N	20
		500	1	60	TOBAC	Y	SMOKER	N	30

- Create the discount charge pricing rule for the **RET_DENT** health plan -
  The following table provides sample data for a discount charge pricing rule of the health plan:

Health Plan	**Pricing Rule Type**	**Base Fee**	**Modifier**	**Modifier Value**	**Modifier Rate**
RET_DENT	DISCOUNT_CHARGE	50	VP_BAND	VP1	10
		70	M_BAND	M1	20
		90	IC_BAND	IC1	30

```
<schema>
    <bo>C1-HCProdHlthPlnInbound</bo>
    <messageType>C1-HCPRODHLTHPLN-INB-MSG-TYPE</messageType>
    <sourceSystem>NSC</sourceSystem>
    <externalTransactionId>889977</externalTransactionId>
    <externalBatchId>737373</externalBatchId>
    <externalSourceId>373737</externalSourceId>
    <healthPlanData>
        <healthProductCode>HPROD_505</healthProductCode>
        <healthPlanCode>RET_DENT</healthPlanCode>
        <description>RETIREE DENTAL HEALTH PLAN</description>
        <charitablePlan>N</charitablePlan>
        <standardPlan>Y</standardPlan>
        <acaQhp>Y</acaQhp>
        <grandFatherPlan>Y</grandFatherPlan>
        <ancillaryBenefits>Y</ancillaryBenefits>
        <riderBenefits>N</riderBenefits>
        <addOnPlan>N</addOnPlan>
        <hiosId></hiosId>
        <startDate>2021-01-01</startDate>
        <endDate>2021-12-31</endDate>
        <status>ACTIVE</status>
        <healthPlanCharacteristics>
           <characteristicType>ZZ-BNBLA</characteristicType>
           <characteristicValue>DRCT</characteristicValue>
           <effectiveDate>2021-01-01</effectiveDate>
        </healthPlanCharacteristics>
        <healthPlanPricingRuleTypes>
```

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```
            <pricingRuleType>AGE_BASED</pricingRuleType>
        </healthPlanPricingRuleTypes>
        <healthPlanPricingRuleTypes>
            <pricingRuleType>DISCOUNT_CHARGE</pricingRuleType>
        </healthPlanPricingRuleTypes>
    </healthPlanData>
    <healthPlanPricingRuleData>
        <sequence>1</sequence>
        <entityIdentifiers>
            <entityIdentifiersList>
                <entityIdentifierType>HLPN</entityIdentifierType>
                <entityIdentifierValue>RET_DENT</entityIdentifierValue>
            </entityIdentifiersList>
        </entityIdentifiers>
        <pricingRuleType>AGE_BASED</pricingRuleType>
        <priceItemCd>AGE</priceItemCd>
        <status>ACTIVE</status>
        <startDate>2021-01-01</startDate>
        <endDate>2021-31-01</endDate>
        <rateOption>ZZAGE</rateOption>
        <pricingType>FLAT</pricingType>
        <modifierApplicability>Y</modifierApplicability>
        <modifierMethod>EXPT</modifierMethod>
        <baseRate>
            <sequence>1</sequence>
            <baseFee>100</baseFee>
            <lowerAgeLimit>1</lowerAgeLimit>
            <upperAgeLimit>20</upperAgeLimit>
            <pricingParameter>
                <sequence>1</sequence>
                <parameterCode>TOBAC</parameterCode>
                <parameterValue>Y</parameterValue>
            </pricingParameter>
            <modifierInformation>
                <sequence>1</sequence>
                <parameterCode>SMOKER</parameterCode>
                <parameterValue>N</parameterValue>
                <rate>10</rate>
            </modifierInformation>
        </baseRate>
        <characteristics>
            <characteristicsList>
                <characteristicType>ZZ-DISP</characteristicType>
                <characteristicValue>DRCT</characteristicValue>
                <effectiveDate>2021-04-01</effectiveDate>
            </characteristicsList>
        </characteristics>
        <pricingRuleEligibility>
            <sequence>1</sequence>
            <priceParmCode>ORA_EMP</priceParmCode>
            <priceParmVal>Y</priceParmVal>
        </pricingRuleEligibility>
        <pricingRuleEligibility>
            <sequence>2</sequence>
            <priceParmCode>MEMSTATE</priceParmCode>
            <priceParmVal>NY</priceParmVal>
        </pricingRuleEligibility>
    </healthPlanPricingRuleData>
    <healthPlanPricingRuleData>
        <sequence>2</sequence>
        <entityIdentifiers>
            <entityIdentifiersList>
                <entityIdentifierType>HLPN</entityIdentifierType>
                <entityIdentifierValue>RET_DENT</entityIdentifierValue>
```

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```
            </entityIdentifiersList>
        </entityIdentifiers>
        <pricingRuleType>AGE_BASED</pricingRuleType>
        <priceItemCd>AGE</priceItemCd>
        <status>ACTIVE</status>
        <startDate>2021-01-01</startDate>
        <endDate>2021-12-31</endDate>
        <rateOption>ZZAGE</rateOption>
        <pricingType>FLAT</pricingType>
        <modifierApplicability>Y</modifierApplicability>
        <modifierMethod>EXPT</modifierMethod>
        <baseRate>
            <sequence>1</sequence>
            <baseFee>300</baseFee>
            <lowerAgeLimit>1</lowerAgeLimit>
            <upperAgeLimit>40</upperAgeLimit>
            <pricingParameter>
                <sequence>1</sequence>
                <parameterCode>TOBAC</parameterCode>
                <parameterValue>Y</parameterValue>
            </pricingParameter>
            <modifierInformation>
                <sequence>1</sequence>
                <parameterCode>SMOKER</parameterCode>
                <parameterValue>N</parameterValue>
                <rate>20</rate>
            </modifierInformation>
        </baseRate>
        <characteristics>
            <characteristicsList>
                <characteristicType>ZZ-BLAGM</characteristicType>
                <characteristicValue>BRCT</characteristicValue>
                <effectiveDate>2021-01-01</effectiveDate>
            </characteristicsList>
        </characteristics>
        <pricingRuleEligibility>
            <sequence>1</sequence>
            <priceParmCode>ORA_EMP</priceParmCode>
            <priceParmVal>Y</priceParmVal>
        </pricingRuleEligibility>
        <pricingRuleEligibility>
            <sequence>2</sequence>
            <priceParmCode>MEMSTATE</priceParmCode>
            <priceParmVal>TX</priceParmVal>
        </pricingRuleEligibility>
    </healthPlanPricingRuleData>
    <healthPlanPricingRuleData>
        <sequence>3</sequence>
        <entityIdentifiers>
            <entityIdentifiersList>
                <entityIdentifierType>HLPN</entityIdentifierType>
                <entityIdentifierValue>RET_DENT</entityIdentifierValue>
            </entityIdentifiersList>
        </entityIdentifiers>
        <pricingRuleType>AGE_BASED</pricingRuleType>
        <priceItemCd>AGE</priceItemCd>
        <status>ACTIVE</status>
        <startDate>2021-01-01</startDate>
        <endDate>2021-12-31</endDate>
        <rateOption>ZZAGE</rateOption>
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        <modifierMethod>EXPT</modifierMethod>
        <baseRate>
```

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        </characteristics>
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            <priceParmVal>Y</priceParmVal>
        </pricingRuleEligibility>
        <pricingRuleEligibility>
            <sequence>2</sequence>
            <priceParmCode>MEMSTATE</priceParmCode>
            <priceParmVal>OH</priceParmVal>
        </pricingRuleEligibility>
    </healthPlanPricingRuleData>
</schema>
```

Note: We have given the above sample to illustrate how the tags should be nested while sending an inbound message from the external system. However, you should not seamlessly use this sample in your environment because the required pre-requisite data may not be available in your environment. In such case, the system will give erroneous results.

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Inbound Message Type

Oracle Revenue Management and Billing allows you to define an inbound message type using which you can create an inbound message through an inbound web service. The following table describes the significance of the respective inbound message type:

Inbound Message Type	Helps the system to determine...
Health Care Inbound Message Type (C1-HCInboundMsgType)	• **Inbound Message Business Object** - The business object using which the health care inbound message should be created in the system. • **Customer Registration Type** - The customer registration type using which the customer registration object should be created through a health care inbound message.
Health Product Health Plan Inbound Message Type (C1-HCProdHlthPlnInboundTyp)	• **Inbound Message Business Object** - The business object using which the health product and plan inbound message should be created in the system. • **Health Product Business Object** - The business object using which the health product should be created in the system. • **Health Plan Business Object** - The business object using which the health plan should be created in the system.
Individual Inbound Message Type (C1-IndHCInboundMsgType)	• **Inbound Message Business Object** - The business object using which the health care inbound message should be created in the system. • **Person Business Object** - The business object using which the individual customer should be created in the system. • **Account Business Object** - The business object using which the individual customer's account should be created in the system. • **Individual Membership Business Object** - The business object using which the individual membership should be created in the system. • **Benefits Business Object** - The business object using which the individual membership benefits should be created in the system. • **Address Business Object** - The business object using which the address should be created in the system. • **Statement Construct Business Object** - The business object using which the statement construct should be created in the system.

The **Inbound Message Type** screen allows you to define, edit, copy, and delete an inbound message type. It contains the following zones:

- Inbound Message Type List on page 2663
- Inbound Message Type on page 2664

Inbound Message Type List

The **Inbound Message Type List** zone lists the inbound message types that are already defined in the system. It contains the following columns:

Column Name	Column Description
Inbound Message Type	Displays the inbound message type.
Description	Displays the description of the inbound message type.

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Column Name	Column Description
Edit	On clicking the **Edit** (✎) icon, the **Inbound Message Type** screen appears where you can edit the details of the inbound message type.
Duplicate	On clicking the **Duplicate** (⧉) icon, the **Inbound Message Type** screen appears where you can define a new inbound message type using an existing inbound message type.
Delete	On clicking the **Delete** (🗑) icon, you can delete the inbound message type.
	Note: You can delete an inbound message type when an inbound message is not created using the inbound message type.

On clicking the **Broadcast** (📡) icon corresponding to an inbound message type, the **Inbound Message Type** zone appears with the details of the respective inbound message type.

Related Topics

For more information on...	See...
How to edit an inbound message type	Editing an Inbound Message Type on page 2672
How to copy an inbound message type	Copying an Inbound Message Type on page 2675
How to delete an inbound message type	Deleting an Inbound Message Type on page 2678
How to view the details of an inbound message type	Viewing the Inbound Message Type Details on page 2667

Inbound Message Type

The **Inbound Message Type** zone displays the details of the inbound message type. It contains the following sections:

- **Main** - This section displays basic information about the inbound message type. It contains the following fields:

Field Name	Field Description
Inbound Message Type	Displays the inbound message type.
Customer Registration Type	Indicates the customer registration type using which the customer registration object is created through a health care inbound message.
	Note: It has a link. On clicking the link, the **Customer Registration Type** screen appears where you can view the details of the respective customer registration type. This field appears when you are viewing the details of an inbound message type which is created using the **C1-HCInboundMsgType** business object.
Inbound Message Business Object	Indicates the business object using which the inbound message is created. In addition, a context menu appears corresponding to this field which helps in navigating to other screens in the application.
	Note: It has a link. On clicking the link, the **Business Object** screen appears where you can view the details of the respective business object.

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Field Name	Field Description
Healthcare Product Business Object	Indicates the business object using which the health product is created through a health product and plan inbound message. In addition, a context menu appears corresponding to this field which helps in navigating to other screens in the application. **Note:** It has a link. On clicking the link, the **Business Object** screen appears where you can view the details of the respective business object. This field appears when you are viewing the details of an inbound message type which is created using the **C1-HCProdHlthPlnInboundTyp** business object.
Health Plan Business Object	Indicates the business object using which the health plan is created through a health product and plan inbound message. In addition, a context menu appears corresponding to this field which helps in navigating to other screens in the application. **Note:** It has a link. On clicking the link, the **Business Object** screen appears where you can view the details of the respective business object. This field appears when you are viewing the details of an inbound message type which is created using the **C1-HCProdHlthPlnInboundTyp** business object.
Description	Displays the description of the inbound message type.
Status	Indicates the status of the inbound message type. The valid values are: • Active • Inactive
Detailed Description	Displays additional information about the inbound message type.

- **Additional Data** - This section lists the additional information about the inbound message type. This section appears when you are viewing the details of an inbound message type which is created using the **C1-IndHCInboundMsgType** business object. It contains the following fields:

Field Name	Field Description
Person Business Object	Indicates the business object using which the individual customer is created through a health care inbound message. **Note:** It has a link. On clicking the link, the **Business Object** screen appears where you can view the details of the respective business object.
Account Business Object	Indicates the business object using which the individual customer's account is created through a health care inbound message. **Note:** It has a link. On clicking the link, the **Business Object** screen appears where you can view the details of the respective business object.
Individual Membership Business Object	Indicates the business object using which the individual membership is created through a health care inbound message.

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Field Name	Field Description
	Note: It has a link. On clicking the link, the **Business Object** screen appears where you can view the details of the respective business object.
Benefits Business Object	Indicates the business object using which the individual membership benefit is created through a health care inbound message.
	Note: It has a link. On clicking the link, the **Business Object** screen appears where you can view the details of the respective business object.
Address Business Object	Indicates the business object using which the address is created through a health care inbound message.
	Note: It has a link. On clicking the link, the **Business Object** screen appears where you can view the details of the respective business object.
Statement Construct Business Object	Indicates the business object using which the statement construct is created through a health care inbound message.
	Note: It has a link. On clicking the link, the **Business Object** screen appears where you can view the details of the respective business object.

- **Characteristics** - This section lists the characteristics defined for the inbound message type. It contains the following columns:

Column Name	Column Description
Characteristic Type	Indicates the characteristic type.
Characteristic Value	Displays the value of the characteristic type.

- **Record Actions** - This section contains the following buttons:

Button Name	Button Description
Edit	Used to edit the details of the inbound message type.
Delete	Used to delete the inbound message type.
	Note: You can delete an inbound message type when an inbound message is not created using the inbound message type.
Duplicate	Used to create a new inbound message type using an existing inbound message type.

- **Record Information** - This section contains the following field:

Field Name	Field Description
Business Object	Indicates the business object using which the inbound message type is created. In addition, a context menu appears corresponding to this field which helps in navigating to other screens in the application.
	Note: It has a link. On clicking the link, the **Business Object** screen appears where you can view the details of the respective business object.

By default, the **Inbound Message Type** zone does not appear in the **Inbound Message Type** screen. It appears when you click the **Broadcast** (📡) icon corresponding to an inbound message type in the **Inbound Message Type List** zone.

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Related Topics

For more information on...	See...
How to edit an inbound message type	Editing an Inbound Message Type on page 2672
How to copy an inbound message type	Copying an Inbound Message Type on page 2675
How to delete an inbound message type	Deleting an Inbound Message Type on page 2678
How to view the details of an inbound message type	Viewing the Inbound Message Type Details on page 2667

Viewing the Inbound Message Type Details

Procedure

To view the details of an inbound message type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **I** and then click **Inbound Message Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Inbound Message Type** sub-menu.
   The **Inbound Message Type** screen appears.
4. In the **Inbound Message Type List** zone, click the **Broadcast** (📡) icon corresponding to the inbound *m*essage type whose details you want to view.
   The **Inbound Message Type** zone appears.
5. View the details of the inbound message type in the **Inbound Message Type** zone.

Related Topics

For more information on...	See...
Inbound Message Type screen	Inbound Message Type on page 2663
Inbound Message Type List zone	Inbound Message Type List on page 2663
Inbound Message Type zone	Inbound Message Type on page 2664

Defining an Inbound Message Type

Prerequisites

The following table lists the prerequisites for defining various inbound message types:

If you want to define a..	Then, you should have...
Health Care Inbound Message Type	• Health care inbound message type business object defined in the application • Health care inbound message business object defined in the application • Customer registration types defined in the application

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If you want to define a..	Then, you should have...
Health Product and Plan Inbound Message Type	• Health product and plan inbound message type business object defined in the application • Health product and plan inbound message business object defined in the application • Health product business object defined in the application • Health plan business object defined in the application
Individual Inbound Message Type	• Health care inbound message type business object defined in the application • Health care inbound message business object defined in the application • Required person, account, individual membership, membership benefit, address, and statement construct business objects defined in the application

Procedure

To define an inbound message type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **I** and then click **Inbound Message Type**.
   A sub-menu appears.
3. Click the **Add** option from the **Inbound Message Type** sub-menu.

   The **Select Business Object** screen appears. It contains the following field:

Field Name	Field Description	Mandatory (Yes or No)
Inbound Message Type Business Object	Used to indicate the business object using which you want to create the inbound message type. The following table lists the business objects using which you can create the respective inbound message type: **Inbound Message Type** / **Business Object** Health Care Inbound Message Type / C1-HCInboundMsgType Health Product and Plan Inbound Message Type / C1-HCProdHlthPlnInbound Individual Inbound Message Type / C1-IndHCInboundMsgType	Yes

4. Select the required business object to create the respective inbound message type.
5. Click **OK**.

   The **Inbound Message Type** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details about the inbound message type. This section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Inbound Message Type	Used to specify the inbound message type.	Yes
Business Object	Indicates the business object using which you are defining the inbound message type.	Not applicable

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Field Name	Field Description	Mandatory (Yes or No)
Customer Registration Type	Used to indicate the customer registration type using which you want to create the customer registration object through a health care inbound message. **Note:** This field appears when you are defining an inbound message type using the **C1-HCInboundMsgType** business object. While creating a health care inbound message type for the fully-insured group health insurance business, you must use a customer registration type where the **Approval Required**, **Final Approval Required**, and **Manual Billing Hierarchy and Pricing** options are not selected. However, while creating a health care inbound message type for the self-funded health insurance business, you must use a customer registration type where the **Final Approval Required** and **Manual Billing Hierarchy and Pricing** options are selected, but the **Approval Required** option is not selected.	Yes
Inbound Message Business Object	Used to indicate the business object using which you want to create the respective inbound message.	Yes
Health Product Business Object	Used to indicate the business object using which you want to create a health product through a health product and plan inbound message. **Note:** This field appears when you are defining a health product and plan inbound message type using the **C1-HCProdHlthPlnInbound** business object.	Yes
Health Plan Business Object	Used to indicate the business object using which you want to create a health plan through a health product and plan inbound message. **Note:** This field appears when you are defining a health product and plan inbound message type using the **C1-HCProdHlthPlnInbound** business object.	Yes
Description	Used to specify the description for the inbound message type.	Yes
Status	Used to indicate the status of the inbound message type. The valid values are: • Active • Inactive	Yes
Detailed Description	Used to specify additional information about the inbound message type.	No

- **Additional Data** - Used to specify additional details about the inbound message type. This section appears when you are specifying the details of an inbound message type which is created using the **C1-IndHCInboundMsgType** business object. This section contains the following fields:

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Field Name	Field Description	Mandatory (Yes or No)
Person Business Object	Used to indicate the business object using which you want to create an individual customer through a health care inbound message. **Note:** This field appears when you are defining a health care inbound message type using the **C1-IndHCInboundMsgType** business object.	Yes
Account Business Object	Used to indicate the business object using which you want to create an individual customer's account through a health care inbound message. **Note:** This field appears when you are defining a health care inbound message type using the **C1-IndHCInboundMsgType** business object.	Yes
Individual Membership Business Object	Used to indicate the business object using which you want to create an individual membership through a health care inbound message. **Note:** This field appears when you are defining a health care inbound message type using the **C1-IndHCInboundMsgType** business object.	Yes
Benefits Business Object	Used to indicate the business object using which you want to create an individual membership benefit through a health care inbound message. **Note:** This field appears when you are defining a health care inbound message type using the **C1-IndHCInboundMsgType** business object.	Yes
Address Business Object	Used to indicate the business object using which you want to create an address through a health care inbound message. **Note:** This field appears when you are defining a health care inbound message type using the **C1-IndHCInboundMsgType** business object.	Yes
Statement Construct Business Object	Used to indicate the business object using which you want to create an statement construct through a health care inbound message. **Note:** This field appears when you are defining a health care inbound message type using the **C1-IndHCInboundMsgType** business object.	Yes

Tip: Alternatively, you can access this screen by clicking the **Add** button in the **Page Title** area of the **Inbound Message Type** screen.

- **Characteristics** - Used to define the characteristics for the inbound message type.

6. Enter the required details in the **Main** section.

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7. Enter the required details in the **Additional Data** section.
8. Define characteristics for the inbound message type, if required.
9. Click **Save**.
   The inbound message type is defined.

Related Topics

For more information on...	See...
Inbound Message Type screen	Inbound Message Type on page 2663
How to define a characteristic for an inbound message type	Defining a Characteristic for an Inbound Message Type on page 2671

Defining a Characteristic for an Inbound Message Type

Prerequisites

To define a characteristic for an inbound message type, you should have:

- Characteristic types defined in the application (where the characteristic entity is set to **Inbound Message Type**)

Procedure

To define a characteristic for an inbound message type:

1. Ensure that the **Characteristics** section is expanded when you are defining, editing, or copying an inbound *m*essage type.

   The **Characteristics** section contains the following fields in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Characteristic Type	Used to indicate the characteristic type.	Yes (Conditional)
	Note: The list includes only those characteristic types where the characteristic entity is set to **Inbound Message Type**.	**Note:** This field is required while defining a characteristic for the inbound message type.
Characteristic Value	Used to specify the value for the characteristic type.	Yes (Conditional)
	Note: If you select a predefined characteristic type, the **Search** (🔍) icon appears corresponding to the **Characteristic Value** field. On clicking the **Search** icon, the **Predefined Characteristic Search** window appears. On specifying the value for a predefined characteristic type, the description of the characteristic value appears corresponding to the **Characteristic Value** field.	**Note:** This field is required while defining a characteristic for the inbound message type.

2. Enter the required details in the **Characteristics** section.
3. If you want to define more than one characteristic for the inbound message type, click the **Add** (+) icon and *t*hen repeat step 2.

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Note: However, if you want to remove a characteristic from the inbound message type, click the **Delete** (🗑) icon corresponding to the characteristic.

Related Topics

For more information on...	See...
How to define an inbound message type	Defining an Inbound Message Type on page 2667
How to edit an inbound message type	Editing an Inbound Message Type on page 2672
How to copy an inbound message type	Copying an Inbound Message Type on page 2675

Editing an Inbound Message Type

Prerequisites

The following table lists the prerequisites for editing various inbound message types:

If you want to define a..	Then, you should have...
Health Care Inbound Message Type	• Health care inbound message type business object defined in the application • Health care inbound message business object defined in the application • Customer registration types defined in the application
Health Product and Plan Inbound Message Type	• Health product and plan inbound message type business object defined in the application • Health product and plan inbound message business object defined in the application • Health product business object defined in the application • Health plan business object defined in the application
Individual Inbound Message Type	• Health care inbound message type business object defined in the application • Health care inbound message business object defined in the application • Required person, account, individual membership, membership benefit, address, and statement construct business objects defined in the application

Procedure

To edit an inbound message type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **I** and then click **Inbound Message Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Inbound Message Type** sub-menu.
   The **Inbound Message Type** screen appears.
4. In the **Inbound Message Type List** zone, click the **Edit** (✎) icon in the **Edit** column corresponding to the *I*nbound message type whose details you want to edit.

   The **Inbound Message Type** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details about the inbound message type. This section contains the following fields:

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Field Name	Field Description	Mandatory (Yes or No)
Inbound Message Type	Displays the inbound message type.	Not applicable
Business Object	Indicates the business object which is used while defining the inbound message type.	Not applicable
Customer Registration Type	Used to indicate the customer registration type using which you want to create the customer registration object through a health care inbound message. **Note:** This field appears when you are defining an inbound message type using the **C1-HCInboundMsgType** business object. While creating a health care inbound message type for the fully-insured group health insurance business, you must use a customer registration type where the **Approval Required**, **Final Approval Required**, and **Manual Billing Hierarchy and Pricing** options are not selected. However, while creating a health care inbound message type for the self-funded health insurance business, you must use a customer registration type where the **Final Approval Required** and **Manual Billing Hierarchy and Pricing** options are selected, but the **Approval Required** option is not selected.	Yes
Inbound Message Business Object	Used to indicate the business object using which you want to create the respective inbound message.	Yes
Health Product Business Object	Used to indicate the business object using which you want to create a health product through a health product and plan inbound message. **Note:** This field appears when you are defining a health product and plan inbound message type using the **C1-HCProdHlthPlnInbound** business object.	Yes
Health Plan Business Object	Used to indicate the business object using which you want to create a health plan through a health product and plan inbound message. **Note:** This field appears when you are defining a health product and plan inbound message type using the **C1-HCProdHlthPlnInbound** business object.	Yes
Description	Used to specify the description for the inbound message type.	Yes
Status	Used to indicate the status of the inbound message type. The valid values are: • Active • Inactive	Yes

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Field Name	Field Description	Mandatory (Yes or No)
Detailed Description	Used to specify additional information about the inbound message type.	No

- **Additional Data** - Used to specify additional details about the inbound message type. This section appears when you are specifying the details of an inbound message type which is created using the **C1-IndHCInboundMsgType** business object. This section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Person Business Object	Used to indicate the business object using which you want to create an individual customer through a health care inbound message. **Note:** This field appears when you are defining a health care inbound message type using the **C1-IndHCInboundMsgType** business object.	Yes
Account Business Object	Used to indicate the business object using which you want to create an individual customer's account through a health care inbound message. **Note:** This field appears when you are defining a health care inbound message type using the **C1-IndHCInboundMsgType** business object.	Yes
Individual Membership Business Object	Used to indicate the business object using which you want to create an individual membership through a health care inbound message. **Note:** This field appears when you are defining a health care inbound message type using the **C1-IndHCInboundMsgType** business object.	Yes
Benefits Business Object	Used to indicate the business object using which you want to create an individual membership benefit through a health care inbound message. **Note:** This field appears when you are defining a health care inbound message type using the **C1-IndHCInboundMsgType** business object.	Yes
Address Business Object	Used to indicate the business object using which you want to create an address through a health care inbound message. **Note:** This field appears when you are defining a health care inbound message type using the **C1-IndHCInboundMsgType** business object.	Yes
Statement Construct Business Object	Used to indicate the business object using which you want to create an statement construct through a health care inbound message.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	Note: This field appears when you are defining a health care inbound message type using the **C1-IndHCInboundMsgType** business object.	

- **Characteristics** - Used to define the characteristics for the inbound message type.

Tip: Alternatively, you can edit the details of an inbound message type by clicking the **Edit** button in the **Inbound Message Type** zone.

5. Modify the required details in the **Main** and **Additional Data** section, if required.
6. Define, edit, or remove characteristics of the inbound message type, if required.
7. Click **Save**.
   The changes made to the inbound message type are saved.

Related Topics

For more information on...	See...
Inbound Message Type screen	Inbound Message Type on page 2663
Inbound Message Type List zone	Inbound Message Type List on page 2663
Inbound Message Type zone	Inbound Message Type on page 2664
How to define a characteristic for an inbound message type	Defining a Characteristic for an Inbound Message Type on page 2671

Copying an Inbound Message Type

Instead of creating an inbound message type from scratch, you can create a new inbound message type using an existing inbound message type. This is possible through copying an inbound message type. On copying an inbound message type, the details including the characteristics are copied to the new inbound message type. You can then edit the details, if required.

Prerequisites

The following table lists the prerequisites for copying various inbound message types:

If you want to define a..	Then, you should have...
Health Care Inbound Message Type	• Health care inbound message type business object defined in the application • Health care inbound message business object defined in the application • Customer registration types defined in the application
Health Product and Plan Inbound Message Type	• Health product and plan inbound message type business object defined in the application • Health product and plan inbound message business object defined in the application • Health product business object defined in the application • Health plan business object defined in the application
Individual Inbound Message Type	• Health care inbound message type business object defined in the application • Health care inbound message business object defined in the application

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If you want to define a..	Then, you should have...
	• Required person, account, individual membership, membership benefit, address, and statement construct business objects defined in the application

Procedure

To copy an inbound message type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **I** and then click **Inbound Message Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Inbound Message Type** sub-menu.
   The **Inbound Message Type** screen appears.
4. In the **Inbound Message Type List** zone, click the **Duplicate** (⧉) icon in the **Duplicate** column corresponding to the inbound message type whose copy you want to create.

   The **Inbound Message Type** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details about the inbound message type. This section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Inbound Message Type	Used to specify the inbound message type.	Yes
Business Object	Indicates the business object which is used while defining the inbound message type.	Not applicable
Customer Registration Type	Used to indicate the customer registration type using which you want to create the customer registration object through a health care inbound message. **Note:** This field appears when you are defining an inbound message type using the **C1-HCInboundMsgType** business object. While creating a health care inbound message type for the fully-insured group health insurance business, you must use a customer registration type where the **Approval Required**, **Final Approval Required**, and **Manual Billing Hierarchy and Pricing** options are not selected. However, while creating a health care inbound message type for the self-funded health insurance business, you must use a customer registration type where the **Final Approval Required** and **Manual Billing Hierarchy and Pricing** options are selected, but the **Approval Required** option is not selected.	Yes
Inbound Message Business Object	Used to indicate the business object using which you want to create the respective inbound message.	Yes
Health Product Business Object	Used to indicate the business object using which you want to create a health product through a health product and plan inbound message.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	Note: This field appears when you are defining a health product and plan inbound message type using the **C1-HCProdHlthPlnInbound** business object.	
Health Plan Business Object	Used to indicate the business object using which you want to create a health plan through a health product and plan inbound message. **Note:** This field appears when you are defining a health product and plan inbound message type using the **C1-HCProdHlthPlnInbound** business object.	Yes
Description	Used to specify the description for the inbound message type.	Yes
Status	Used to indicate the status of the inbound message type. The valid values are: • Active • Inactive	Yes
Detailed Description	Used to specify additional information about the inbound message type.	No

- **Additional Data** - Used to specify additional details about the inbound message type. This section appears when you are specifying the details of an inbound message type which is created using the **C1-IndHCInboundMsgType** business object. This section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Person Business Object	Used to indicate the business object using which you want to create an individual customer through a health care inbound message. **Note:** This field appears when you are defining a health care inbound message type using the **C1-IndHCInboundMsgType** business object.	Yes
Account Business Object	Used to indicate the business object using which you want to create an individual customer's account through a health care inbound message. **Note:** This field appears when you are defining a health care inbound message type using the **C1-IndHCInboundMsgType** business object.	Yes
Individual Membership Business Object	Used to indicate the business object using which you want to create an individual membership through a health care inbound message. **Note:** This field appears when you are defining a health care inbound message type using the **C1-IndHCInboundMsgType** business object.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
Benefits Business Object	Used to indicate the business object using which you want to create an individual membership benefit through a health care inbound message. **Note:** This field appears when you are defining a health care inbound message type using the **C1-IndHCInboundMsgType** business object.	Yes
Address Business Object	Used to indicate the business object using which you want to create an address through a health care inbound message. **Note:** This field appears when you are defining a health care inbound message type using the **C1-IndHCInboundMsgType** business object.	Yes
Statement Construct Business Object	Used to indicate the business object using which you want to create an statement construct through a health care inbound message. **Note:** This field appears when you are defining a health care inbound message type using the **C1-IndHCInboundMsgType** business object.	Yes

- **Characteristics** - Used to define the characteristics for the inbound message type.

Tip: Alternatively, you can copy an inbound message type by clicking the **Duplicate** button in the **Inbound Message Type** zone.

5. Enter the required details in the **Main** and **Additional Data** section.
6. Define, edit, or remove characteristics of the inbound message type, if required.
7. Click **Save**.
   The new inbound message type is defined.

Related Topics

For more information on...	See...
Inbound Message Type screen	Inbound Message Type on page 2663
Inbound Message Type List zone	Inbound Message Type List on page 2663
Inbound Message Type zone	Inbound Message Type on page 2664
How to define a characteristic for an inbound message type	Defining a Characteristic for an Inbound Message Type on page 2671

Deleting an Inbound Message Type

Procedure

To delete an inbound message type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.

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2. From the **Admin** menu, select **I** and then click **Inbound Message Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Inbound Message Type** sub-menu.
   The **Inbound Message Type** screen appears.
4. In the **Inbound Message Type List** zone, click the **Delete** (🗑) icon in the **Delete** column corresponding to the *I*nbound message type that you want to delete.
   A message appears confirming whether you want to delete the inbound message type.

   Note: You can delete an inbound message type when an inbound message is not created using the inbound message type.

   Tip: Alternatively, you can delete an inbound message type by clicking the **Delete** button in the **Inbound Message Type** zone.
5. Click **OK**.
   The inbound message type is deleted.

Related Topics

For more information on...	See...
Inbound Message Type screen	Inbound Message Type on page 2663
Inbound Message Type List zone	Inbound Message Type List on page 2663
Inbound Message Type zone	Inbound Message Type on page 2664

Inbound Message (Used for Searching)

The **Inbound Message** screen allows you to search for an inbound message using various search criteria. It contains the following zone:

- Search Inbound Message on page 2679

Through this screen, you can navigate to the following screen:

- Inbound Message (Used for Viewing) on page 2685

Search Inbound Message

The **Search Inbound Message** zone allows you to search for an inbound message using various search criteria. It contains the following two sections:

- **Search Criteria** - The **Search Criteria** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Search By	Used to indicate whether you want to search for an inbound message using the inbound message or person details. The valid values are: • Message Details • Person Details **Note:** By default, the **Message Details** option is selected.	Yes
Inbound Message ID	Used to search a particular inbound message.	No

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Field Name	Field Description	Mandatory (Yes or No)
	Note: This field appears when the **Message Details** option is selected from the **Search By** list.	
Person ID	Used to search inbound messages through which a particular parent customer or bill group and their related entities are created in the system. **Note:** The **Search** (🔍) icon appears corresponding to the **Person ID** field. On clicking the **Search** icon, the **Person Search** window appears. This field appears when the **Person Details** option is selected from the **Search By** list. This field is only applicable for the fully-insured group and self-funded businesses. This field can only be used to search inbound messages through which a person of the following person types is created in the system: • Parent Customer • Bill Group	Yes
Status	Used to search inbound messages with a particular status. The valid values are: • Pending • Processed • Rejected • Voided **Note:** This field appears when the **Message Details** option is selected from the **Search By** list.	No
Source System	Used to search inbound messages which are received from a particular external system. **Note:** This field appears when the **Message Details** option is selected from the **Search By** list.	No
Created From	Used to search inbound messages which are created from a particular date onwards. **Note:** This field appears when the **Message Details** option is selected from the **Search By** list.	No
External Source ID	Used to search inbound messages which are received from a particular external source system. **Note:** This field appears when the **Message Details** option is selected from the **Search By** list.	No

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Field Name	Field Description	Mandatory (Yes or No)
Created To	Used to search inbound messages which are created till a particular date. **Note:** This field appears when the **Message Details** option is selected from the **Search By** list.	No
External Transaction ID	Used to search the inbound message which was a result of a particular transaction in the external source system. **Note:** This field appears when the **Message Details** option is selected from the **Search By** list.	No
User ID	Used to search inbound messages which are created by a particular user. **Note:** This field appears when the **Message Details** option is selected from the **Search By** list.	No
External Batch ID	Used to search inbound messages which are created through a particular batch job. **Note:** This field appears when the **Message Details** option is selected from the **Search By** list.	No
Inbound Message Type	Used to search inbound messages which are created using a particular inbound message type. **Note:** This field appears when the **Message Details** option is selected from the **Search By** list.	No

Note: You must specify at least one search criterion while searching for an inbound message.

- **Search Results** - On clicking the **Search** button, the search results appear based on the specified search criteria. The **Search Results** section contains the following columns:

Column Name	Column Description
Creation Date	Displays the date when the inbound message is created in the system.
Inbound Message Information	Displays information about the inbound message. **Note:** It has a link. On clicking the link, the **Inbound Message** screen appears where you can view the details of the respective inbound message.
Status	Indicates the status of the inbound message. The valid values are: • Pending • Processed • Rejected • Voided
Inbound Message Type	Indicates the inbound message type using which the inbound message is created.
Source System	Indicates the source system from where the inbound message is received.

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Column Name	Column Description
External Transaction ID	Indicates the transaction in the external source system which resulted in the inbound message.
External Source ID	Displays the external source system ID.
External Batch ID	Indicates the batch job in the external source system through which the inbound message is created.
Person Information	Indicates the person whose record is created or updated in the system through the inbound message. In addition, this column has a context menu which helps in navigating to other screens in the application.
	Note: It has a link. On clicking the link, the **Person** screen appears where you can view the details of the respective person. This column appears when the **Person Details** option is selected from the **Search By** list.
Created By	Indicates the user who has created the inbound message.
	Note: This column appears when the **Message Details** option is selected from the **Search By** list.

Note: Pagination is used to display limited number of records in the **Search Results** section. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

Related Topics

For more information on...	See...
How to search for an inbound message	Searching for an Inbound Message on page 2682
How to view the details of an inbound message	Viewing the Inbound Message Details on page 2685

Searching for an Inbound Message

Prerequisites

To search for an inbound message, you should have:

- Inbound message types defined in the application
- Values defined for the **C1-SourceSystemLookup** extendable lookup
- Person identifier types defined in the application

Procedure

To search for an inbound message:

1. Click the **Menu** link in the **Application** toolbar.
   A list appears.
2. From the **Main** menu, select **Integration** and then click **Inbound Message**.
   The **Inbound Message** screen appears.
3. Enter the search criteria in the **Search Inbound Message** zone.

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> **Note:** ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.

4. Click **Search**.
   A list of inbound messages that meet the search criteria appears in the **Search Results** section.

Related Topics

For more information on...	See...
Inbound Message screen	Inbound Message (Used for Searching) on page 2679
Search Inbound Message zone	Search Inbound Message on page 2679

Creating an Inbound Message

The following table lists the different types of inbound messages that you can create through the respective inbound web service:

Inbound Message	Inbound Web Service
Health Care Inbound Message on page 2274	C1-HCInboundMessage on page 2683
Health Product and Plan Inbound Message on page 2632	C1-HCProdHlthPlnInboundMessage on page 2684
	C1-HCProdHlthPlnInboundMes on page 2684

You cannot create the above inbound messages from the user interface. However, you can define, edit, and remove a characteristic from the above inbound messages from the user interface. You can delete and submit the above inbound messages for validation and processing from the user interface and through a batch process.

C1-HCInboundMessage

The **C1-HCInboundMessage** inbound web service is a SOAP based Web service which can be used for the self-funded, fully-insured group, and fully-insured individual businesses. It enables you to create or update a parent customer, bill group, individual customer and their account, self-funded or fully-insured group policy, policy plan, group or individual membership, group or individual membership benefits, and statement constructs. It allows you to define and edit pricing rules for the fully-insured group business. It allows you to create or update a pass-through billable charge for a fully-insured group policy. It allows you to terminate, reinstate, or renew a fully-insured group policy. It also allows you to terminate an individual membership.

On calling the **C1-HCInboundMessage** inbound web service, a health care inbound message is created in the **Pending** status. A health care inbound message goes through various statuses in its lifecycle. You can search for a health care inbound message through the **Inbound Message** screen.

Before calling the **C1-HCInboundMessage** inbound web service, you need to ensure that the prerequisites are setup as mentioned in Prerequisites on page 2282.

Related Topics

For more information on...	See...
Inbound Message screen	Inbound Message (Used for Searching) on page 2679

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For more information on...	See...
Health Care Inbound Message Status Transition through User Interface	Health Care Inbound Message Status Transition through User Interface on page 2286
Health Care Inbound Message Status Transition through a Batch Process	Health Care Inbound Message Status Transition through a Batch Process on page 2286

C1-HCProdHlthPlnInboundMessage

The **C1-HCProdHlthPlnInboundMessage** inbound web service is a SOAP based Web service which can be used for the fully-insured individual business. It enables you to create or update a health product, health plan and a pricing rule for a health plan.

On calling the **C1-HCProdHlthPlnInboundMessage** inbound web service, a health product and plan inbound message is created in the **Pending** status. A health product and plan inbound message goes through various statuses in its lifecycle. You can search for a health product and plan inbound message through the **Inbound Message** screen.

Before calling the **C1-HCProdHlthPlnInboundMessage** inbound web service, you need to ensure that the prerequisites are setup as mentioned in Prerequisites on page 2633.

Related Topics

For more information on...	See...
Inbound Message screen	Inbound Message (Used for Searching) on page 2679
Health Product and Plan Inbound Message Status Transition through User Interface	Health Product and Plan Inbound Message Status Transition through a Batch Process on page 2635
Health Product and Plan Inbound Message Status Transition through a Batch Process	Health Product and Plan Inbound Message Status Transition through User Interface on page 2634

C1-HCProdHlthPlnInboundMes

The **C1-HCProdHlthPlnInboundMes** inbound web service is a REST based Web service which can be used for the fully-insured individual business It enables you to create or update a health product, health plan and a pricing rule for a health plan.

On calling the **C1-HCProdHlthPlnInboundMes** inbound web service, a health product and plan inbound message is created in the **Pending** status. A health product and plan inbound message goes through various statuses in its lifecycle. You can search for a health product and plan inbound message through the **Inbound Message** screen.

Before calling the **C1-HCProdHlthPlnInboundMes** based inbound web service, you need to ensure that the prerequisites are setup as mentioned in Prerequisites on page 2633.

Related Topics

For more information on...	See...
Inbound Message screen	Inbound Message (Used for Searching) on page 2679
Health Product and Plan Inbound Message Status Transition through User Interface	Health Product and Plan Inbound Message Status Transition through User Interface on page 2634

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For more information on...	See...
Health Product and Plan Inbound Message Status Transition through a Batch Process	Health Product and Plan Inbound Message Status Transition through a Batch Process on page 2635

Viewing the Inbound Message Details

Procedure

To view the details of an inbound message:

1. Search for the inbound message in the **Inbound Message** screen.
2. In the **Search Results** section, click the link in the **Inbound Message Information** column corresponding to *t*he inbound message whose details you want to view.
   The **Inbound Message** screen appears.
3. Ensure that the **Main** tab is selected.
4. View the details of the inbound message in the **Inbound Message** zone.

Related Topics

For more information on...	See...
How to search for an inbound message	Searching for an Inbound Message on page 2682
Inbound Message screen	Inbound Message (Used for Viewing) on page 2685
Inbound Message zone	Inbound Message on page 2686

Inbound Message (Used for Viewing)

Once an inbound message is created, the **Inbound Message** screen allows you to:

- View the details of the inbound message
- Edit the details of the inbound message
- Delete the inbound message
- Submit the inbound message for validation and processing
- Resubmit the inbound message for validation and processing on failure
- Void the inbound message
- View the content of the inbound message
- View the log of the inbound message
- Add a log entry for the inbound message

The **Inbound Message** screen contains the following tabs:

- Inbound Message - Main on page 2685
- Inbound Message - Message on page 2687
- Inbound Message - Log on page 2688

Inbound Message - Main

The **Main** tab displays information about the inbound message. It contains the following zone:

- Inbound Message on page 2686

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Inbound Message

The **Inbound Message** zone displays the details of the inbound message. It contains the following sections:

- **Main** - Displays basic information about the inbound message. It contains the following fields:

Field Name	Field Description
Inbound Message Information	Displays information about the inbound message.
Status	Indicates the status of the inbound message. The valid values are: • Pending • Processed • Rejected • Voided
Inbound Message Type	Indicates the inbound message type using which the inbound message is created. **Note:** It has a link. On clicking the link, the **Inbound Message Type** screen appears where you can view the details of the respective inbound message type.
Source System	Indicates the external source system from where the inbound message is received.
External Transaction ID	Indicates the transaction in the external source system which resulted in the inbound message.
External Batch ID	Indicates the external batch job through which the inbound message is created.
External Source ID	Displays the external source system ID.
Person	Indicates the person specified in the inbound message. **Note:** It has a link. On clicking the link, the **Person** screen appears where you can view the details of the respective person. This field appears when the **Person Details** option is selected from the **Search By** list in the **Search Inbound Message** zone.

- **Characteristics** - Lists the characteristics defined for the inbound message. It contains the following columns:

Column Name	Column Description
Effective Date	Displays the date from when the characteristic is effective for the inbound message.
Characteristic Type	Indicates the characteristic type.
Characteristic Value	Displays the value of the characteristic type.

- **Record Actions** - This section contains the following buttons:

Button Name	Button Description
Edit	Used to define, edit, or remove characteristics of the inbound message. **Note:** The **Edit** button appears when the inbound message is in the **Pending** or **Rejected** status.
Delete	Used to delete the inbound message.

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Button Name	Button Description
	Note: The **Delete** button appears when the inbound message is in the **Pending** status.
Submit for Processing	Used to submit the inbound message for validation and processing.
	Note: The **Submit for Processing** button appears only when the inbound message is in the **Pending** status.
Retry	Used when you want to change the status of the inbound message from **Rejected** to **Pending** so that the inbound message can be considered once again for validation and processing.
	Note: The **Retry** button appears when the inbound message is in the **Rejected** status.
Void	Used to cancel the inbound message.
	Note: The **Void** button appears when the inbound message is in the **Rejected** status.

- **Record Information** - This section contains the following fields:

Field Name	Field Description
Business Object	Indicates the business object using which the inbound message is created. In addition, a context menu appears corresponding to this field which helps in navigating to other screens in the application.
	Note: It has a link. On clicking the link, the **Business Object** screen appears where you can view the details of the respective business object.
Status Date/Time	Displays the date and time when the status of the inbound message is updated.
Create Date/Time	Displays the date and time when the inbound message is created.

Related Topics

For more information on...	See...
How to view the inbound message details	Viewing the Inbound Message Details on page 2685

Inbound Message - Message

The **Message** tab displays the content of the inbound message in the XML format. It contains the following zone:

- Inbound Message Content on page 2687

Inbound Message Content

The **Inbound Message Content** zone displays the content of the inbound message in the XML format. By default, each tag in the inbound message is expanded. You can collapse the tag whenever required.

For more information about the tags, refer to the respective XML format section:

Inbound Message	XML Format
Health Care Inbound Message	Health Care Inbound Message XML Format on page 2290

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Inbound Message	XML Format
Health Product and Plan Inbound Message	Health Product and Plan Inbound Message XML Format on page 2639

Once the inbound message is validated and processed either from the user interface or through a batch process, the following tags appear at the bottom of the inbound message in the **Inbound Message Content** zone:

Tag Name	Tag Description
toDoRetry	Displays the information about the retry option used for the inbound message.
retryDateTime	Displays the date and time when the retry option is used to change the status of the inbound message from **Rejected** to **Pending**.
numberOfRetries	Indicates the number of times the retry option is used for the inbound message.
currentErrorState	Indicates the status to which the inbound message is transitioned when its validation or processing fails. The valid value is: • REJECTED
isRetried	Indicates whether the retry option is used to change the status of the inbound message. The valid values are: • true • false

Related Topics

For more information on...	See...
How to view the content of an inbound message	Viewing the Content of an Inbound Message on page 2694

Inbound Message - Log

The **Log** tab contains the following zone:

- Inbound Message Log on page 2688

Inbound Message Log

The **Inbound Message Log** zone lists the complete trail of actions performed on the inbound message. It contains the following columns:

Column Name	Column Description
Creation Date/Time	Displays the date and time when the action was performed on the inbound message.
Details	Displays the details about the action performed on the inbound message.
User	Indicates the user who has performed the action on the inbound message.
Log Type	Indicates the type of log.
Related Object	Indicates the object or entity which is created when the action is performed on the inbound message.
Status Reason	Indicates the reason why the status of the inbound message is changed.

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Column Name	Column Description
	Note: At present, no data appears in this column. The implementation team can build the custom logic to meet the business requirements.

Note: You can manually add a log entry for the inbound message by clicking the **Add Log Entry** link in the upper right corner of the **Inbound Message Log** zone.

Related Topics

For more information on...	See...
How to view the log of an inbound message	Viewing the Log of an Inbound Message on page 2695
How to add a log entry for an inbound message	Adding a Log Entry for an Inbound Message on page 2695

Editing an Inbound Message

Procedure

To edit an inbound message:

1. Search for the inbound message in the **Inbound Message** screen.
2. In the **Search Results** section, click the link in the **Inbound Message Information** column corresponding *t*o the inbound message whose details you want to edit.
   The **Inbound Message** screen appears.
3. Ensure that the **Main** tab is selected.
4. Click the **Edit** button in the **Inbound Message** zone.

   The **Inbound Message** screen appears. It contains the following sections:

   - **Main** - Displays the basic information about the inbound message. It contains the following fields:

Field Name	Field Description
Inbound Message Information	Displays information about the inbound message.
Inbound Message Type	Indicates the inbound message type using which the inbound message is created.
Source System	Indicates the source system from where the inbound message is received.
External Transaction ID	Indicates the transaction in the external source system which resulted in the inbound message.
External Batch ID	Indicates the batch job in the external source system through which the inbound message is created.
External Source ID	Displays the external source system ID.

   - **Characteristics** - Used to define, edit, or remove characteristics of the inbound message.

   Note: The **Edit** button appears when the inbound message is in the **Pending** or **Rejected** status.

5. Define, edit, or remove characteristics of the inbound message, if required.
6. Click **Save**.
   The changes made to the inbound message are saved.

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Related Topics

For more information on...	See...
How to search for an inbound message	Searching for an Inbound Message on page 2682
Inbound Message screen	Inbound Message (Used for Viewing) on page 2685
Inbound Message zone	Inbound Message on page 2686
How to define a characteristic for an inbound message	Defining a Characteristic for an Inbound Message on page 2690

Defining a Characteristic for an Inbound Message

Prerequisites

To define a characteristic for an inbound message, you should have:

- Characteristic types defined in the application (where the characteristic entity is set to **Inbound Message**)

Procedure

To define a characteristic for an inbound message:

1. Ensure that the **Characteristics** section is expanded when you are editing an inbound message.

   The **Characteristics** section contains the following fields in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Effective Date	Used to specify the date from when the characteristic is effective for the inbound message.	Yes (Conditional) **Note:** This field is required when you are defining a characteristic for the inbound message.
Characteristic Type	Used to indicate the characteristic type. **Note:** The list includes only those characteristic types where the characteristic entity is set to **Inbound Message**.	Yes (Conditional) **Note:** This field is required when you are defining a characteristic for the inbound message.
Characteristic Value	Used to specify the value for the characteristic type. **Note:** If you select a predefined characteristic type, the **Search** (🔍) icon appears corresponding to the **Characteristic Value** field. On clicking the **Search** icon, the **Predefined Characteristic Search** window appears. On specifying the value for a predefined characteristic type, the description of the characteristic value appears corresponding to the **Characteristic Value** field.	Yes (Conditional) **Note:** This field is required when you are defining a characteristic for the inbound message.

2. Enter the required details in the **Characteristics** section.

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3. If you want to define more than one characteristic for the inbound message, click the **Add** (+) icon and *t*hen repeat step 2.

> **Note:** However, if you want to remove a characteristic from the inbound message, click the **Delete** (🗑) icon corresponding to the characteristic.

4. Click **Save**.
   The characteristics are defined for the inbound message.

Related Topics

For more information on...	See...
How to edit an inbound message	Editing an Inbound Message on page 2689

Deleting an Inbound Message

There might be situations when incorrect inbound messages are received in the system. In such case, the system provides you with an ability to delete the inbound message when it is not yet validated or processed. Note that you can delete an inbound message when the inbound message is in the **Pending** status.

Procedure

To delete an inbound message:

1. Search for the inbound message in the **Inbound Message** screen.
2. In the **Search Results** section, click the link in the **Inbound Message Information** column corresponding *t*o the inbound message that you want to delete.
   The **Inbound Message** screen appears.
3. Ensure that the **Main** tab is selected.
4. Click the **Delete** button in the **Inbound Message** zone.
   A message appears confirming whether you want to delete the inbound message.

> **Note:** The **Delete** button appears when the inbound message is in the **Pending** status.

5. Click **OK**.
   The inbound message is deleted.

Related Topics

For more information on...	See...
How to search for an inbound message	Searching for an Inbound Message on page 2682
Inbound Message screen	Inbound Message (Used for Viewing) on page 2685
Inbound Message zone	Inbound Message on page 2686

Processing an Inbound Message

Prerequisites

The following table lists the prerequisites which you should setup before processing the respective inbound message:

Inbound Message	Refer to...
Health Care Inbound Message	Prerequisites on page 2282

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Inbound Message	Refer to...
Health Product and Plan Inbound Message	Prerequisites on page 2633

Procedure

To process an inbound message:

1. Search for the inbound message in the **Inbound Message** screen.
2. In the **Search Results** section, click the link in the **Inbound Message Information** column corresponding *t*o the inbound message that you want to submit for validation and processing.
   The **Inbound Message** screen appears.
3. Ensure that the **Main** tab is selected.
4. Click the **Submit for Processing** button in the **Inbound Message** zone.

   The status of the inbound message is changed to **Validation** and the algorithms attached to the **Validation** status are invoked in the specified sequence. If the validation is successful, the status of the inbound message is changed to **Processing** and the algorithms attached to the **Processing** status are invoked in the specified sequence. The following table lists how the system behaves when the respective inbound message is processed:

If the inbound message is a...	Then...
Health Care Inbound Message	Creates or updates a person, account and fully-insured group or self-funded policy. It creates or updates a policy plan, membership, and pass-through billable charge for a fully-insured group policy. In addition, if requested, it terminates, reinstates, or renews a fully-insured group policy. Finally, the status of the inbound message is changed to **Processed**. The system uses the **C1-PERSTYPE** feature configuration to decide whether the person type specified in the health care inbound message represents **Parent Customer** or **Bill Group**. If the person type specified in the health care inbound message matches the person type specified in the **Bill Group Person Type** or **Parent Person Type** option type of the **C1-PERSTYPE** feature configuration, the system creates or updates the person, account, policy, policy plan, and address through a customer registration object. Note that the memberships, pass-through billable charges, and pricing rules are created directly and not via customer registration object. However, if the person type specified in the health care inbound message does not match the person type specified in the **Bill Group Person Type** or **Parent Person Type** option type, the system creates or updates the person and its other entities directly and not through a customer registration object. In this case, the system only refers the customer registration type for the business objects using which the person, account, policy plan, membership, and address should be created or updated in the system. If the derivation and pricing parameters are specified for a bill group, the system automatically creates one sort record for the bill group. Here, the sort ID is set to the bill group ID. The start and end dates of the sort record are set to the bill group and parent customer's relationship start and end dates. Once the sort record is created, the system creates the derivation and pricing parameters for the bill group and sort ID combination.
Health Product and Plan Inbound Message	Creates or updates a health product, health plan, and pricing rules for individual memberships. In addition, it also maintains a log of the entities that are either added or updated through the health product and plan inbound message. Note that the system allows to upload the health product, health plan, and pricing rules together in a single inbound message or by creating

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If the inbound message is a...	Then...
	three separate inbound messages. Finally, the status of the inbound message is changed to **Processed**. The system uses the **C1-HLTPRDVAL** algorithm to validate the uploaded data through the health product and plan inbound message. Once the data is successfully validated, entities like health product, health plan, and pricing rules are created in the system.

However, if the validation or processing fails due to any reason, the status of the inbound message is changed to **Rejected** and the algorithms attached to the **Rejected** status are invoked in the specified sequence. A To Do is created using the To Do type specified in the **C1-TDCRINMSG** algorithm and assigned to the users with the To Do role specified in the **C1-TDCRINMSG** algorithm.

Note: The **Submit for Processing** button appears when the inbound message is in the **Pending** status.

Related Topics

For more information on...	See...
How to search for an inbound message	Searching for an Inbound Message on page 2682
Inbound Message screen	Inbound Message (Used for Viewing) on page 2685
Inbound Message zone	Inbound Message on page 2686

Using the Retry Option for an Inbound Message

If the validation or processing fails due to any reason, the status of the inbound message is changed to **Rejected**. The system enables you to resubmit the inbound messages for validation and processing on failure. However, to resubmit the inbound message for validation and processing, you need to change the status of the inbound message from **Rejected** to **Pending**. This is possible through using the **Retry** option.

Procedure

To use the retry option for an inbound message:

1. Search for the inbound message in the **Inbound Message** screen.
2. In the **Search Results** section, click the link in the **Inbound Message Information** column corresponding *t*o the inbound message for which you want to use the retry option.
   The **Inbound Message** screen appears.
3. Ensure that the **Main** tab is selected.
4. Ensure that the To Dos created for the inbound message are in the **Complete** status.
5. Click the **Retry** button in the **Inbound Message** zone.
   The status of the inbound message is changed to **Pending**.

Note: The **Retry** button appears when the inbound message is in the **Rejected** status.

Related Topics

For more information on...	See...
How to search for an inbound message	Searching for an Inbound Message on page 2682
Inbound Message screen	Inbound Message (Used for Viewing) on page 2685

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For more information on...	See...
Inbound Message zone	Inbound Message on page 2686

Voiding an Inbound Message

There might be situations when incorrect inbound messages are received in the system. In such case, the system provides you with an ability to void or cancel the inbound message after the validation or processing fails. Note that you can void or cancel an inbound message when the inbound message is in the **Rejected** status.

Procedure

To void an inbound message:

1. Search for the inbound message in the **Inbound Message** screen.
2. In the **Search Results** section, click the link in the **Inbound Message Information** column corresponding *t*o the inbound message that you want to void.
   The **Inbound Message** screen appears.
3. Ensure that the **Main** tab is selected.
4. Click the **Void** button in the **Inbound Message** zone.
   The status of the inbound message is changed to **Voided**.

Note: The **Void** button appears when the inbound message is in the **Rejected** status.

Related Topics

For more information on...	See...
How to search for an inbound message	Searching for an Inbound Message on page 2682
Inbound Message screen	Inbound Message (Used for Viewing) on page 2685
Inbound Message zone	Inbound Message on page 2686

Viewing the Content of an Inbound Message

Procedure

To view the content of an inbound message:

1. Search for the inbound message in the **Inbound Message** screen.
2. In the **Search Results** section, click the link in the **Inbound Message Information** column corresponding *t*o the inbound message whose details you want to view.
   The **Inbound Message** screen appears.
3. Click the **Message** tab.
   The **Message** tab appears.
4. View the content of the inbound message in the XML format in the **Inbound Message Content** zone.

Related Topics

For more information on...	See...
How to search for an inbound message	Searching for an Inbound Message on page 2682
Inbound Message screen	Inbound Message (Used for Viewing) on page 2685

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For more information on...	See...
Inbound Message Content zone	Inbound Message Content on page 2687

Viewing the Log of an Inbound Message

Procedure

To view the log of an inbound message:

1. Search for the inbound message in the **Inbound Message** screen.
2. In the **Search Results** section, click the link in the **Inbound Message Information** column corresponding *t*o the inbound message whose log you want to view.
   The **Inbound Message** screen appears.
3. Click the **Log** tab.
   The **Log** tab appears.
4. View the complete trail of actions performed on the inbound message in the **Inbound Message Log** zone.

Related Topics

For more information on...	See...
How to search for an inbound message	Searching for an Inbound Message on page 2682
Inbound Message screen	Inbound Message (Used for Viewing) on page 2685
Inbound Message Log zone	Inbound Message Log on page 2688
How to add a log entry for an inbound message	Adding a Log Entry for an Inbound Message on page 2695

Adding a Log Entry for an Inbound Message

Procedure

To add a log entry for an inbound message:

1. Search for the inbound message in the **Inbound Message** screen.
2. In the **Search Results** section, click the link in the **Inbound Message Information** column corresponding *t*o the inbound message for which you want to add a log entry.
   The **Inbound Message** screen appears.
3. Click the **Log** tab.
   The **Log** tab appears.
4. Click the **Add Log Entry** link in the upper right corner of the **Inbound Message Log** zone.

   The **Add Inbound Message Log** window appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Inbound Message Information	Displays information about the inbound message.	Not applicable
Log Details	Used to specify additional comments for the inbound message.	Yes

5. Enter the comments in the **Log Details** field.
6. Click **Save**.

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The log entry is added in the **Inbound Message Log** zone.

Related Topics

For more information on...	See...
How to search for an inbound message	Searching for an Inbound Message on page 2682
Inbound Message screen	Inbound Message (Used for Viewing) on page 2685
Inbound Message Log zone	Inbound Message Log on page 2688

Statement Construct Preference

Oracle Revenue Management and Billing enables you to create and edit the statement construct of a person through a health care inbound message. However, note that you can create and edit the statement construct of only those persons through a health care inbound message whose record is created via a customer registration object. While creating or editing a statement construct, the system uses the statement construct business object of the customer registration type which is specified in the respective inbound message type.

If the data is not available in the following tags of a health care inbound message while creating a statement construct for a person, the system uses the default value from the respective attribute of the statement construct preference:

Tag Name	Considers Default Value from the Following Attribute...
statementAddressSource	Default Statement Address Source
effectiveStatus	Default Statement Status
statementCycle	Default Statement Cycle
statementFormat	Default Statement Format
statementRouteType	Default Statement Route Type
numberOfCopies	Default Statement Number of Copies

In addition, if the data is not available in the following tag of a health care inbound message while adding an account or contract in a statement construct, the system uses the default value from the respective attribute of the statement construct preference:

Tag Name	Considers Default Value from the Following Attribute...
printOrder	Default Statement Print Order

The system considers the statement construct preference which is specified in the **Field Mapping** parameter of the **C1-HCINPROC** algorithm. You can define, edit, delete, and copy a statement construct preference through the **Field Mapping** screen.

Related Topics

For more information on...	See...
C1-HCINPROC algorithm	C1-HCINPROC on page 2289

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Searching for a Statement Construct Preference

Prerequisites

To search for a statement construct preference, you should have:

- Values defined in the **FIELD_CAT_FLG** lookup field

Procedure

To search for a statement construct preference:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **F** and then click **Field Mapping**.
   A sub-menu appears.
3. Click the **Search** option from the **Field Mapping** sub-menu.
   The **Field Mapping** screen appears.
4. Select the **Statement Construct** option from the **Preference Category** list.
5. Enter the additional search criteria in the **Search Field Mapping** zone.

> **Note:** ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.

6. Click **Search**.
   A list of statement construct preferences that meet the search criteria appears in the **Search Results** section.

Viewing the Statement Construct Preference Details

Procedure

To view the details of a statement construct preference:

1. Search for the statement construct preference in the **Field Mapping** screen.
2. In the **Search Results** section, click the **Broadcast** (📡) icon corresponding to the statement construct preference whose details you want to view.
   The **Field Mapping** zone appears.
3. View the details of the statement construct preference in the **Field Mapping** zone.

Related Topics

For more information on...	See...
How to search for a statement construct preference	Searching for a Statement Construct Preference on page 2697

Defining a Statement Construct Preference

Prerequisites

To define a statement construct preference, you should have:

- Values defined in the **STM_ADDR_SRC_FLG**, **STM_FORMAT_FLG**, and **MAP_ENTITY_FLG** lookup fields

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- Statement cycles and statement route types defined in the application

Procedure

To define a statement construct preference:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **F** and then click **Field Mapping**.
   A sub-menu appears.
3. Click the **Add** option from the **Field Mapping** sub-menu.

   The **Select Business Object** screen appears. It contains the following field:

Field Name	Field Description	Mandatory (Yes or No)
Field Mapping Business Object	Used to indicate the business object using which you want to create the statement construct preference. The valid values are: • Field Mapping • Medicare Plan Benefit Package • Membership Status Reason Mapping	Yes

Note: Alternatively, you can access the **Select Business Object** screen by clicking the **Add** button in the **Page Title** area of the **Field Mapping** screen.

4. Select the **Field Mapping** option from the **Field Mapping Business Object** list.
5. Click **OK**.

   The **Field Mapping** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details of the statement construct preference. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Preference	Used to specify the statement construct preference.	Yes
Description	Used to specify the description for the statement construct preference.	Yes
Detailed Description	Used to specify additional information about the statement construct preference.	No
Status	Used to indicate the status of the statement construct preference. The valid values are: • Active • Inactive	Yes

   - **Preference Category** - This section contains the following field:

Field Name	Field Description	Mandatory (Yes or No)
Preference Category	Used to indicate the category to which the preference belongs. The valid values are: • Billing • Binder Payment • Geographic Rating Area • Individual Membership • Medicare	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	• Medicare Plan Benefit • Member Reconciliation • Member Relationship and Subscription Tier • Membership Status Reason • Statement Construct	

- **Preference Settings** - Used to set the attributes in the statement construct preference. It contains the following fields in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Attribute	Used to indicate the attribute which you want to set in the statement construct preference. The valid values are: • **Default Statement Address Source** - Used when the address source is not specified while creating a statement construct through a health care inbound message. • **Default Statement Status** - Used when the status is not specified while creating a statement construct through a health care inbound message. • **Default Statement Cycle** - Used when the statement cycle is not specified while creating a statement construct through a health care inbound message. • **Default Statement Format** - Used when the statement format is not specified while creating a statement construct through a health care inbound message. • **Default Statement Route Type** - Used when the statement route type is not specified while creating a statement construct through a health care inbound message. • **Default Statement Number of Copies** - Used when the number of statement copies is not specified while creating a statement construct through a health care inbound message. • **Default Statement Print Order** - Used when the print order is not specified for an account or contract while creating or updating a statement construct through a health care inbound message.	Yes (Conditional) **Note:** This field is required while setting an attribute in the statement construct preference.
Value	Used to specify the attribute value. The attribute value that you can specify varies depending on the attribute you want to set in the statement construct preference: **If the attribute is set to...** / **Then, this field is...** Default Statement Address Source / Used to indicate the source whose address should be used for sending the statements to the person. The valid value is:	Yes (Conditional) **Note:** This field is required while setting an attribute in the statement construct preference.

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<table>
<tr><th>Field Name</th><th>Field Description</th><th>Mandatory (Yes or No)</th></tr>
<tr><td></td><td>
<table>
<tr><th>If the attribute is set to...</th><th>Then, this field is...</th></tr>
<tr><td></td><td>• Person

Note: The list includes only those values which are defined in the STM_ADDR_SRC_FLG lookup field.</td></tr>
<tr><td>Default Statement Status</td><td>Used to indicate the status of the statement construct. The valid values are:
• Active
• Inactive</td></tr>
<tr><td>Default Statement Cycle</td><td>Used to indicate when statements should be generated for the statement construct.

Note: The list includes only those statement cycles which are already defined in the system.</td></tr>
<tr><td>Default Statement Format</td><td>Used to indicate the format in which the statements should be printed. The valid values are:
• Detail
• Summary

Note: The list includes only those values which are defined in the STM_FORMAT_FLG lookup field.</td></tr>
</table>
</td><td></td></tr>
<tr><td></td><td>
<table>
<tr><td>Default Statement Route Type</td><td>Used to indicate how to route the statements to the person.

Note: The list includes only those statement route types which are already defined in the system.</td></tr>
<tr><td>Default Statement Number of Copies</td><td>Used to indicate how many copies of the statement should be sent to the person.</td></tr>
</table>
</td><td></td></tr>
</table>

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Field Name	Field Description		Mandatory (Yes or No)
		Note: You must specify a positive integer for this attribute.	
	Default Statement Print Order	Used to indicate the order in which the financial transactions associated with the account or contract should appear on the printed statement.	
		Note: You must specify a positive integer for this attribute.	
Entity Type	Used to indicate the type of entity for which the attribute is applicable. The valid values are: • Account • Billable Charge		No
	Note: At present, this data is stored for informational purposes only and is not considered in the business logic. If required, you can add more entity types to the **MAP_ENTITY_FLG** lookup field.		

Note: While defining a statement construct preference, you must set at least one attribute in the statement construct preference.

6. Select the **Statement Construct** option from the **Preference Category** list.
7. Enter the required details in the **Main** section.
8. Select the required attribute and value from the respective fields.
9. If you want to set more than one attribute in the statement construct preference, click the **Add** (+) icon and then repeat step 8.

Note: However, if you want to remove an attribute from the statement construct preference, click the **Delete** (🗑) icon corresponding to the attribute.

10. Click **Save**.
    The statement construct preference is defined.

Editing a Statement Construct Preference

Prerequisites

To edit a statement construct preference, you should have:

- Values defined in the **STM_ADDR_SRC_FLG**, **STM_FORMAT_FLG**, and **MAP_ENTITY_FLG** lookup fields
- Statement cycles and statement route types defined in the application

Procedure

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To edit a statement construct preference:

1. Search for the statement construct preference in the **Field Mapping** screen.
2. In the **Search Results** section, click the **Edit** (✎) icon in the **Edit** column *c*orresponding to the statement construct preference whose details you want to edit.

   The **Field Mapping** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details of the statement construct preference. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Preference	Displays the statement construct preference.	Not applicable
Description	Used to specify the description for the statement construct preference.	Yes
Detailed Description	Used to specify additional information about the statement construct preference.	No
Status	Used to indicate the status of the statement construct preference. The valid values are: • Active • Inactive	Yes
Preference Category	Indicates the category to which the preference belongs. The valid value is: • Statement Construct	Not applicable

   - **Preference Settings** - Used to set the attributes in the statement construct preference. It contains the following fields in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Attribute	Used to indicate the attribute which you want to set in the statement construct preference. The valid values are: • **Default Statement Address Source** - Used when the address source is not specified while creating a statement construct through a health care inbound message. • **Default Statement Status** - Used when the status is not specified while creating a statement construct through a health care inbound message. • **Default Statement Cycle** - Used when the statement cycle is not specified while creating a statement construct through a health care inbound message. • **Default Statement Format** - Used when the statement format is not specified while creating a statement construct through a health care inbound message. • **Default Statement Route Type** - Used when the statement route type is not specified while creating a statement construct through a health care inbound message. • **Default Statement Number of Copies** - Used when the number of statement copies is not	Yes (Conditional) **Note:** This field is required while setting an attribute in the statement construct preference.

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<table>
<tr><th>Field Name</th><th>Field Description</th><th>Mandatory (Yes or No)</th></tr>
<tr><td></td><td>specified while creating a statement construct through a health care inbound message.
• Default Statement Print Order - Used when the print order is not specified for an account or contract while creating or updating a statement construct through a health care inbound message.</td><td></td></tr>
<tr><td>Value</td><td>Used to specify the attribute value. The attribute value that you can specify varies depending on the attribute you want to set in the statement construct preference:
<table>
<tr><th>If the attribute is set to...</th><th>Then, this field is...</th></tr>
<tr><td>Default Statement Address Source</td><td>Used to indicate the source whose address should be used for sending the statements to the person. The valid value is:
• Person
Note: The list includes only those values which are defined in the STM_ADDR_SRC_FLG lookup field.</td></tr>
<tr><td>Default Statement Status</td><td>Used to indicate the status of the statement construct. The valid values are:
• Active
• Inactive</td></tr>
<tr><td>Default Statement Cycle</td><td>Used to indicate when statements should be generated for the statement construct.
Note: The list includes only those statement cycles which are already defined in the system.</td></tr>
<tr><td>Default Statement Format</td><td>Used to indicate the format in which the statements should be printed. The valid values are:
• Detail
• Summary</td></tr>
</table></td><td>Yes (Conditional)
Note: This field is required while setting an attribute in the statement construct preference.</td></tr>
</table>

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<table>
<tr><th>Field Name</th><th>Field Description</th><th>Mandatory (Yes or No)</th></tr>
<tr><td></td><td>
<table>
<tr><th>If the attribute is set to...</th><th>Then, this field is...</th></tr>
<tr><td></td><td>Note: The list includes only those values which are defined in the STM_FORMAT_FLG lookup field.</td></tr>
</table>
</td><td></td></tr>
<tr><td></td><td>
<table>
<tr><td>Default Statement Route Type</td><td>Used to indicate how to route the statements to the person.
Note: The list includes only those statement route types which are already defined in the system.</td></tr>
<tr><td>Default Statement Number of Copies</td><td>Used to indicate how many copies of the statement should be sent to the person.
Note: You must specify a positive integer for this attribute.</td></tr>
<tr><td>Default Statement Print Order</td><td>Used to indicate the order in which the financial transactions associated with the account or contract should appear on the printed statement.
Note: You must specify a positive integer for this attribute.</td></tr>
</table>
</td><td></td></tr>
<tr><td>Entity Type</td><td>Used to indicate the type of entity for which the attribute is applicable. The valid values are:
• Account
• Billable Charge
Note: At present, this data is stored for informational purposes only and is not considered in the business logic. If required, you can add more entity types to the MAP_ENTITY_FLG lookup field.</td><td>No</td></tr>
</table>

Tip: Alternatively, you can edit the details of a statement construct preference by clicking the **Edit** button in the **Field Mapping** zone.

3. Modify the required details in the **Main** section.
4. Define, edit, or remove the attribute from the statement construct preference, if required.

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Note: You must set at least one attribute in a statement construct preference.

5. Click **Save**.
   The changes made to the statement construct preference are saved.

Related Topics

For more information on...	See...
How to search for a statement construct preference	Searching for a Statement Construct Preference on page 2697

Copying a Statement Construct Preference

Instead of creating a statement construct preference from scratch, you can create a new statement construct preference using an existing statement construct preference. This is possible through copying a statement construct preference. On copying a statement construct preference, the details including the attributes are copied to the new statement construct preference. You can then edit the details, if required.

Prerequisites

To copy a statement construct preference, you should have:

- Statement construct preference (whose copy you want to create) defined in the application
- Values defined in the **STM_ADDR_SRC_FLG**, **STM_FORMAT_FLG**, and **MAP_ENTITY_FLG** lookup fields
- Statement cycles and statement route types defined in the application

Procedure

To copy a statement construct preference:

1. Search for the statement construct preference in the **Field Mapping** screen.
2. In the **Search Results** section, click the **Duplicate** (⧉) icon in the **Duplicate** column corresponding to the statement construct preference whose copy you want to create.

   The **Field Mapping** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details of the statement construct preference. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Preference	Used to specify the statement construct preference.	Yes
Description	Used to specify the description for the statement construct preference.	Yes
Detailed Description	Used to specify additional information about the statement construct preference.	No
Status	Used to indicate the status of the statement construct preference. The valid values are: • Active • Inactive	Yes
Preference Category	Indicates the category to which the preference belongs. The valid value is: • Statement Construct	Not applicable

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- **Preference Settings** - Used to set the attributes in the statement construct preference. It contains the following fields in a grid:

<table>
<tr><th>Field Name</th><th>Field Description</th><th>Mandatory (Yes or No)</th></tr>
<tr><td>Attribute</td><td>Used to indicate the attribute which you want to set in the statement construct preference. The valid values are:
Default Statement Address Source - Used when the address source is not specified while creating a statement construct through a health care inbound message.
Default Statement Status - Used when the status is not specified while creating a statement construct through a health care inbound message.
Default Statement Cycle - Used when the statement cycle is not specified while creating a statement construct through a health care inbound message.
Default Statement Format - Used when the statement format is not specified while creating a statement construct through a health care inbound message.
Default Statement Route Type - Used when the statement route type is not specified while creating a statement construct through a health care inbound message.
Default Statement Number of Copies - Used when the number of statement copies is not specified while creating a statement construct through a health care inbound message.
Default Statement Print Order - Used when the print order is not specified for an account or contract while creating or updating a statement construct through a health care inbound message.</td><td>Yes (Conditional)
Note: This field is required while setting an attribute in the statement construct preference.</td></tr>
<tr><td>Value</td><td>Used to specify the attribute value. The attribute value that you can specify varies depending on the attribute you want to set in the statement construct preference:<table><tr><th>If the attribute is set to...</th><th>Then, this field is...</th></tr><tr><td>Default Statement Address Source</td><td>Used to indicate the source whose address should be used for sending the statements to the person. The valid value is:
Person
Note: The list includes only those values which are defined in the STM_ADDR_SRC_FLG lookup field.</td></tr></table></td><td>Yes (Conditional)
Note: This field is required while setting an attribute in the statement construct preference.</td></tr>
</table>

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<table>
<tr><th>Field Name</th><th>Field Description</th><th>Mandatory (Yes or No)</th></tr>
<tr><td></td><td>
<table>
<tr><th>If the attribute is set to...</th><th>Then, this field is...</th></tr>
<tr><td>Default Statement Status</td><td>Used to indicate the status of the statement construct. The valid values are:
Active
Inactive</td></tr>
<tr><td>Default Statement Cycle</td><td>Used to indicate when statements should be generated for the statement construct.

Note: The list includes only those statement cycles which are already defined in the system.</td></tr>
<tr><td>Default Statement Format</td><td>Used to indicate the format in which the statements should be printed. The valid values are:
Detail
Summary
Note: The list includes only those values which are defined in the STM_FORMAT_FLG lookup field.</td></tr>
</table>
</td><td></td></tr>
<tr><td></td><td>
<table>
<tr><td>Default Statement Route Type</td><td>Used to indicate how to route the statements to the person.

Note: The list includes only those statement route types which are already defined in the system.</td></tr>
<tr><td>Default Statement Number of Copies</td><td>Used to indicate how many copies of the statement should be sent to the person.

Note: You must specify a positive integer for this attribute.</td></tr>
<tr><td>Default Statement Print Order</td><td>Used to indicate the order in which the financial transactions associated with the account or contract</td></tr>
</table>
</td><td></td></tr>
</table>

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Field Name	Field Description	Mandatory (Yes or No)
	should appear on the printed statement. **Note:** You must specify a positive integer for this attribute.	
Entity Type	Used to indicate the type of entity for which the attribute is applicable. The valid values are: • Account • Billable Charge **Note:** At present, this data is stored for informational purposes only and is not considered in the business logic. If required, you can add more entity types to the **MAP_ENTITY_FLG** lookup field.	No

Note: While defining a statement construct preference, you must set at least one attribute in the statement construct preference.

Tip: Alternatively, you can copy a statement construct preference by clicking the **Duplicate** button in the **Field Mapping** zone.

3. Enter the required details in the **Main** section.
4. Define, edit, or remove the attribute from the statement construct preference, if required.
5. Click **Save**.
   The new statement construct preference is defined.

Related Topics

For more information on...	See...
How to search for a statement construct preference	Searching for a Statement Construct Preference on page 2697

Deleting a Statement Construct Preference

Procedure

To delete a statement construct preference:

1. Search for the statement construct preference in the **Field Mapping** screen.
2. In the **Search Results** section, click the **Delete** (🗑) icon in the **Delete** column corresponding to the statement construct preference that you want to delete.
   A message appears confirming whether you want to delete the statement construct preference.

Tip: Alternatively, you can delete a statement construct preference by clicking the **Delete** button in the **Field Mapping** zone.

3. Click **OK**.
   The statement construct preference is deleted.

Related Topics

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For more information on...	See...
How to search for a statement construct preference	Searching for a Statement Construct Preference on page 2697

Hold Request Preference

The Hold Request Preference enables you to set the attributes that are used during:

- **Manual Hold Request Creation Via Inbound Message** - While manually creating or releasing a hold request via an inbound message, the system uses the following attributes from the hold request preference:
  - Default Manual Hold Reason
  - Default Manual End Date
  - Default Manual Hold Request Type Code
  - Default Manual Release Reason
  - Default Manual Discard Reason
- **Automatic Hold Request Creation Via Inbound Message** - While automatically creating a hold request when the status of an inbound message is changed to **Rejected**, the system uses the following attributes from the hold request preference:
  - Create Automatic Hold Request
  - Default Automatic Hold Reason
  - Default Automatic End Date
  - Default Automatic Hold Request Type Code
  - Characteristic Type for Bill Level 1
  - Characteristic Type for Bill Level 2
  - Characteristic Type for Bill Level 3
  - Characteristic Type for Bill Level 4
- **Automatic Hold Request Creation Via File Upload Interface** – While automatically creating a hold request when a billable charge creation or cancelation fails for an account through the **File Upload Interface** feature, the system uses the following attributes from the hold request preference:
  - Create Premium Hold Request
  - Default Automatic Hold Reason
  - Default Automatic End Date
  - Default Automatic Hold Request Type Code

For more information about these attributes, see Defining a Hold Request Preference.

The system considers the hold request preference which is specified in the **Hold Request Field Mapping** option type of the **C1-HOLDSRCH** feature configuration. You can define, edit, delete, and copy a hold request preference using the **C1-FieldMapping** business object through the **Field Mapping** screen. While creating a hold request preference, you must set the preference category to **Hold Request**.

Searching for a Hold Request Preference

Procedure

To search for a hold request preference:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **F** and then click **Field Mapping**.

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A sub-menu appears.

3. Click the **Search** option from the **Field Mapping** sub-menu.
   The **Field Mapping** screen appears.
4. Select the **Hold Request** option from the **Preference Category** list.
5. Enter the additional search criteria in the **Search Field Mapping** zone.

> **Note:** ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.

6. Click **Search**.
   A list of hold request preferences that meet the search criteria appears in the **Search Results** section.

Viewing the Hold Request Preference Details

Procedure

To view the details of a hold request preference:

1. Search for the hold request preference in the **Field Mapping** screen.
2. In the **Search Results** section, click the **Broadcast** (📡) icon corresponding to the hold request preference whose details you want to view.
   The **Field Mapping** zone appears.
3. View the details of the hold request preference in the **Field Mapping** zone.

Related Topics

For more information on...	See...
How to search for a hold request preference	Searching for a Hold Request Preference on page 2709

Defining a Hold Request Preference

Prerequisites

To define a hold request preference, you should have:

- Field mapping business objects defined in the application.
- Required characteristic types defined in the application (where the characteristic entity is set to **Membership**)
- Values defined in the **HOLD_REASON_FLG** lookup field.
- Required hold request types defined in the application.
- Required reasons defined for the **Discarded** and **Released** statuses of the **C1-HoldRequest** business object in the **Status Reason** screen.

Procedure

To define a hold request preference:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **F** and then click **Field Mapping**.
   A sub-menu appears.

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3. Click the **Add** option from the **Field Mapping** sub-menu.

   The **Select Business Object** screen appears. It contains the following field:

Field Name	Field Description	Mandatory (Yes or No)

Field Mapping Business Object	Used to indicate the business object using which you want to create a hold request preference. The valid values are:
	• **Bill Route Method - Contact Method Mapping (i.e., C1_BillRouteCntMethMap)** - Enables you to maintain a routing method - contact method mapping preference.
	• **Field Mapping (i.e., C1-FieldMapping)** - Enables you to maintain the following:
	  • Automatic Refund/Write-Off Preference
	  • Billing Preference
	  • Binder Payment Preference
	  • Configuration for Match Type - Handling Overpayment Preference
	  • Delinquency Process Preference
	  • Delinquency Process Type Preference
	  • Geographic Rating Area Preference
	  • Individual Membership Preference
	  • Medicare Preference
	  • Member Reconciliation Preference
	  • Member Relationship and Subscription Tier Preference
	  • Membership Repricing Reasons Preference
	  • Statement Construct Preference
	  • Transaction Paid Status Count Preference
	  • Hold Request Preference
	• **Group Membership Status Reason Mapping (i.e., C1-MemStatusReasonMapGroup)** - Enables you to maintain a group membership status reason preference.
	• **Medicare Plan Benefit Package (i.e., C1-BenefitPackage)** - Enables you to maintain a medicare plan benefit package.
	• **Membership Status Reason Mapping (i.e., C1-MemStatusReasonMapping)** - Enables you to maintain an individual membership status reason preference.
	Note: The above business objects are shipped with the product. The list includes those business objects which are created using the **Field Mapping** (i.e., **C1-FIELDMAP**) maintenance object.
		Yes

Note: Alternatively, you can access the **Select Business Object** screen by clicking the **Add** button in the **Page Title** area of the **Field Mapping** screen.

4. Select the **Field Mapping** option from the **Field Mapping Business Object** list.
5. Click **OK**.

   The **Field Mapping** screen appears. It contains the following sections:

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- **Main** - Used to specify basic details for the hold request preference. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Preference	Used to specify the hold request preference.	Yes
Description	Used to specify the description for the hold request preference.	Yes
Detailed Description	Used to specify additional information about the hold request preference. **Note:** You can resize the text box depending on your requirement by clicking the **Resize Handle** (⁄) icon at the bottom right corner of the text box.	No
Status	Used to indicate the status of the hold request preference. The valid values are: • Active • Inactive	Yes

- **Preference Category** - Used to specify the preference category. It contains the following field:

Field Name	Field Description	Mandatory (Yes or No)
Preference Category	Used to indicate the category to which the preference belongs. The valid values are: • Automatic Refund/Write-Off • Billing • Binder Payment • Configuration for Match Type - Handling Overpayment • Delinquency Process • Delinquency Process Type • Geographic Rating Area • Hold Request • Individual Membership • Medicare • Medicare Plan Benefit • Member Reconciliation • Member Relationship and Subscription Tier • Membership Repricing Reasons • Membership Status Reason • Routing Method - Contact Method Mapping • Statement Construct • Transaction Paid Status Count	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The list includes only those values which are defined in the **FIELD_CAT_FLG** lookup field. You must select the **Hold Request** option from the list while creating a hold request preference.	

- **Preference Settings** - Used to set the attributes in the hold request preference. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Attribute	Used to indicate the attribute that you want to set in the hold request preference. **Note:** The attribute list appears only when the preference category is selected from the respective list.	Yes
Value	Used to specify the attribute value. **Note:** The attribute value list appears only when the attribute is selected from the respective list. The attribute value list varies depending on the attribute that you want to set in the hold request preference.	Yes
Entity Type	Used to indicate the type of entity for which the attribute is applicable. The valid values are: • Account • Adjustment • Billable Charge • Membership • Payment • Policy **Note:** At present, this data is stored for informational purposes only and is not considered in the business logic. If required, you can add more entity types in the **MAP_ENTITY_FLG** lookup field.	No

The following table lists and describes the attributes available while defining, editing, or copying the hold request preference:

Attribute	Description	Mandatory (Yes or No)
Characteristic Type for Bill Level 1	Used to specify the characteristic type which stores the bill group derivation and pricing parameter 1 for the membership. The system considers this characteristic type to determine the account to which the group membership is billed. The system	Yes

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Attribute	Description	Mandatory (Yes or No)
	then creates an automatic hold request for the respective billing account via the inbound message. **Note:** You must specify a characteristic type where the characteristic entity is set to **Membership**.	
Characteristic Type for Bill Level 2	Used to specify the characteristic type which stores the bill group derivation and pricing parameter 2 for the membership. The system considers this characteristic type to determine the account to which the group membership is billed. The system then creates an automatic hold request for the respective billing account via the inbound message. **Note:** You must specify a characteristic type where the characteristic entity is set to **Membership**.	Yes
Characteristic Type for Bill Level 3	Used to specify the characteristic type which stores the bill group derivation and pricing parameter 3 for the membership. The system considers this characteristic type to determine the account to which the group membership is billed. The system then creates an automatic hold request for the respective billing account via the inbound message. **Note:** You must specify a characteristic type where the characteristic entity is set to **Membership**.	Yes
Characteristic Type for Bill Level 4	Used to specify the characteristic type which stores the bill group derivation and pricing parameter 4 for the membership. The system considers this characteristic type to determine the account to which the group membership is billed. The system then creates an automatic hold request for the respective billing account via the inbound message. **Note:** You must specify a characteristic type where the characteristic entity is set to **Membership**.	Yes
Create Automatic Hold Request	Used to indicate whether the system should automatically create a hold request whenever the status of an inbound message (with person or account data) is changed to **Rejected**. The valid values are: • Yes • No	Yes
Create Premium Hold Request	Used to indicate whether the system should automatically create a hold request when a billable charge creation or cancelation fails for an account through the **File Upload Interface** feature. The valid values are: • Yes • No	Yes
Default Automatic End Date	Used to specify the date till when you want an automatic hold request to be effective.	Yes

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Attribute	Description	Mandatory (Yes or No)
	Note: The specified date should be later than the date when the automatic hold request is created via an inbound message or file upload interface. You must specify the date in the **YYYY-MM-DD** format.	
Default Automatic Hold Reason	Used to indicate the reason why you want to hold the entity via an automatic hold request. **Note:** The list includes only those values which are defined in the **HOLD_REASON_FLG** lookup field.	Yes
Default Automatic Hold Request Type Code	Used to indicate the hold request type using which you want to create an automatic hold request via an inbound message or file upload interface. **Note:** The list includes only those hold request types which are already defined in the system.	Yes
Default Manual Discard Reason	Used to indicate the reason why you want to discard the hold request via an inbound message. The system considers the default manual discard reason when the **action** tag is set to **R** within the **billHold** tag in an inbound message and the derived hold request's start data is a future date. **Note:** You must specify a reason which is already defined for the **Discarded** status of the **C1-HoldRequest** business object through the **Status Reason** screen.	Yes
Default Manual End Date	Used to specify the date till when you want a manual hold request to be effective. The system considers the default manual end date when the **action** tag is set to **H** or **R** and other hold details are not received within the **billHold** tag in an inbound message. **Note:** The specified date should be later than the date when the manual hold request is created via an inbound message. You must specify the date in the **YYYY-MM-DD** format.	Yes
Default Manual Hold Reason	Used to indicate the reason why you want to hold the entity via a manual hold request. The system considers the default manual hold reason when the **action** tag is set to **H** or **R** and other hold details are not received within the **billHold** tag in an inbound message. **Note:** The list includes only those values which are defined in the **HOLD_REASON_FLG** lookup field.	Yes

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Attribute	Description	Mandatory (Yes or No)
Default Manual Hold Request Type Code	Used to indicate the hold request type using which you want to create a manual hold request via an inbound message. The system considers the default manual hold request type when the **action** tag is set to **H** or **R** and other hold details are not received within the **billHold** tag in an inbound message. **Note:** The list includes only those hold request types which are already defined in the system.	Yes
Default Manual Release Reason	Used to indicate the reason why you want to release the hold request via an inbound message. The system considers the default manual release reason when the **action** tag is set to **R** within the **billHold** tag in an inbound message. **Note:** You must specify a reason which is already defined for the **Released** status of the **C1-HoldRequest** business object through the **Status Reason** screen.	Yes

Note: While defining a hold request preference, you must set at least one attribute in the hold request preference.

6. Select the **Hold Request** option from the **Preference Category** list.
   The **Preference Category** section disappears and the **Preference Category** field appears in the **Main** section.
7. Enter the required details in the **Main** section.
8. Set the required attributes in the hold request preference.
9. If you want to set more than one attribute in the hold request preference, click the **Add** (+) icon and then repeat step 8.

Note: However, if you want to remove an attribute from the hold request preference, click the **Delete** (🗑) icon corresponding to the attribute.

10. Click **Save**.
    The hold request preference is defined.

Related Topics

For more information on...	See...
Manual Hold Request Creation Via Inbound Message	Manual Hold Request Creation Via Inbound Message
Automatic Hold Request Creation Via Inbound Message	Automatic Hold Request Creation Via Inbound Message
Automatic Hold Request Creation Via File Upload Interface	Automatic Hold Request Creation Via File Upload Interface on page 3614

Editing a Hold Request Preference

Prerequisites

To edit a hold request preference, you should have:

- Required characteristic types defined in the application (where the characteristic entity is set to **Membership**)
- Values defined in the **HOLD_REASON_FLG** lookup field.
- Required hold request types defined in the application.

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- Required reasons defined for the **Discarded** and **Released** statuses of the **C1-HoldRequest** business object in the **Status Reason** screen.

Procedure

To edit a hold request preference:

1. Search for the hold request preference in the **Field Mapping** screen.
2. In the **Search Results** section, click the **Edit** (✎) icon in the **Edit** column *c*orresponding to the hold request preference whose details you want to edit.

   The **Field Mapping** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details for the hold request preference. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Preference	Displays the hold request preference.	Not applicable
Description	Used to specify the description for the hold request preference.	Yes
Detailed Description	Used to specify additional information about the hold request preference. **Note:** You can resize the text box depending on your requirement by clicking the **Resize Handle** (⇲) icon at the bottom right corner of the text box.	No
Status	Used to indicate the status of the hold request preference. The valid values are: • Active • Inactive	Yes
Preference Category	Indicates the category to which the preference belongs. The valid value is: • Hold Request	Not applicable

   - **Preference Settings** - Used to set the attributes in the hold request preference. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Attribute	Used to indicate the attribute that you want to set in the hold request preference.	Yes
Value	Used to specify the attribute value. **Note:** The attribute value list appears only when the attribute is selected from the respective list. The attribute value list varies depending on the attribute that you want to set in the hold request preference.	Yes
Entity Type	Used to indicate the type of entity for which the attribute is applicable. The valid values are: • Account	No

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Field Name	Field Description	Mandatory (Yes or No)
	• Adjustment • Billable Charge • Membership • Payment • Policy **Note:** At present, this data is stored for informational purposes only and is not considered in the business logic. If required, you can add more entity types in the **MAP_ENTITY_FLG** lookup field.	

The following table lists and describes the attributes available while defining, editing, or copying the hold request preference:

Attribute	Description	Mandatory (Yes or No)
Characteristic Type for Bill Level 1	Used to specify the characteristic type which stores the bill group derivation and pricing parameter 1 for the membership. The system considers this characteristic type to determine the account to which the group membership is billed. The system then creates an automatic hold request for the respective billing account via the inbound message. **Note:** You must specify a characteristic type where the characteristic entity is set to **Membership**.	Yes
Characteristic Type for Bill Level 2	Used to specify the characteristic type which stores the bill group derivation and pricing parameter 2 for the membership. The system considers this characteristic type to determine the account to which the group membership is billed. The system then creates an automatic hold request for the respective billing account via the inbound message. **Note:** You must specify a characteristic type where the characteristic entity is set to **Membership**.	Yes
Characteristic Type for Bill Level 3	Used to specify the characteristic type which stores the bill group derivation and pricing parameter 3 for the membership. The system considers this characteristic type to determine the account to which the group membership is billed. The system then creates an automatic hold request for the respective billing account via the inbound message. **Note:** You must specify a characteristic type where the characteristic entity is set to **Membership**.	Yes
Characteristic Type for Bill Level 4	Used to specify the characteristic type which stores the bill group derivation and pricing parameter 4 for the membership. The system considers this characteristic type to determine the account to which the group membership is billed. The system then creates an automatic hold request for the respective billing account via the inbound message.	Yes

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Attribute	Description	Mandatory (Yes or No)
	Note: You must specify a characteristic type where the characteristic entity is set to **Membership**.	
Create Automatic Hold Request	Used to indicate whether the system should automatically create a hold request whenever the status of an inbound message (with person or account data) is changed to **Rejected**. The valid values are: • Yes • No	Yes
Create Premium Hold Request	Used to indicate whether the system should automatically create a hold request when a billable charge creation or cancelation fails for an account through the **File Upload Interface** feature. The valid values are: • Yes • No	Yes
Default Automatic End Date	Used to specify the date till when you want an automatic hold request to be effective. **Note:** The specified date should be later than the date when the automatic hold request is created via an inbound message or file upload interface. You must specify the date in the **YYYY-MM-DD** format.	Yes
Default Automatic Hold Reason	Used to indicate the reason why you want to hold the entity via an automatic hold request. **Note:** The list includes only those values which are defined in the **HOLD_REASON_FLG** lookup field.	Yes
Default Automatic Hold Request Type Code	Used to indicate the hold request type using which you want to create an automatic hold request via an inbound message or file upload interface. **Note:** The list includes only those hold request types which are already defined in the system.	Yes
Default Manual Discard Reason	Used to indicate the reason why you want to discard the hold request via an inbound message. The system considers the default manual discard reason when the **action** tag is set to **R** within the **billHold** tag in an inbound message and the derived hold request's start data is a future date. **Note:** You must specify a reason which is already defined for the **Discarded** status of the **C1-HoldRequest** business object through the **Status Reason** screen.	Yes

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Attribute	Description	Mandatory (Yes or No)
Default Manual End Date	Used to specify the date till when you want a manual hold request to be effective. The system considers the default manual end date when the **action** tag is set to **H** or **R** and other hold details are not received within the **billHold** tag in an inbound message. **Note:** The specified date should be later than the date when the manual hold request is created via an inbound message. You must specify the date in the **YYYY-MM-DD** format.	Yes
Default Manual Hold Reason	Used to indicate the reason why you want to hold the entity via a manual hold request. The system considers the default manual hold reason when the **action** tag is set to **H** or **R** and other hold details are not received within the **billHold** tag in an inbound message. **Note:** The list includes only those values which are defined in the **HOLD_REASON_FLG** lookup field.	Yes
Default Manual Hold Request Type Code	Used to indicate the hold request type using which you want to create a manual hold request via an inbound message. The system considers the default manual hold request type when the **action** tag is set to **H** or **R** and other hold details are not received within the **billHold** tag in an inbound message. **Note:** The list includes only those hold request types which are already defined in the system.	Yes
Default Manual Release Reason	Used to indicate the reason why you want to release the hold request via an inbound message. The system considers the default manual release reason when the **action** tag is set to **R** within the **billHold** tag in an inbound message. **Note:** You must specify a reason which is already defined for the **Released** status of the **C1-HoldRequest** business object through the **Status Reason** screen.	Yes

Tip: Alternatively, you can click the **Edit** button in the **Field Mapping** zone to edit the details of the hold request preference.

3. Modify the required details in the **Main** section.
4. Define, edit, or remove the attribute from the hold request preference, if required.

Note: You must set at least one attribute in the hold request preference.

5. Click **Save**.
   The changes made to the hold request preference are saved.

Related Topics

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For more information on...	See...
How to search for a hold request preference	Searching for a Hold Request Preference on page 2709
Manual Hold Request Creation Via Inbound Message	Manual Hold Request Creation Via Inbound Message
Automatic Hold Request Creation Via Inbound Message	Automatic Hold Request Creation Via Inbound Message
Automatic Hold Request Creation Via File Upload Interface	Automatic Hold Request Creation Via File Upload Interface on page 3614

Copying a Hold Request Preference

Instead of creating a hold request preference from scratch, you can create a new hold request preference using an existing hold request preference. This is possible through copying a hold request preference. On copying a hold request preference, the details including the attributes are copied to the new hold request preference. You can then edit the details, if required.

Prerequisites

To copy a hold request preference, you should have:

- Hold request preference (whose copy you want to create) defined in the application
- Required characteristic types defined in the application (where the characteristic entity is set to **Membership**)
- Values defined in the **HOLD_REASON_FLG** lookup field.
- Required hold request types defined in the application.
- Required reasons defined for the **Discarded** and **Released** statuses of the **C1-HoldRequest** business object in the **Status Reason** screen.

Procedure

To copy a hold request preference:

1. Search for the hold request preference in the **Field Mapping** screen.
2. In the **Search Results** section, click the **Duplicate** (⧉) icon in the **Duplicate** column corresponding to the hold request preference whose copy you want to create.

   The **Field Mapping** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details for the hold request preference. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Preference	Used to specify the hold request preference.	Yes
Description	Used to specify the description for the hold request preference.	Yes
Detailed Description	Used to specify additional information about the hold request preference. **Note:** You can resize the text box depending on your requirement by clicking the **Resize Handle** (⤡) icon at the bottom right corner of the text box.	No
Status	Used to indicate the status of the hold request preference. The valid values are:	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	• Active • Inactive	
Preference Category	Indicates the category to which the preference belongs. The valid value is: • Hold Request	Not applicable

- **Preference Settings** - Used to set the attributes in the hold request preference. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Attribute	Used to indicate the attribute that you want to set in the hold request preference.	Yes
Value	Used to specify the attribute value. **Note:** The attribute value list appears only when the attribute is selected from the respective list. The attribute value list varies depending on the attribute that you want to set in the hold request preference.	Yes
Entity Type	Used to indicate the type of entity for which the attribute is applicable. The valid values are: • Account • Adjustment • Billable Charge • Membership • Payment • Policy **Note:** At present, this data is stored for informational purposes only and is not considered in the business logic. If required, you can add more entity types in the **MAP_ENTITY_FLG** lookup field.	No

The following table lists and describes the attributes available while defining, editing, or copying the hold request preference:

Attribute	Description	Mandatory (Yes or No)
Characteristic Type for Bill Level 1	Used to specify the characteristic type which stores the bill group derivation and pricing parameter 1 for the membership. The system considers this characteristic type to determine the account to which the group membership is billed. The system then creates an automatic hold request for the respective billing account via the inbound message.	Yes

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Attribute	Description	Mandatory (Yes or No)
	Note: You must specify a characteristic type where the characteristic entity is set to **Membership**.	
Characteristic Type for Bill Level 2	Used to specify the characteristic type which stores the bill group derivation and pricing parameter 2 for the membership. The system considers this characteristic type to determine the account to which the group membership is billed. The system then creates an automatic hold request for the respective billing account via the inbound message. **Note:** You must specify a characteristic type where the characteristic entity is set to **Membership**.	Yes
Characteristic Type for Bill Level 3	Used to specify the characteristic type which stores the bill group derivation and pricing parameter 3 for the membership. The system considers this characteristic type to determine the account to which the group membership is billed. The system then creates an automatic hold request for the respective billing account via the inbound message. **Note:** You must specify a characteristic type where the characteristic entity is set to **Membership**.	Yes
Characteristic Type for Bill Level 4	Used to specify the characteristic type which stores the bill group derivation and pricing parameter 4 for the membership. The system considers this characteristic type to determine the account to which the group membership is billed. The system then creates an automatic hold request for the respective billing account via the inbound message. **Note:** You must specify a characteristic type where the characteristic entity is set to **Membership**.	Yes
Create Automatic Hold Request	Used to indicate whether the system should automatically create a hold request whenever the status of an inbound message (with person or account data) is changed to **Rejected**. The valid values are: • Yes • No	Yes
Create Premium Hold Request	Used to indicate whether the system should automatically create a hold request when a billable charge creation or cancelation fails for an account through the **File Upload Interface** feature. The valid values are: • Yes • No	Yes
Default Automatic End Date	Used to specify the date till when you want an automatic hold request to be effective.	Yes

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Attribute	Description	Mandatory (Yes or No)
	Note: The specified date should be later than the date when the automatic hold request is created via an inbound message or file upload interface. You must specify the date in the **YYYY-MM-DD** format.	
Default Automatic Hold Reason	Used to indicate the reason why you want to hold the entity via an automatic hold request. **Note:** The list includes only those values which are defined in the **HOLD_REASON_FLG** lookup field.	Yes
Default Automatic Hold Request Type Code	Used to indicate the hold request type using which you want to create an automatic hold request via an inbound message or file upload interface. **Note:** The list includes only those hold request types which are already defined in the system.	Yes
Default Manual Discard Reason	Used to indicate the reason why you want to discard the hold request via an inbound message. The system considers the default manual discard reason when the **action** tag is set to **R** within the **billHold** tag in an inbound message and the derived hold request's start data is a future date. **Note:** You must specify a reason which is already defined for the **Discarded** status of the **C1-HoldRequest** business object through the **Status Reason** screen.	Yes
Default Manual End Date	Used to specify the date till when you want a manual hold request to be effective. The system considers the default manual end date when the **action** tag is set to **H** or **R** and other hold details are not received within the **billHold** tag in an inbound message. **Note:** The specified date should be later than the date when the manual hold request is created via an inbound message. You must specify the date in the **YYYY-MM-DD** format.	Yes
Default Manual Hold Reason	Used to indicate the reason why you want to hold the entity via a manual hold request. The system considers the default manual hold reason when the **action** tag is set to **H** or **R** and other hold details are not received within the **billHold** tag in an inbound message. **Note:** The list includes only those values which are defined in the **HOLD_REASON_FLG** lookup field.	Yes

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Attribute	Description	Mandatory (Yes or No)
Default Manual Hold Request Type Code	Used to indicate the hold request type using which you want to create a manual hold request via an inbound message. The system considers the default manual hold request type when the **action** tag is set to **H** or **R** and other hold details are not received within the **billHold** tag in an inbound message. **Note:** The list includes only those hold request types which are already defined in the system.	Yes
Default Manual Release Reason	Used to indicate the reason why you want to release the hold request via an inbound message. The system considers the default manual release reason when the **action** tag is set to **R** within the **billHold** tag in an inbound message. **Note:** You must specify a reason which is already defined for the **Released** status of the **C1-HoldRequest** business object through the **Status Reason** screen.	Yes

Note: While defining a hold request preference, you must set at least one attribute in the hold request preference.

Tip: Alternatively, you can click the **Duplicate** button in the **Field Mapping** zone to create a copy of the hold request preference.

3. Enter the required details in the **Main** section.
4. Define, edit, or remove the attribute from the hold request preference, if required.
5. Click **Save**.
   The new hold request preference is defined.

Related Topics

For more information on...	See...
How to search for a hold request preference	Searching for a Hold Request Preference on page 2709
Manual Hold Request Creation Via Inbound Message	Manual Hold Request Creation Via Inbound Message
Automatic Hold Request Creation Via Inbound Message	Automatic Hold Request Creation Via Inbound Message
Automatic Hold Request Creation Via File Upload Interface	Automatic Hold Request Creation Via File Upload Interface on page 3614

Deleting a Hold Request Preference

Procedure

To delete a hold request preference:

1. Search for the hold request preference in the **Field Mapping** screen.
2. In the **Search Results** section, click the **Delete** (🗑) icon in the **Delete** column corresponding to the hold request preference that you want to delete.
   A message appears confirming whether you want to delete the hold request preference.

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Tip: Alternatively, you can click the **Delete** button in the **Field Mapping** zone to delete the hold request preference.

3. Click **OK**.
   The hold request preference is deleted.

Related Topics

For more information on...	See...
How to search for a hold request preference	Searching for a Hold Request Preference on page 2709

Chapter 33

Upload Lockbox Payment and Remittance Advices

Topics:

- Prerequisites
- EDI 820 Flat File Description
- Sample EDI 820 Flat File
- Upload EDI 820 Files in ORMB

Oracle Revenue Management and Billing enables you to upload lockbox payment and remittance advices received in the **Electronic Data Exchange (EDI) 820** format. Under this feature, the payments made by customers are directed to a special post office box instead of going to the company directly. The bank goes to this post office box, retrieves the payments, processes them and deposits the funds directly into the company's bank account.

An EDI 820 payment order or remittance advice is an electronic document that can be used to initiate payments and send remittance information. EDI 820 sends information to vendor furnishing details of payment for his supplies. A remittance advice is a note sent from a customer to their supplier, informing the supplier that they have paid their invoice. The advice may contain elements such as a text note, the invoice number and the invoice amount, among others. Remittance advice is not required, but they are seen as a courtesy since they make it easier for the supplier to match invoices with payments.

To enable this feature, lockbox payment files are required to be uploaded on ORMB and these files have to be allocated to the appropriate accounts. To support multiple lines of business, the lockbox upload needs to:

- Consider the primary identifier when looking for a source customer number match. For customers having multiple source system identifiers, the lockbox process only matches against the one identified as primary customer.
- Incorporate the payment allocation logic in the system on the basis of which the lockbox uploads the payments for the identified customer.

To support remittances which can split a tender across multiple customers:

- Allow source customer number or tax id to be provided as remittance (RMR) values. In case of multiple source customer number or tax id, remittance values are provided for a single tender, the account associated with the first remittance value is set as the payor account. If there is at least one remittance value where a single customer account cannot be determined, the entire tender is placed into general suspense.
- A new payment upload batch **C1-PUPSG** is developed to read lockbox payment files from the bank and load the payment details into the ORMB payment upload staging tables for processing.
- Once the text file is uploaded, the deposit control staging, tender control staging, and payment upload staging records are created in the respective tables. You can then execute the **Payment Upload (PUPL)** batch to create the deposit control, tender controls, payment events, tenders, payments, and payment segments using payment records in the staging area.

Note: For more information about the batches, refer to the *Oracle Revenue Management and Billing Batch Guide*.

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Related Topics

For more information on...	See...
Prerequisites	Prerequisites on page 2729
EDI 820 Flat File Description	EDI 820 Flat File Description on page 2729
Sample EDI 820 Flat File	Sample EDI 820 Flat File on page 2731
Upload EDI 820 Files in ORMB	Upload EDI 820 Files in ORMB on page 2731

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Prerequisites

To setup the upload lockbox payment process, you need to do the following:

- Define the values in the parameters of the **C1-CCPYTSADS** and **C1-MATSATYP** algorithms.
- Lockbox tender types defined in the **C1_LBX_TENDER_TYPE** lookup field.
- Lockbox record type, lockbox reference identification qualifier, and lockbox remittance identification types defined in the **C1_LBX_820_RECORD_TYPE** , **C1_LBX_REF_IDQ_LKP**, and **C1_LBX_RMR_ID_TYPE** lookup fields respectively.

EDI 820 Flat File Description

Following is the description of the key field segments in the EDI 820 flat file format:

<table>
<tr><th>Field Name</th><th>Description</th></tr>
<tr><td>External Source ID</td><td>Uniquely identifies the lockbox.</td></tr>
<tr><td>External Transmission ID</td><td>Uniquely identifies the transmission. To ensure this transmission, the date component (such as, 20150813) should match the deposit date and there should only be one file per deposit date.</td></tr>
<tr><td>External Batch ID</td><td>Uniquely identifies the batch of payments in a transmission. To ensure these payments, if there are multiple ST records in a file, the transaction set control number (such as, 0101, 0202, ..) should be unique.</td></tr>
<tr><td>Payment Transaction</td><td>The following table describes the fields that are included in the payment transaction:
<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Attributes</td><td>Following are the attributes of payment transaction:
Payment Amount
Payment Method
Payment Date
Payor Name</td></tr>
<tr><td>Reference Records</td><td>Uniquely identifies the transaction. This is retrieved from different reference records based on the payment method. The following table indicates the external reference ID based on the payment methods used in the transaction:
<table>
<tr><th>External Reference ID Value</th><th>Description</th></tr>
<tr><td>ACH</td><td>Use the automated clearinghouse trace number. (Reference Identifier Code is 8G).</td></tr>
<tr><td>CHK</td><td>Use the transaction reference number. (Reference Identifier Code TN).</td></tr>
</table></td></tr>
</table></td></tr>
</table>

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<table>
<tr><th>Field Name</th><th>Description</th></tr>
<tr><td></td><td>
<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td></td><td>
<table>
<tr><th>External Reference ID Value</th><th>Description</th></tr>
<tr><td>FWT</td><td>Use the FEDWIRE confirmation number. (Reference Identifier Code 8I).</td></tr>
<tr><td>CAS</td><td>Use the transaction reference number. (Reference Identifier Code TN).</td></tr>
<tr><td>OBP</td><td>Use the online payment trace number. (Reference Identifier Code 8G).</td></tr>
</table>
</td></tr>
<tr><td>Source Customer Number</td><td>Uniquely identifies the customer. This is retrieved from the internal customer number reference record. (Reference Identifier Code is IT).</td></tr>
<tr><td>MICR</td><td>Uniquely identifies the MICR. (Reference Identifier Code is MICR)</td></tr>
<tr><td>Check Number</td><td>Uniquely identifies the check number. (Reference Identifier Code is CK)</td></tr>
<tr><td>Taxpayer Identification Number</td><td>Uniquely Identifies the taxpayer. (Reference Identifier Code is EI)</td></tr>
</table>
</td></tr>
<tr><td>Remittance Advice</td><td>he following table describes the fields that are involved in the remittance advice:
<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Attributes</td><td>Following are the attributes:
• Invoice Number
• Payment Amount</td></tr>
<tr><td>Reference Records</td><td>Uniquely identifies the remittance advice. The following table indicates the external reference ID based on the payment methods used in the remittance advice:
<table>
<tr><th>External Reference ID Value</th><th>Description</th></tr>
<tr><td>Billing Account ID</td><td>Uniquely identifies the account. (Reference Identifier Code is 12).</td></tr>
<tr><td>Bill Group ID</td><td>Uniquely identifies the billing group. (Reference Identifier Code is U1).</td></tr>
</table>
</td></tr>
</table>
</td></tr>
</table>

You can refer the following sample of EDI 820 flat file for better understanding:

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Sample EDI 820 Flat File on page 2731

Sample EDI 820 Flat File

Following is the sample of EDI 820 flat file format:

ISA*00**00**ZZ*USBANK*ZZ*UHGI*091212*1013*U*00401*000000005*0*P*~ **/** **Bank Details** **/**

GS*RA*CASH-01*UHGI*20210301*1013*4*X*004010~

ST*CHK*000000001~ **/** **CHK is the Tender Set Identifier Code, 000000001 is the Set Number**/**

BPR*I*50*C*ACH******1581282972******20210105~ **/** **50 is the Tender Amount, ACH is Tender Type, and 20210105 is the Date** **/**

DTM*582****RD8*20210101-20211231~

N1*PE**FI*513057_003~

REF*8G*00001111~ **/** **8G is the Tender Type Id, 00001111 is the ACH Trace Number** **/**

ENT*1*2J*EI*513-00-0003~ **/** **ENT is the Entity tag** **/**

NM1*QE*1**EDI,RECON003****N*HLPN0003~ **/** **HLPN0003 is the Binder Payment Identification Value** **/**

RMR*IV*921718966031**50~ **/** **IV is the Identifier Type and 921718966031 is the Identifier Value** **/**

SE*1*000000001~

GE*1*135260~

IEA*1*505043666~

Related Topics

For more information on...	See...
EDI 820 flat file format description	EDI 820 Flat File Description on page 2729

Upload EDI 820 Files in ORMB

A new batch named **Lockbox Payment Upload - Small Group (C1-PUPSG)** is introduced in this release. This batch is used to read the EDI 820 lockbox file received from the bank containing payment details for accounts and uploads the payment details into the ORMB payment upload staging tables. The batch uses the reference ID available in the payment and remittance record (in the specified order) to identify the account in the system:

- Source System Customer Number
- Invoice ID (if the source system customer number is not available)
- MICR (if the source system customer number and invoice ID are not available)

If all three reference IDs are available in the payment and remittance record, the system uses the source system customer number to identify the customer in ORMB. If the customer is found in ORMB, the system then checks whether the identified customer has an account. If the identified customer has one account, the system checks the following:

- If the **Check Binder Payment** parameter in the **Pay Tender Staging Account Distribution - Pay Oldest Bill First (C1-CCPYTSADS)** algorithm is set to Y, the system checks whether the payment is the first payment for the account and the tender used for the payment is not automatic payment. If so, the payment is applied to the **Binder Payment** contract.

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- If the **Check Promise To Pay** parameter in the **Tender Staging Account Distribution - Pay Oldest Bill First (C1-CCPYTSADS)** algorithm is set to **Y**, the system checks whether there is an active promise to pay for the account. If so, the payment is applied to the **On Account** contract.
- If the **Check Payment Agreement** parameter in the **Tender Staging Account Distribution - Pay Oldest Bill First (C1-CCPYTSADS)** algorithm is set to Y, the system checks whether there is an active payment agreement request for the account. If so, the payment is applied to the **On Account** contract.

However, if the **Check Binder Payment**, **Check Promise To Pay**, and **Check Payment Agreement** parameters are set to **N**, the payment is applied to the account's open bills in the order of the due date (i.e. oldest bill first). If the payment amount is greater than the account's billed balance plus overpayment threshold amount (defined in the **Tender Staging Account Distribution - Pay Oldest Bill First (C1-CCPYTSADS)** algorithm), the entire amount is applied on the On Account contract. However, if the payment amount is greater than the account's billed balance, but less than account's billed balance plus overpayment threshold amount, the overpayment amount is applied on the On Account contract.

Let us understand this with the help of an example:

Payment Amount	**Bill 1 (Due Date 01-Feb-2017)**	**Bill 2 (Due Date 01-April-2016)**	**Overpayment Threshold Amount**	**System Behavior**
100	50	50	50	One payment (50$) is created for Bill 2 (oldest due date); One payment (50$) is created for Bill 1.
150	50	100	120	One payment (100$) is created for Bill 2 (oldest due date); One payment (50$) is created for Bill 1.
175	60	75	50	One payment (75$) is created for Bill 2 (oldest due date); One payment (60$) is created for Bill 1; The remaining amount (40$) is applied on the On Account contract.
200	50	50	50	The entire amount (200$) is applied on the On Account contract. This is because the payment amount is greater than the account's billed balance plus overpayment threshold amount.

If the identified customer has multiple accounts, then the payment is applied to the On Account contract. If there are no accounts for the identified customer, or account could not be found in ORMB, or the customer could not be found in ORMB, the payment is applied to the suspense contract defined on the tender source associated with the external source (lockbox) ID.

If the source system customer number is not available, but the invoice ID and MICR are available in the payment and remittance record, then batch uses the invoice ID to find the account for which the invoice is created. Once the account is identified, the system behaves in the similar manner (listed above) when the identified customer has one account.

If the source system customer number and invoice ID are not available, but the MICR is available in the payment and remittance record, then system finds the payment where the same MICR is stamped as a characteristic and then finds the account for which the respective payment is created. In this way, the system derives the account for which the payment must be applied. However, the MICR is used to derive the account only when the **Search Customer Using MICR (Y/N)** parameter in the batch is set to **Y**. Once the account is derived, the system behaves in the similar manner (listed above) when the identified customer has one account.

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Following scenarios must be considered before uploading the **EDI 820** file in the system.

Scenario	System Behavior
If the **RMR** tag contains the bill Id and the **NM1** tag contains the binder payment identification value	The system initiates the payment for the bill Id and defines the binder payment identifier value in the **Characteristics** tab of the **Payment** screen.
If the **RMR** tag contains the bill Id but the **NM1** tag does not contains the binder payment identification value	The system initiates the payment for the bill Id and does not process further.
If the **RMR** tag contains some other information besides the bill Id and the **NM1** tag contains the binder payment identification value	The system performs the following actions: **1.** Identifies the appropriate membership using the binder payment identification value provided in the **NM1** tag. The binder payment identification value must contain the binder payment applicability flag set to **Y**. **2.** Once the membership is identified and is in the **Pending Effectuation** status, the system identifies the account of the membership, using the information provided in the **RMR** tag, and applies the payment against the binder contract. **3.** If the membership is in the **Active** status, the system applies the payment against the account's contract.
If the **RMR** tag contains some other information besides the bill Id and the **NM1** tag does not contains the binder payment identification value	The system identifies the account of the membership using the information provided in the **RMR** tag and applies the payment against the account's contract.

You can upload payment and remittance advice in the TXT format. You need to ensure that the text file is in the required format; otherwise the file will not be uploaded.

Once the text file is uploaded through the **Lockbox Payment Upload - Small Group (C1-PUPSG)** batch, the deposit control staging, tender control staging, and payment upload staging records are created in the respective tables. You can then execute the **Payment Upload (PUPL)** batch to create the deposit control, tender controls, payment events, tenders, payments, and payment segments using payment records in the staging area.

Note: For more information about the batches, refer to the *Oracle Revenue Management and Billing Batch Guide*.

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Chapter 34

Deferred Revenue Recognition

Topics:

- Prerequisites
- Deferred Revenue Recognition Status Transition
- Algorithms Used in Deferred Revenue Recognition
- Deferred Revenue Recognition Template (Used for Searching)
- Deferred Revenue Recognition Template (Used for Viewing)
- Deferred Revenue Recognition (Used for Searching)
- Deferred Revenue Recognition (Used for Viewing)

Most often, insurance company bill policies in installments, but Accounts Receivable (AR) and revenue for the total premium are booked as new business in the beginning of the policy term. Regulations, restrictions, or company policies may require that revenue for the total premium must be initially booked to the general ledger as deferred revenue. As time passes, the deferred revenue is realized as earned revenue. For example, the total premium for six months auto-policy (July 1 to Dec 31) is $1200. When this new business is booked, the revenue of $1200 is initially booked as deferred revenue. However, on July 31, August 31, September 30, October 31, November 30, and December 31, $200 must be transferred from deferred revenue GL to earned revenue GL. In order to manage this process, adjustments are created that transfer amount from deferred revenue GL to earned revenue GL.

A deferred revenue recognition schedule determines when these deferred revenue recognition adjustments must be created and posted. On the recognition date, the deferred revenue recognition adjustment is created to transfer a portion of deferred revenue to earned revenue. The corresponding financial transaction does not impact customer's account balance.

You need to create a deferred revenue recognition template for each distribution code and contract type combination for which you want to create a deferred revenue recognition (when the bill segment and adjustment financial transactions created against the respective contracts are frozen). It is the deferred revenue recognition template which helps the system to determine:

- Adjustment type using which the adjustment should be created when the deferred revenue is recognized
- Whether the recognition amount and date in the deferred revenue recognition schedule are editable until recognized
- Whether the deferred revenue recognition schedule must be generated automatically or manually
- Whether the deferred revenue must be recognized daily, weekly, or monthly
- Whether the deferred revenue amount must be prorated when the recognition schedule is set to Monthly
- Algorithm using which the recognition lines in the deferred revenue recognition schedule should be created
- Algorithm using which the adjustment must be generated when the deferred revenue is recognized

During the deferred revenue recognition process, a deferred revenue recognition creation goes through various statuses in its lifecycle. For more information about the deferred revenue recognition statuses, see Deferred Revenue Recognition Status Transition on page 2737.

Note: The lifecycle of a deferred revenue recognition creation is driven by the respective business object using which the deferred revenue recognition is generated. The deferred revenue recognition feature explained in this document is articulated based on the lifecycle and logic defined in the business objects.

For more information on how to setup the deferred revenue recognition process, see Prerequisites on page 2737.

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Prerequisites

To setup the deferred revenue recognition feature, you need to do the following:

- Define the required deferred revenue recognition templates in the system.
- Define the required characteristic types where the characteristic entity is set to **Deferred Revenue Recognition**.
- Define the values for the following parameters in the **C1-REVRECITM** algorithm:
  - Use Calendar or Business Days (C or B)
  - Override Default Recognition Date (Y or N)
  - Override Default Weekly Recognition Day (Mon, Tue, Wed, Thu, Fri, Sat, Sun)
  - Override Default Monthly Recognition Date (1-31)
- Define the value for the **Use Contract Expiration Date (Y or N)** parameter in the **C1-REVRECSCH** algorithm.
- Define the value for the **Create Adjustments (Y or N)** parameter in the **C1-REVITMREC** algorithm.
- Set the batch control type of the **Deferred Revenue Recognition Periodic Monitor (C1-RRSMO)** batch to **Timed** and define the following attributes:
  - Time Interval
  - Timer Active
  - User ID
  - Batch Language
  - Email Address

Deferred Revenue Recognition Status Transition

The following figure graphically indicates how a deferred revenue recognition status transition moves from one status to another:

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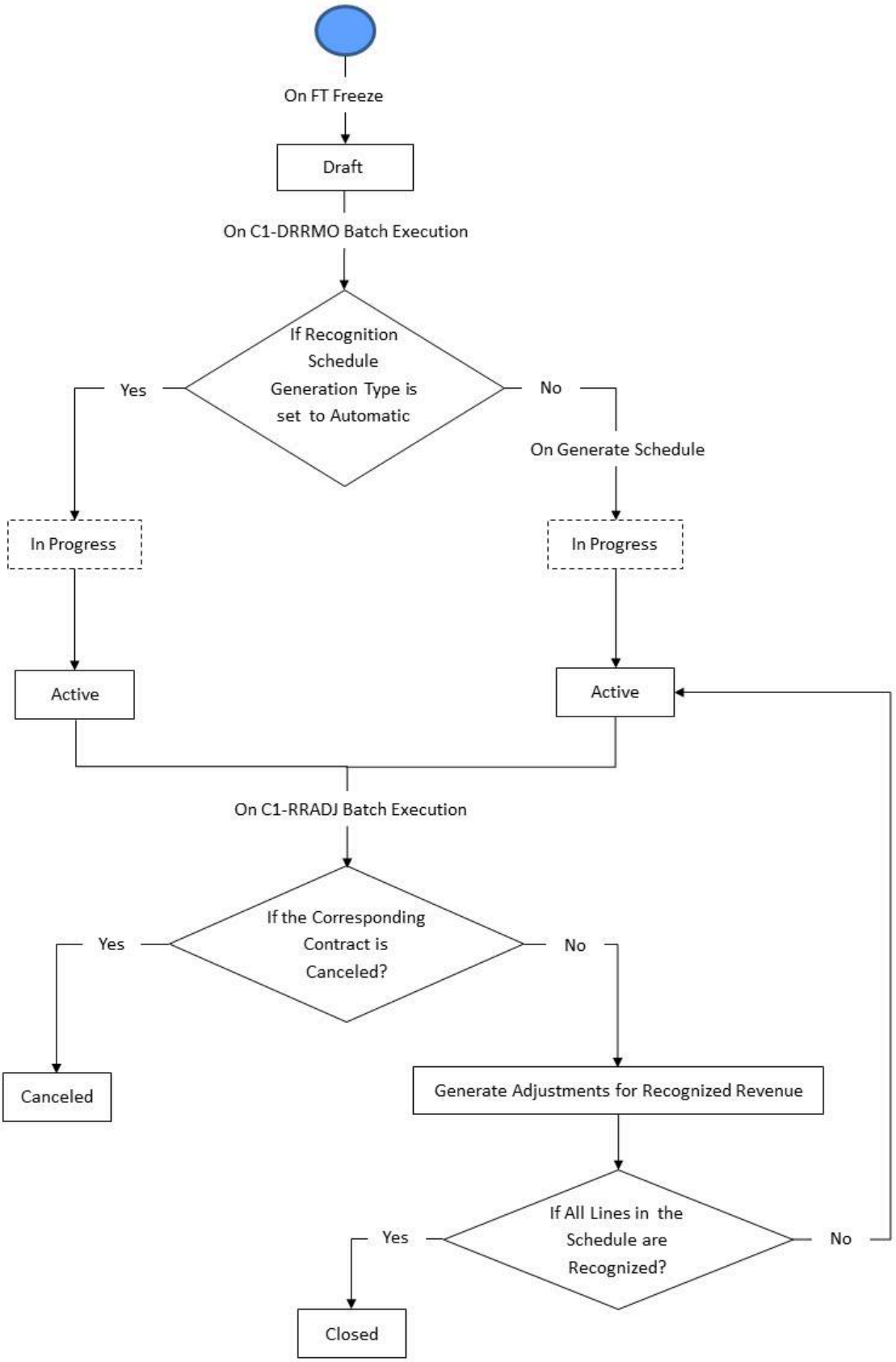

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Algorithms Used in Deferred Revenue Recognition

The following table lists the algorithms which are used in the lifecycle of the business object:

Status	System Event	Algorithm	Algorithm Type	Description
		C1-REVRECSCH	C1-REVRECSCH	This algorithm is invoked when the status of the bill segment and adjustment financial transactions created against the contracts (of the contract type to which the algorithm is attached) is set to Frozen. It checks whether an active deferred revenue recognition template exists for the distribution code and contract type combination. If so, it creates a deferred revenue recognition using the template and sets the status of the deferred revenue recognition to Draft. It then checks whether the type of the corresponding financial transaction is Bill Segment or Adjustment. If the type of the corresponding financial transaction is Bill Segment, it sets the valid until date of the deferred revenue recognition to the bill segment end date. However, if the type of the corresponding financial transaction is Adjustment, it checks whether the Use Contract Expiration Date (Y or N) parameter is set to Y or N. If the Use Contract Expiration Date (Y or N) parameter is set to Y, it sets the valid until date of the deferred revenue recognition to the contract expiration date. However, if the Use Contract Expiration Date (Y or N) parameter is set to N, it sets the valid until date of the deferred revenue recognition to the financial transaction arrears date. In addition, on creating the deferred revenue recognition, an appropriate log entry is added which you can view in the Deferred Revenue Recognition Log zone. It contains the following parameter: • Use Contract Expiration Date (Y or N) - Used to indicate whether the valid until date must be set to the contract expiration date when the type of the corresponding financial transaction is Adjustment. The valid values are Y and N. This parameter is mandatory.
		C1-REVRECITM	C1-REVRECITM	This algorithm creates schedule for the deferred revenue recognition. It considers the valid until date and accordingly creates the recognition lines within the schedule. If the recognition schedule is Weekly, by default, the recognition day is set to Mon

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Status	System Event	Algorithm	Algorithm Type	Description
				(which means Monday of each week). However, if the recognition schedule is Monthly, by default, the recognition date is set to the last day of the month (i.e. 28, 29, 30, or 31) It contains the following parameters: • **Use Calendar or Business Days (C or B)** - Used to indicate whether you want to use the calendar or business days while generating the recognition schedule. The business days are derived using the work calendar defined on the financial transaction. If you do not specify any value for this parameter, by default, it is set to C. This parameter is mandatory. • **Override Default Recognition Date (Y or N)** - Used to indicate whether you want to override the default weekly or monthly recognition date. The valid values are Y and N. This parameter is mandatory. • **Override Default Weekly Recognition Day (Mon, Tue, Wed, Thu, Fri, Sat, Sun)** - Used to indicate the day of the week when you want to recognize the deferred revenue. The valid values are Mon, Tue, Wed, Thu, Fri, Sat, and Sun. This parameter is required when you want to override the default weekly recognition day. • **Override Default Monthly Recognition Date (1-31)** - Used to indicate the day of the month when you want to recognize the deferred revenue. The valid values are 1, 2, 3, …, 31. This parameter is required when you want to override the default monthly recognition date.
		C1-REVRECADJ	C1-REVRECADJ	This algorithm creates deferred revenue recognition adjustment using the adjustment type defined on the respective deferred revenue recognition template. Before creating the deferred revenue recognition adjustment, it checks whether the contract for which the deferred revenue recognition is created is cancelled. If so, the status of the deferred revenue recognition is set to Canceled. If all lines in the recognition schedule are recognized, the status of the deferred revenue recognition is set to Closed.

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Status	System Event	Algorithm	Algorithm Type	Description
		C1-REVITMREC	C1-REVITMREC	If this algorithm is attached in the deferred revenue recognition template, it is invoked while executing the C1-RRADJ batch. It contains the following parameter: • **Create Adjustments (Y or N)** - Used to indicate whether the deferred revenue recognition adjustment must be created or not when the recognition date is earlier than or equal to the batch business date. The valid values are Y and N. This parameter is mandatory.
		C1-DRRTM-INF	C1-DRRTM-INF	This algorithm generates the deferred revenue recognition template information string which appears throughout the application. It concatenates the following fields separated by a comma in the specified order: **1.** Deferred Revenue Recognition Template **2.** Description
		C1-DRRTMPVAL	C1-DRRTMPVAL	This algorithm validates the deferred revenue recognition template. It checks the following: • Whether the data is specified in the mandatory fields, such as Deferred Revenue Recognition Template, Description, Status, Distribution Code, Contract Type, Adjustment Type, Recognition Schedule Generation Type, and Recognition Schedule. • Whether an algorithm is attached to the Create Deferred Revenue Recognition Schedule and Generate Deferred Revenue Recognition Adjustment system events. • Whether a deferred revenue recognition template already exists for the specified distribution code and contract type combination. • Whether special characters except underscore are specified in the Deferred Revenue Recognition Template field. • Whether the high proration limit is between 0 to 31 and is greater than the low proration limit.>> Whether the low proration limit is between 0 to 31 and is less than the high proration limit. In addition, it does not allow you to:

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Status	System Event	Algorithm	Algorithm Type	Description
				• Delete a deferred revenue recognition template when it is used to create a deferred revenue recognition. • Edit a deferred revenue recognition template when the corresponding deferred revenue recognition is in the Draft status. • Inactivate a deferred revenue recognition template when the corresponding deferred revenue recognition is not in the Closed status. You must attach this validation algorithm to the custom business object which is used to create a deferred revenue recognition template. Otherwise, erroneous results might occur.
		C1-DRRSC-INF	C1-DRRSC-INF	This algorithm generates the deferred revenue recognition information string which appears throughout the application. It concatenates the following fields separated by a comma in the specified order: **1.** Deferred Revenue Recognition Template **2.** Deferred Revenue Recognition Status **3.** Distribution Code **4.** Deferred Revenue Recognition ID
		C1-REVMON	C1-REVMON	This algorithm is invoked when the C1-DRRMO batch is executed. It checks whether there are any deferred revenue recognitions in the Draft status. If there is any deferred revenue recognition in the Draft status, it checks whether the recognition schedule generation type in the respective deferred revenue recognition template is set to Automatic or Manual. If the recognition schedule generation type is set to Automatic, the status of the deferred revenue recognition is changed to In Progress. However, if the recognition schedule generation type is set to Manual, the status of the deferred revenue recognition remains as Draft.
		C1-REVRECINP	C1-REVRECINP	This algorithm creates an appropriate log entry when the status of the deferred revenue recognition is changed to In Progress. It invokes the algorithm attached to the Create Deferred Revenue Recognition Schedule system event of the respective deferred revenue recognition template. Once the recognition schedule is successfully created, the status of the deferred revenue recognition is changed to Active.

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Status	System Event	Algorithm	Algorithm Type	Description
		C1-REVRECACT	C1-REVRECACT	This algorithm transitions the current status to the specified status. You can specify the status to which you want the business object to transition in the following parameters: • Next Status • Next Transition Condition At a time, you can specify value for either the **Next Status** or **Next Transition Condition** parameter. If you don't specify any value for these parameters, the system will transition the business object to the default next status specified in its lifecycle. This algorithm creates an appropriate log entry when the status of the deferred revenue recognition is changed to Active.

Deferred Revenue Recognition Template (Used for Searching)

The **Deferred Revenue Recognition** screen allows you to search for a deferred revenue recognition template using various search criteria. Through this screen, you can navigate to the following screen:

- Deferred Revenue Recognition Template (Used for Viewing) on page 2750

This screen consists of the following zone:

- Search Deferred Revenue Recognition Template on page 2743

Search Deferred Revenue Recognition Template

The **Search Deferred Revenue Recognition Template** zone allows you to search for a deferred revenue recognition template using various search criteria. It contains the following two sections:

- **Search Criteria** - The **Search Criteria** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Deferred Revenue Recognition Template	Used to search the basic information about the deferred revenue recognition template.	Yes
Description	Used to search the description of the deferred revenue recognition template.	No
Recognition Schedule	Used to search deferred revenue recognition with a particular schedule. The valid values are: • Daily • Monthly • Weekly	No
Status	Used to indicate the deferred revenue recognition template with a particular status. The valid values are:	No

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Field Name	Field Description	Mandatory (Yes or No)
	• Active • Inactive	

Note: You must specify at least one search criterion while searching for a deferred revenue recognition template.

- **Search Results** - On clicking the **Search** button, the search results appear based on the specified search criteria. The **Search Results** section contains the following columns:

Column Name	Column Description
Deferred Revenue Recognition Template	Displays the deferred revenue recognition.
	Note: It has a link. On clicking the link, the **Deferred Revenue Recognition Template** screen appears where you can view the details of the respective deferred revenue recognition template.
Distribution Code	Indicates the distribution code associated with the rate component.
Contract Type	Displays the contract which is generated against a particular type of contract.
Recognition Schedule	Displays the schedule when the deferred revenue is recognized.

Related Topics

For more information on...	See...
How to view the details of a deferred revenue recognition template	Viewing the Deferred Revenue Recognition Template Details on page 2750
How to search for a deferred revenue recognition template	Searching for a Deferred Revenue Recognition Template on page 2744

Searching for a Deferred Revenue Recognition Template

Prerequisites

To search for a deferred revenue recognition template, you should have:

- Deferred revenue recognition template defined in the system.
- Deferred Revenue Recognition Schedule defined in the system.

Procedure

To search for a deferred revenue recognition template:

1. Click the **Admin** menu in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **D** and then click **Deferred Revenue Recognition Template**.
   The **Deferred Revenue Recognition Template** screen appears.
3. Enter the search criteria in the **Search Deferred Revenue Recognition Template** zone.

Note: ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.

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4. Click **Search**.
   A list of deferred revenue recognition templates that meet the search criteria appears in the **Search Results** section.

Related Topics

For more information on...	See...
Deferred Revenue Recognition Template screen	Deferred Revenue Recognition Template (Used for Searching) on page 2743
Search Deferred Revenue Recognition Template zone	Search Deferred Revenue Recognition Template on page 2743

Defining a Deferred Revenue Recognition Template

Prerequisites

To define a deferred revenue recognition template, you should have:

- Contract types defined in the system

Procedure

To define a deferred revenue recognition template:

1. Click the **Admin** menu in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **D** and then click **Deferred Revenue Recognition Template**.
   The **Deferred Revenue Recognition Template** screen appears.
3. Click the **Add** button in the **Page Title** area of the **Deferred Revenue Recognition Template** screen.

   The **Deferred Revenue Recognition Template** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details about the deferred revenue recognition template.
   - **Parameters** - Used to specify the various parameters for the deferred revenue recognition template.
   - **Algorithms** - Used to associate algorithms with the deferred revenue recognition template.
   - **Divisions** - Used to associate a deferred revenue recognition template with a division.
   - **Characteristics** - Used to define the characteristics for the deferred revenue recognition template.

   The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Deferred Revenue Recognition Template	Used to specify the deferred revenue recognition template.	Yes
Description	Used to specify the description of the deferred revenue recognition template.	No
Status	Used to indicate the status of the deferred revenue recognition template. The valid values are: • Active • Inactive	Yes

   The **Parameters** section contains the following fields:

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Field Name	Field Description	Mandatory (Yes or No)
Distribution Code	Used to indicate the distribution code associated with the deferred revenue recognition. **Note:** The **Search** (icon appears corresponding to this field. On clicking the **Search** icon, the **Distribution Code Search** window appears.	Yes
Contract Type	Used to indicate a particular type of contract. **Note:** The **Search** (icon appears corresponding to this field. On clicking the **Search** icon, the **Contract Type Search** window appears.	Yes
Adjustment Type	Used to indicate the adjustment type using which the adjustment must be created. **Note:** The **Search** ( ) icon appears corresponding to this field. On clicking the **Search** icon, the **Adjustment Type Search** window appears.	No
Allow Editing	Used to allow editing of recognition schedule.	No
Generation Type	Used to indicate the type of deferred revenue recognition generation. The valid values are: • Automatic • Manual	Yes (Conditional)
Recognition Schedule	Used to indicate the schedule of deferred revenue recognition generation. The valid values are: • Daily • Monthly • Weekly	Yes
Allow Proration	Used to allow proration. **Note:** The **Allow Proration** field appears when you select **Recognition Schedule** as **Monthly**.	Yes
High Proration Limit (Days)	Used to specify whether deferred revenue amount must be prorated while revenue recognition. If the number of days from when the policy is enrolled to the end of the month (in which it is enrolled) is greater than the specified limit, then the amount is prorated. **Note:** This field appears when you check the tick-box for **Allow Proration**.	Yes (Conditional) **Note:** This field is required when the recognition schedule is selected as monthly and when the **Allow Proration** check box is selected.
Low Proration Limit (Days)	Used to specify whether deferred revenue amount must be prorated while revenue recognition. If the number of days from when the policy is enrolled to the end of the month	Yes (Conditional)

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Field Name	Field Description	Mandatory (Yes or No)
	(in which it is enrolled) is less than the specified limit, then the amount is prorated. **Note:** This field appears when you check the tick-box for **Allow Proration**.	**Note:** This field is required when the recognition schedule is selected as monthly and when the **Allow Proration** check box is selected.

4. Enter the required details.
5. Associate algorithms with the deferred revenue recognition template, if required.
6. View the division to which the deferred revenue recognition template is associated in the **Divisions** section.
7. Define the characteristics specific to division to which the deferred revenue recognition template is associated in the **Characteristics** section.
8. Click **Save**.
   The deferred revenue recognition template is created.

Related Topics

For more information on...	See...
Deferred Revenue Recognition Template screen	Deferred Revenue Recognition Template (Used for Searching) on page 2743
How to associate algorithms with the deferred revenue recognition template	Associating Algorithms with a Deferred Revenue Recognition Template on page 2747

Associating Algorithms with a Deferred Revenue Recognition Template

Procedure

To associate algorithms with a deferred revenue recognition template:

1. Ensure that the **Algorithms** section is expanded when you are defining or editing a deferred revenue *r*ecognition template.

   The **Algorithms** section contains the following fields in a grid:

Field Name	Field Description	Mandatory (Yes or No)
System Event	Used to indicate the system event for an algorithm.	Yes
Sequence	Used to specify the sequence number. **Note:** On specifying the value for a predefined characteristic type, the description of the characteristic value appears corresponding to the **Characteristic Value** field.	Yes
Algorithm	Used to associate an algorithm to the system event that you have selected.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The **Search** (🔍) icon appears corresponding to this field. On clicking the **Search** icon, the **Algorithm Search** window appears. On specifying the algorithm for a system event, the description of the algorithm appears corresponding to the **Algorithm** field.	

2. Enter the required details in the **Algorithms** section.
3. If you want to define more than one algorithm for the deferred revenue recognition template, click the **Add** (+) icon, and then repeat 2.

Note: However, if you want to remove an algorithm from the deferred revenue recognition template, click the **Delete** (🗑) icon corresponding to the algorithm.

Related Topics

For more information on...	See...
How to define a deferred revenue recognition template	Defining a Deferred Revenue Recognition Template on page 2745
How to edit a deferred revenue recognition template	Editing a Deferred Revenue Recognition Template on page 2753

Associating Deferred Revenue Recognition Template With A Division

Prerequisites

To associate deferred revenue recognition template with a division, you should have:

- Divisions defined in the application

Procedure

To associate deferred revenue recognition template with a division:

1. Ensure that the **Divisions** section is expanded when you are creating or *e*diting a deferred revenue recognition template.

   The **Divisions** section appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Division	Used to indicate the division to which you want to associate the deferred revenue recognition template. **Note:** You can only view those divisions to which you have access in the **Division** list.	No

2. Select the required division from the list.
3. If you want to associate the deferred revenue recognition template with more than one division, click the **Add** (+) icon and then repeat step *2*.

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> **Note:** However, if you want to remove the deferred revenue recognition template from a division, click the **Delete** (🗑) icon corresponding to the division.

4. Click **Save**.
   The deferred revenue recognition template is associated with the divisions.

Related Topics

For more information on...	See...
How to edit a deferred revenue recognition template	Editing a Deferred Revenue Recognition Template on page 2753
How to define a deferred revenue recognition template	Defining a Deferred Revenue Recognition Template on page 2745

Defining a Characteristic for a Deferred Revenue Recognition Template

Prerequisites

To define a characteristic for a deferred revenue recognition template, you should have:

- Characteristic types defined in the application (where the characteristic entity is set to **Deferred Revenue Recognition Template**)

Procedure

To define a characteristic for a deferred revenue recognition template:

1. Ensure that the **Characteristics** section is expanded when you are defining or editing a deferred revenue recognition template.

   The **Characteristics** section contains the following fields in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Characteristic Type	Used to indicate the characteristic type.	Yes (Conditional)
		Note: This field is required when you are defining a characteristic for the deferred revenue recognition template.
Characteristic Value	Used to specify the value for the characteristic type.	Yes (Conditional)
	Note: On specifying the value for a characteristic type, the description of the characteristic value appears corresponding to the **Characteristic Value**d field.	**Note:** This field is required when you are defining a characteristic for the deferred revenue recognition template.

2. Enter the required details in the **Characteristics** section.
3. If you want to define more than one characteristic for the deferred revenue recognition template, click the **Add** (+) icon *a*nd then repeat step 2.

> **Note:** However, if you want to remove a characteristic from the deferred revenue recognition template, click the **Delete** (🗑) icon corresponding to the characteristic.

Related Topics

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For more information on...	See...
How to edit a deferred revenue recognition template	Editing a Deferred Revenue Recognition Template on page 2753
How to define a deferred revenue recognition template	Defining a Deferred Revenue Recognition Template on page 2745

Viewing the Deferred Revenue Recognition Template Details

Procedure

To view the details of a deferred revenue recognition template:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **D** and then click **Deferred Revenue Recognition Template**.
   The **Deferred Revenue Recognition Template** screen appears.
3. Search for the deferred revenue recognition template in the **Deferred Revenue Recognition Template** screen.
4. In the **Search Results** section, click the link in the **Deferred Revenue Recognition Template** column *c*orresponding to the deferred revenue recognition template whose details you want to view.

   The **Deferred Revenue Recognition Template** screen appears.
5. View the details of the deferred revenue recognition template in the **Deferred Revenue Recognition Template** zone.

Related Topics

For more information on...	See...
Deferred Revenue Recognition Template screen	Deferred Revenue Recognition Template (Used for Searching) on page 2743
Deferred Revenue Recognition Template zone	Deferred Revenue Recognition Template on page 2751
How to search for a deferred revenue recognition template	Searching for a Deferred Revenue Recognition Template on page 2744

Deferred Revenue Recognition Template (Used for Viewing)

Once the deferred revenue recognition templates are created, the **Deferred Revenue Recognition Template** screen allows you to:

- Generate the deferred revenue recognition schedule
- View the details of a deferred revenue recognition template
- Edit a deferred revenue recognition template
- Delete a deferred revenue recognition template

This screen consists of the following zone:

- Deferred Revenue Recognition Template on page 2751

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Deferred Revenue Recognition Template

The **Deferred Revenue Recognition Template** zone displays the details of the deferred revenue recognition template. It contains the following sections:

- **Main** - Displays basic information about the deferred revenue recognition template. It contains the following fields:

Field Name	Field Description
Deferred Revenue Recognition Template	Displays the deferred revenue recognition template
Description	Used to specify the description of the deferred revenue recognition template
Status	Used to indicate the status of the deferred revenue recognition template. The valid values are: • Active • Inactive

- **Parameters** - Displays the parameters used in the deferred revenue recognition template.

Field Name	Field Description
Distribution Code	Indicates the distribution code. **Note:** It has a link. On clicking the link, the **Distribution Code** screen appears where you can view the details of the respective distribution code.
Contract Type	Displays the **Deferred Revenue Recognition Template** which are generated against a particular type of contract.
Adjustment Type	Indicates the adjustment type using which the adjustment must be created. **Note:** It has a link. On clicking the link, the **Adjustment Type** screen appears where you can view the details of the respective adjustment type.
Generation Type	Displays the type of deferred revenue recognition template. The valid values are: • Manual • Automatic
Allow Editing	Indicates the editing of recognition schedule.
Recognition Schedule	Indicates the schedule when the deferred revenue is recognized. The valid values are: • Daily • Monthly • Weekly
Allow Proration	Used to allow proration. **Note:** The **Allow Proration** field appears when you select **Recognition Schedule** as **Monthly**.
High Proration Limit (Days)	Displays whether deferred revenue amount must be prorated while revenue recognition. If the number of days from when the policy is enrolled to the end

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Field Name	Field Description
	of the month (in which it is enrolled) is greater than the specified limit, then the amount is prorated. **Note:** This field appears when you check the tick-box for **Allow Proration**.
Low Proration Limit (Days)	Displays whether deferred revenue amount must be prorated while revenue recognition. If the number of days from when the policy is enrolled to the end of the month (in which it is enrolled) is less than the specified limit, then the amount is prorated. **Note:** This field appears when you check the tick-box for **Allow Proration**.

- **Divisions** - Displays the associated deferred revenue recognition template with one or more divisions. It contains the following column:

Column Name	Column Description
Division	Displays the division to which you want to associate the deferred revenue recognition template.

- **Algorithms** - Lists the algorithms associated with the deferred revenue recognition template. It contains the following columns:

Column Name	Column Description	Mandatory (Yes or No)
System Event	Indicates the system event on which the algorithm must be executed	No
Sequence	Displays the sequence number.	No
Algorithm	Displays an algorithm that needs to be attached to the selected system event. **Note:** It has a link. On clicking the link, the **Algorithm** screen appears where you can view the details of the respective algorithm.	No

- **Characteristics** - Lists the characteristics defined for the deferred revenue recognition template. It contains the following fields:

Column Name	Column Description
Characteristic Type	Displays the characteristic type.
Characteristic Type	Displays the value of the characteristic type.

- **Record Actions** -This section contains the following buttons:

Button Name	Button Description
Edit	Used to define, edit, and remove algorithms of the deferred revenue recognition template. **Note:** The **Edit** button appears when the deferred revenue recognition template is in the **Active** status.
Delete	Used to delete the deferred revenue recognition template.

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-
- **Record Information** - This section contains the following fields:

Field Name	Field Description
Business Object	Indicates the business object using which the deferred revenue recognition template is created. In addition, a context menu appears corresponding to this field which helps in navigating to other screens in the application.
	Note: It has a link. On clicking the link, the **Business Object** screen appears where you can view the details of the respective business object.

Editing a Deferred Revenue Recognition Template

Procedure

To edit a deferred revenue recognition template:

1. Search for the deferred revenue recognition template in the **Deferred Revenue Recognition Template** screen.
2. In the **Search Results** section, click the link in the **Deferred Revenue Recognition Template** column *c*orresponding to the deferred revenue recognition template whose details you want to edit.
   The **Deferred Revenue Recognition Template** screen appears.
3. Click the **Edit** button in the **Deferred Revenue Recognition Template** zone.
   The **Deferred Revenue Recognition Template** screen appears.

   Note: The **Edit** button appears when the deferred revenue recognition template is in the **Active** status.
4. Associate, edit, or remove algorithms from the deferred revenue recognition template, if required.
5. Define, edit, or remove characteristics of the deferred revenue recognition template, if required.
6. Associate deferred revenue recognition template with a division, if required.
7. Click **Save**.
   The changes made to the deferred revenue recognition template are saved.

Related Topics

For more information on...	See...
Deferred Revenue Recognition Template screen	Deferred Revenue Recognition Template (Used for Viewing) on page 2750
Deferred Revenue Recognition Template zone	Deferred Revenue Recognition Template on page 2751
How to search for a deferred revenue recognition template	Searching for a Deferred Revenue Recognition Template on page 2744
How to associate algorithms with a deferred revenue recognition template	Associating Algorithms with a Deferred Revenue Recognition Template on page 2747

Deleting a Deferred Revenue Recognition Template

Procedure

To delete a deferred revenue recognition template:

1. Search for the deferred revenue recognition template in the **Deferred Revenue Recognition Template** screen.

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2. In the **Search Results** section, click the link in the **Deferred Revenue Recognition Template** column *c*orresponding to the deferred revenue recognition template that you want to delete.
   The **Deferred Revenue Recognition Template** screen appears.
3. Click the **Delete** button in the **Deferred Revenue Recognition Template** zone.
   A message appears confirming whether you want to delete the deferred revenue recognition template.
4. Click **OK**.
   The deferred revenue recognition template is deleted.

Related Topics

For more information on...	See...
Deferred Revenue Recognition Template screen	Deferred Revenue Recognition Template (Used for Viewing) on page 2750
Deferred Revenue Recognition Template zone	Deferred Revenue Recognition Template on page 2751
How to search for a deferred revenue recognition template	Searching for a Deferred Revenue Recognition Template on page 2744

Viewing the Deferred Revenue Recognition Template Details

Procedure

To view the details of a deferred revenue recognition template:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **D** and then click **Deferred Revenue Recognition Template**.
   The **Deferred Revenue Recognition Template** screen appears.
3. Search for the deferred revenue recognition template in the **Deferred Revenue Recognition Template** screen.
4. In the **Search Results** section, click the link in the **Deferred Revenue Recognition Template** column *c*orresponding to the deferred revenue recognition template whose details you want to view.

   The **Deferred Revenue Recognition Template** screen appears.
5. View the details of the deferred revenue recognition template in the **Deferred Revenue Recognition Template** zone.

Related Topics

For more information on...	See...
Deferred Revenue Recognition Template screen	Deferred Revenue Recognition Template (Used for Searching) on page 2743
Deferred Revenue Recognition Template zone	Deferred Revenue Recognition Template on page 2751
How to search for a deferred revenue recognition template	Searching for a Deferred Revenue Recognition Template on page 2744

Deferred Revenue Recognition (Used for Searching)

The **Deferred Revenue Recognition** screen allows you to search for a deferred revenue recognition using various search criteria. Through this screen, you can navigate to the following screen:

- Deferred Revenue Recognition (Used for Viewing) on page 2760

This screen consists of the following zone:

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- Search Deferred Revenue Recognition on page 2755

Search Deferred Revenue Recognition

The **Search Deferred Revenue Recognition** zone allows you to search for a deferred revenue recognition using various search criteria. It contains the following two sections:

- **Search Criteria** - This section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Search By	Used to indicate whether you want to search for a deferred revenue recognition using the deferred revenue recognition, person, account, or policy details. The valid values are: • Account Details • Person Details • Deferred Revenue Recognition Details • Financial Transaction Details • Policy Details **Note:** By default, the **Account Details** option is selected.	Yes
Person ID	Used to search deferred revenue recognition which are assigned to a particular person. **Note:** This field appears when you select the **Person Details** option from the **Search By** list.	No
Account ID	Used to search the account ID. **Note:** This field appears only when you select the **Account Details** option from the **Search By** list.	No
Person Identifier Type	Used to select the identifier type based on which you want to search deferred revenue recognition through which the person's record is created or updated in the system.	Yes (Conditional) **Note:** If you specify the person identifier as a search criteria, you have to select the person identifier type.
Person Identifier	Used to specify the value for the person identifier type.	Yes (Conditional) **Note:** If you specify the person identifier type as a search criteria, you have to specify the person identifier.
Account Identifier Type	Used to specify the account identifier type of the account whose details you want to search.	Yes (Conditional)

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Field Name	Field Description	Mandatory (Yes or No)
	Note: This field appears when you select the **Account Details** option from the **Search By** list.	**Note:** If you specify the account identifier as a search criteria, you have to select the account identifier type.
Account Identifier	Used to specify the value of the account identifier. **Note:** This field appears when you select the **Account Details** option from the **Search By** list.	Yes (Conditional) **Note:** If you specify the account identifier type as a search criteria, you have to specify the account identifier.
Contract ID	Used to specify the contract ID linked to the account. **Note:** This field appears when you select the **Account Details** option from the **Search By** list.	No
Person Hierarchy	Used to indicate whether to display hierarchy of the person linked to a particular bill. **Note:** This field appears when you select the **Person Details** option from the **Search By** list.	No
Status	Used to search deferred revenue recognition with a particular status. The valid values are: • Active • Closed • Canceled • Draft **Note:** This field appears when you select the **Person Details**, **Account Details**, or **Deferred Revenue Recognition Details** option from the **Search By** list.	No
Deferred Revenue Recognition Template	Used to indicate the template used for deferred revenue recognition. **Note:** This field appears when you select the **Person Details**, **Account Details**, or **Deferred Revenue Recognition Details** option from the **Search By** list.	No
Valid Until Date	Used to specify the date till which the deferred revenue recognition is valid. **Note:** This field appears when you select the **Person Details** or **Account Details** option from the **Search By** list.	No
Deferred Revenue Recognition ID	Used to search a particular deferred revenue recognition	No

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Field Name	Field Description	Mandatory (Yes or No)
	Note: This field appears when you select the **Deferred Revenue Recognition Details** option from the **Search By** list.	
Description	Used to specify the description of the deferred revenue recognition. **Note:** This field appears when you select the **Deferred Revenue Recognition Details** option from the **Search By** list.	No
Recognition Schedule	Used to search deferred revenue recognition with a particular schedule. The valid values are: • Daily • Monthly • Weekly **Note:** This field appears when you select the **Deferred Revenue Recognition Details** option from the **Search By** list.	No
Financial Transaction ID	Used to search deferred revenue recognition which are assigned to a particular financial transaction. **Note:** This field appears only when you select the **Financial Transaction Details** option from the **Search By** list.	
Policy Type	Used to indicate the type of policy. **Note:** This field appears when you select the **Policy Details** option from the **Search By** list.	Yes
Policy Number	Used to indicate the policy number. **Note:** This field appears when you select the **Policy Details** option from the **Search By** list.	No
Plan Number	Used to indicate the plan number of the policy. **Note:** This field appears when you select the **Policy Details** option from the **Search By** list.	No
Source System	Used to indicate the name of the external system from where the policy originated. **Note:** This field appears when you select the **Policy Details** option from the **Search By** list.	No
Start Date	Used to indicate the date from when the policy is effective.	No

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Field Name	Field Description	Mandatory (Yes or No)
	Note: This field appears when you select the **Policy Details** option from the **Search By** list.	
End Date	Used to indicate the date till when the policy is effective.	No
	Note: This field appears when you select the **Policy Details** option from the **Search By** list.	

Note: You must specify at least one search criterion while searching for a deferred revenue recognition.

- **Search Results** - On clicking the **Search** button, the search results appear based on the specified search criteria. The **Search Results** section contains the following columns:

Column Name	Column Description
Deferred Revenue Recognition Information	Displays information about the deferred revenue recognition.
	Note: It has a link. On clicking the link, the **Deferred Revenue Recognition** screen appears where you can view the details of the respective deferred revenue recognition.
Contract Information	Displays the basic information about the contract corresponding to the deferred revenue recognition. In addition, this column has a context menu which helps in navigating to other screens in the application.
	Note: It has a link. On clicking the link, the **Contract** screen appears where you can view the details of the respective contract.
Financial Transaction Information	Displays the basic information about the financial transaction corresponding to the deferred revenue recognition.
	Note: It has a link. On clicking the link, the **Financial Transaction** screen appears where you can view the details of the respective financial transaction.

Related Topics

For more information on...	See...
How to view the details of a deferred revenue recognition	Viewing the Deferred Revenue Recognition Details on page 2759
How to search for a deferred revenue recognition	Searching for a Deferred Revenue Recognition on page 2758

Searching for a Deferred Revenue Recognition

Prerequisites

To search for a deferred revenue recognition, you should have:

- Deferred Revenue Recognition Template defined in the application.
- Person identifier types defined in the application
- Account identifier types defined in the application

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- Recognition Schedules defined in the application
- Source Systems defined in the application

Procedure

To search for a deferred revenue recognition:

1. Click the **Menu** link in the **Application** toolbar.
   A list appears.
2. From the **Main** menu, select **Accounting and Receivable**.
   A sub-menu appears.
3. Click the **Search** option from the **Deferred Revenue Recognition** sub-menu.
   The **Deferred Revenue Recognition** screen appears.
4. Enter the search criteria in the **Search Deferred Revenue Recognition** zone.

   Note: ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.
5. Click **Search**.
   A list of deferred revenue recognition that meet the search criteria appears in the **Search Results** section.

Related Topics

For more information on...	See...
Deferred Revenue Recognition screen	Deferred Revenue Recognition (Used for Searching) on page 2754
Search Deferred Revenue Recognition zone	Search Deferred Revenue Recognition on page 2755

Viewing the Deferred Revenue Recognition Details

Procedure

To view the details of a deferred revenue recognition:

1. Search for the deferred revenue recognition in the **Deferred Revenue Recognition** screen.
2. In the **Search Results** section, click the link in the **Deferred Revenue Recognition Information** column corresponding to the deferred revenue recognition whose details you want to view.

   The **Deferred Revenue Recognition** screen appears. It consists of the following tabs:

   - Deferred Revenue Recognition - Main on page 2760
   - Deferred Revenue Recognition - Log on page 2763
3. Ensure that the **Main** tab is selected.
4. View the details of the deferred revenue recognition in the **Deferred Revenue Recognition** zone.

Related Topics

For more information on...	See...
Deferred Revenue Recognition screen	Deferred Revenue Recognition (Used for Viewing) on page 2760
Search Deferred Revenue Recognition zone	Search Deferred Revenue Recognition on page 2755
How to search for a deferred revenue recognition	Searching for a Deferred Revenue Recognition on page 2758

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Deferred Revenue Recognition (Used for Viewing)

The **Deferred Revenue Recognition** screen allows you to:

- View the details of a deferred revenue recognition
- Edit a deferred revenue recognition
- Generate the deferred revenue recognition schedule
- Add related deferred revenue recognitions
- Edit the details of a deferred revenue recognition schedule
- View the log of a deferred revenue recognition
- Add a log entry for a deferred revenue recognition

This screen consists of the following tabs:

- Deferred Revenue Recognition - Main on page 2760
- Deferred Revenue Recognition - Log on page 2763

Deferred Revenue Recognition - Main

The **Main** tab displays information about the deferred revenue recognition. It contains the following zones:

- Deferred Revenue Recognition on page 2760
- Associated Deferred Revenue Recognitions on page 2762
- Recognition Schedule on page 2762
- Revenue Recognition Items on page 2763

Deferred Revenue Recognition

The **Deferred Revenue Recognition** zone displays the details of the deferred revenue recognition. It contains the following sections:

- **Main** - Displays basic information about the deferred revenue recognition. It contains the following fields:

Field Name	Field Description
Deferred Revenue Recognition Information	Displays information about the deferred revenue recognition.
Deferred Revenue Recognition Template Information	Displays information about the deferred revenue recognition template.
	Note: It has a link. On clicking the link, the **Deferred Revenue Recognition Template** screen appears where you can view the details of the deferred revenue recognition template.
Distribution Code	Displays the distribution code which indicates the template associated with the deferred revenue recognition.
Financial Transaction Information	Displays the basic information about the financial transaction corresponding to the deferred revenue recognition.
	Note: It has a link. On clicking the link, the **Financial Transaction Information** screen appears where you can view the details of the financial transaction.
Total Revenue Deferred	Displays the total revenue deferred.

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Field Name	Field Description
Total Revenue Recognized	Displays the total revenue recognized.
Status	Indicates the status of the deferred revenue recognition. The valid values are: • Active • Closed • Canceled • Draft

- **Related Deferred Revenue Recognitions** - Lists the related deferred revenue recognitions. It contains the following columns:

Column Name	Column Description
Deferred Revenue Recognition Information	Displays the basic information of the related Deferred Revenue Recognition Schedules (i.e. DRR Schedule of the BS/AD, corresponding to the BX/AX)
Create Date Time	Displays the date and time when the deferred revenue recognition is created.
Financial Transaction Information	Displays the basic information about the financial transaction corresponding to the deferred revenue recognition.

- **Record Actions** - This section contains the following buttons:

Button Name	Button Description
Edit	Used to define, edit and remove characteristics, related deferred revenue recognitions of the deferred revenue recognition.
	Note: The **Edit** button appears when the deferred revenue recognition is in the **Active** status.
Generate Schedule	Used to generate the deferred revenue recognition schedule.
	Note: The **Generate Schedule** button appears only when the deferred revenue recognition is in the **Draft** status.

- **Record Information** - This section contains the following fields:

Field Name	Field Description
Business Object	Indicates the business object using which the deferred revenue recognition is created. In addition, a context menu appears corresponding to this field which helps in navigating to other screens in the application.
	Note: It has a link. On clicking the link, the **Business Object** screen appears where you can view the details of the respective business object.
Create Date/Time	Displays the date and time when the deferred revenue recognition schedule is created.
Status Date/Time	Displays the date and time when the deferred revenue recognition status is updated.

- **Characteristics** - Lists the characteristics defined for the deferred revenue recognition. It contains the following columns:

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Column Name	Column Description
Effective Date	Displays the date from when the characteristic is effective for the deferred revenue recognition.
Characteristic Type	Indicates the characteristic type.
Characteristic Value	Displays the value of the characteristic type.

Associated Deferred Revenue Recognitions

The **Associated Deferred Revenue Recognitions** zone Displays the basic information of the other schedules linked to the same **FT** having a separate **Schedule** due to the different **Distribution Code**. Purpose of this section is to show all the associated **Schedules** generated for a single **FT**. It contains the following columns:

Column Name	Column Description
Deferred Revenue Recognition Information	Displays information about the deferred revenue recognition.
	Note: It has a link. On clicking the link, the **Deferred Revenue Recognition** screen appears where you can view the details of the deferred revenue recognition.
Financial Transaction Information	Displays the basic information about the financial transaction corresponding to the deferred revenue recognition.
	Note: It has a link. On clicking the link, the **Financial Transaction** screen appears where you can view the details of the respective deferred revenue recognition.
Distribution Code	Displays the distribution code which indicates the template associated with the deferred revenue recognitions.
Deferred Revenue Recognition Template Information	Displays information about the deferred revenue recognition template.
	Note: It has a link. On clicking the link, the **Deferred Revenue Recognition Template** screen appears where you can view the details of the deferred revenue recognition template.
Status	Indicates the status of the associated deferred revenue recognition. The valid values are: • Active • Closed • Canceled

Recognition Schedule

The **Recognition Schedule** zone lists the adjustment information and the recognition amount of the deferred revenue recognition. It contains the following columns:

Column Name	Column Description
Recognition Date	Displays the date on which the recognition is scheduled.
Recognition Amount	Displays the amount of the recognition scheduled.
Adjustment Information	Displays information about the adjustments in recognition schedule.

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This zone contains the **Edit** button. It is used to edit the details of recognition schedule

Note: This zone appears when the deferred revenue recognition is in the **Active** status.

Revenue Recognition Items

The **Revenue Recognition Items** zone displays the adjustment information about the recognition items. It contains the following columns:

Column Name	Column Description
Recognition Date	Displays the date on which the recognition is scheduled.
Recognition Amount	Displays the amount of the recognition scheduled.
Adjustment Information	Displays information about the adjustments in recognition schedule. "
	Note: It has a link. On clicking the link, the **Adjustment** screen appears where you can view the details of the deferred revenue recognition.

Deferred Revenue Recognition - Log

The **Log** tab contains the following zone:

- Deferred Revenue Recognition Log on page 2763

Deferred Revenue Recognition Log

The **Deferred Revenue Recognition Log** zone lists the complete trail of actions performed on the deferred revenue recognition. It contains the following columns:

Column Name	Column Description
Date/Time	Displays the date and time when the action was performed on the deferred revenue recognition
Details	Displays the details about the action performed on the deferred revenue recognition
User	Indicates the user who has performed the action on the deferred revenue recognition
Log Type	Indicates the type of log.
Related Object	Indicates the object or entity which is created when the action is performed on the deferred revenue recognition.
	Note: At present, no data appears in this column. The implementation team can build the custom logic to meet the business requirements.
Status Reason	Indicates the reason why the status of the deferred revenue recognition is changed.
	Note: At present, no data appears in this column. The implementation team can build the custom logic to meet the business requirements.

Note: You can manually add a log entry for the deferred revenue recognition by clicking the **Add Log Entry** link in the upper right corner of the **Deferred Revenue Recognition Log** zone.

Related Topics

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For more information on...	See...
How to view the log of a deferred revenue recognition	Viewing the Log of a Deferred Revenue Recognition on page 2768
How to add a log entry for a deferred revenue recognition	Adding a Log Entry for a Deferred Revenue Recognition on page 2768

Editing a Deferred Revenue Recognition

Procedure

To edit a deferred revenue recognition:

1. Search for the deferred revenue recognition in the **Deferred Revenue Recognition** screen.
2. In the **Search Results** section, click the link in the **Deferred Revenue Recognition Information** column \orresponding to the deferred revenue recognition whose details you want to edit.
   The **Deferred Revenue Recognition** screen appears.
3. Click the **Edit** button in the **Deferred Revenue Recognition** zone.
   The **Deferred Revenue Recognition** screen appears.

> **Note:** The **Edit** button appears when the deferred revenue recognition is in the **Active** status.

4. Modify the required details in the **Main** section.
5. Define, edit, or remove related deferred revenue recognitions from the deferred revenue recognition, if required.
6. Define, edit, or remove characteristics of the deferred revenue recognition, if required.
7. Click **Save**.
   The changes made to the deferred revenue recognition are saved.

Related Topics

For more information on...	See...
Deferred Revenue Recognition screen	Deferred Revenue Recognition (Used for Viewing) on page 2760
Deferred Revenue Recognition zone	Deferred Revenue Recognition on page 2760
How to search for a deferred revenue recognition	Searching for a Deferred Revenue Recognition on page 2758
How to add related deferred revenue recognitions	Adding Related Deferred Revenue Recognitions on page 2766
How to define the characteristics for a deferred revenue recognition	Defining a Characteristic for a Deferred Revenue Recognition on page 2765

Creating the Deferred Revenue Recognition Schedule

Prerequisites

To create the deferred revenue recognition schedule, you should have:

- Should have **Revenue Recognition Schedule Creation Algorithm** attached in the **DRR Template**

Procedure

To create the deferred revenue recognition schedule:

1. Search for the deferred revenue recognition in the **Deferred Revenue Recognition** screen.

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2. In the **Search Results** section, click the link in the **Deferred Revenue Recognition Information** column corresponding to the deferred revenue recognition whose recognition schedule you want to generate.
   The **Deferred Revenue Recognition** screen appears.
3. Click the **Generate Schedule** button in the **Deferred Revenue Recognition** zone.

Note: The **Generate Schedule** button appears when the deferred revenue recognition is in the **Draft** status.

   The status of the deferred revenue recognition is changed to **Active**.

Related Topics

For more information on...	**See...**
Deferred Revenue Recognition screen	Deferred Revenue Recognition (Used for Viewing) on page 2760
Deferred Revenue Recognition zone	Deferred Revenue Recognition on page 2760
How to search for a deferred revenue recognition	Searching for a Deferred Revenue Recognition on page 2758

Defining a Characteristic for a Deferred Revenue Recognition

Prerequisites

To define a characteristic for a deferred revenue recognition, you should have:

- Characteristic types defined in the application (where the characteristic entity is set to **Deferred Revenue Recognition**)

Procedure

To define a characteristic for a deferred revenue recognition:

1. Ensure that the **Characteristics** section is expanded when you are editing a deferred revenue recognition.

   The **Characteristics** section contains the following fields in a grid:

Field Name	**Field Description**	**Mandatory (Yes or No)**
Effective Date	Used to specify the date from when the characteristic is effective for the deferred revenue recognition.	Yes (Conditional)
		Note: This field is required when you are defining a characteristic for the deferred revenue recognition.
Characteristic Type	Used to indicate the characteristic type.	Yes (Conditional)
	Note: The list includes only those characteristic types where the characteristic entity is set to **Deferred Revenue Recognition**.	**Note:** This field is required when you are defining a characteristic for the deferred revenue recognition.
Characteristic Value	Used to specify the value for the characteristic type.	Yes (Conditional)
	Note: On specifying the value for a characteristic type, the description of the characteristic value appears corresponding to the **Characteristic Value** field.	**Note:** This field is required when you are defining a characteristic for the deferred revenue recognition.

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2. Enter the required details in the **Characteristics** section.

> **Note:** If you select a characteristic type, the **Search** (🔍) icon appears corresponding to the **Characteristic Value** field. On clicking the **Search** icon, you can search for a characteristic value.

3. If you want to define more than one characteristic for the deferred revenue recognition, click the **Add** (+) icon and then repeat step 2.

> **Note:** However, if you want to remove a characteristic from the deferred revenue recognition, click the **Delete** (🗑) icon corresponding to the characteristic.

Related Topics

For more information on...	See...
How to edit a deferred revenue recognition	Editing a Deferred Revenue Recognition on page 2764

Adding Related Deferred Revenue Recognitions

Prerequisites

To add related deferred revenue recognitions, you should have:

- Deferred revenue recognition template defined in the system.

Procedure

To add related deferred revenue recognitions:

1. Ensure that the **Related Deferred Revenue Recognitions** section is expanded when you are editing a deferred revenue recognition.

   The **Related Deferred Revenue Recognitions** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Deferred Revenue Recognition ID	Used to specify the ID of the deferred revenue recognition. **Note:** The **Search** (🔍) icon appears corresponding to this field. On clicking the **Search** icon, the **Deferred Revenue Recognition Search** window appears.	Yes
Create Date Time	Used to indicate the creation date and time of the deferred revenue recognition.	Yes
Financial Transaction ID	Used to specify the ID of the financial transaction corresponding to the deferred revenue recognition. **Note:** The **Search** (🔍) icon appears corresponding to this field. On clicking the **Search** icon, the **Financial Transactions Search** window appears.	Yes

2. Enter the required details in the **Related Deferred Revenue Recognitions** section.
3. If you want to add more than one related deferred revenue recognition for the deferred revenue recognition, click the **Add** (+) icon and then repeat step 2.

> **Note:** However, if you want to remove a related deferred revenue recognition from the deferred revenue recognition, click the **Delete** (🗑) icon corresponding to the related deferred revenue recognition.

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Related Topics

For more information on...	See...
How to edit a deferred revenue recognition	Editing a Deferred Revenue Recognition on page 2764

Editing the Deferred Revenue Recognition Schedule Details

Prerequisites

To edit the details of the deferred revenue recognition schedule, you should have:

- Should have **Allow Editing Switch** as **Yes** on deferred revenue recognition template.

Procedure

To edit the details of the deferred revenue recognition schedule:

1. Search for the deferred revenue recognition in the **Deferred Revenue Recognition** screen.
2. In the **Search Results** section, click the link in the **Deferred Revenue Recognition Information** column corresponding to the deferred revenue recognition whose deferred revenue recognition schedule details you want to edit.

   The **Deferred Revenue Recognition** screen appears.
3. Select the recognition whose details you want to edit in the **Recognition Schedule** zone and click the **Edit** button available in the upper left corner above the table in this zone.
   The **Edit Recognition Schedule** screen appears.

   Note: A recognition schedule from the deferred revenue recognition can be edited when the deferred revenue recognition is in the **Active** status.

   The **Edit Recognition Schedule** screen contains the following fields:

Field Name	Field Description
Deferred Revenue Recognition Information	Displays the information about the deferred revenue recognition.
Financial Transaction Information	Displays the information of the financial transaction corresponding to the deferred revenue recognition.

   In addition to these fields, this screen contains following columns:

Column Name	Column Description	Mandatory (Yes or No)
Recognition Date	Used to display the date on which the deferred revenue is recognized.	Yes
Recognition Amount	Used to display the amount of the deferred revenue.	Yes
Adjustment ID	Used to display the adjustment id.	Not applicable

4. Modify the details of the recognition schedule.
5. If you want to define more than one recognition schedule for the deferred revenue recognition, click the **Add** (+) icon and then repeat step 4.

   Note: However, if you want to remove a recognition schedule from the deferred revenue recognition, click the **Delete** () icon corresponding to the recognition schedule.
6. Click **Save**.

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The changes made to the recognition schedule are saved.

Related Topics

For more information on...	See...
Recognition Schedule zone	Recognition Schedule on page 2762
How to search for a deferred revenue recognition	Searching for a Deferred Revenue Recognition on page 2758

Viewing the Log of a Deferred Revenue Recognition

Procedure

To view the log of a deferred revenue recognition:

1. Search for the deferred revenue recognition in the **Deferred Revenue Recognition** screen.
2. In the **Search Results** section, click the link in the **Deferred Revenue Recognition Information** column corresponding to the deferred revenue recognition whose log you want to view.

   The **Deferred Revenue Recognition** screen appears. It consists of the following tabs:

   - Deferred Revenue Recognition - Main on page 2760
   - Deferred Revenue Recognition - Log on page 2763
3. Click the **Log** tab.
   The **Log** tab appears.
4. View the complete trail of actions performed on the deferred revenue recognition in the **Deferred Revenue Recognition Log** zone.

Column Name	Column Description
Date/Time	Displays the date and time when the action was performed on the dispute request.
Details	Displays the details about the deferred revenue recognition log
User	Indicates the user who has performed deferred revenue recognition
Log Type	Indicates the type of log.
Related Object	Indicates the object or entity which is generated when the action is performed on the deferred revenue recognition
Status Reason	Displays the status reason of action performed on the deferred revenue recognition

Related Topics

For more information on...	See...
Deferred Revenue Recognition Log zone	Deferred Revenue Recognition Log on page 2763
How to search for a deferred revenue recognition	Searching for a Deferred Revenue Recognition on page 2758
How to add a log entry for a deferred revenue recognition	Adding a Log Entry for a Deferred Revenue Recognition on page 2768

Adding a Log Entry for a Deferred Revenue Recognition

Procedure

To add a log entry for a deferred revenue recognition:

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1. Search for the deferred revenue recognition in the **Deferred Revenue Recognition** screen.
2. In the **Search Results** section, click the link in the **Deferred Revenue Recognition Information** column *c*orresponding to the deferred revenue recognition whose log you want to edit.

   The **Deferred Revenue Recognition** screen appears. It consists of the following tabs:.

   - Deferred Revenue Recognition - Main on page 2760
   - Deferred Revenue Recognition - Log on page 2763
3. Click the **Log** tab.
   The **Log** tab appears.
4. Click on the **Add Log Entry** link in the upper right corner of the **Deferred Revenue Recognition Log** zone.
   The **Add Deferred Revenue Recognition Schedule Log** window appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes Or No)
Deferred Revenue Recognition Information	Displays information about the deferred revenue recognition.	Not applicable
Log Details	Used to specify additional comments for the deferred revenue recognition.	Yes

5. Enter the comments in the **Log Details** field.
6. Click **Save**.
   The log entry is added in the **Deferred Revenue Recognition Log** zone.

Related Topics

For more information on...	See...
Deferred Revenue Recognition Log zone	Deferred Revenue Recognition Log on page 2763
How to search for a deferred revenue recognition	Searching for a Deferred Revenue Recognition on page 2758

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Chapter 35

Reconciliation

Topics:

- Pre-requisites
- Reconciliation of Individual Health Insurance Subsidy Payments
- Reconciliation Discrepancy Report of Individual Health Insurance Subsidy Payments
- Deferred Processing Mode for Discrepancy Report Creation
- Reconciliation Status Transition
- Pay Instruction Status Transition
- Discrepancy Report Status Transition
- EDI 820 File Format For Reconciliation
- Sample EDI 820 File Format
- Algorithms Used in C1-MemberReconType
- Algorithms Used in C1-MemberReconciliation
- Algorithms Used in C1-PayInstruction
- Algorithms Used in C1-MemberDiscReportType
- Algorithms Used in C1-DiscrepancyReport
- Reconciliation Type
- Reconciliation (Used for Searching)
- Reconciliation (Used for Viewing)
- Pay Instruction (Used for Viewing)
- Discrepancy Report Type
- Discrepancy Report (Used for Searching)

Oracle Revenue Management and Billing enables you to reconcile pay instructions received from the external system against the bill segments based on the account identifier, policy number, plan number, member identifier, and coverage period combination. The system enables you to upload a pay instruction file in the following formats:

- CSV File Format - You can upload pay instruction files in the CSV format from the specified location on the server using the **Pay Instruction CSV File Upload (C1-RECUP)** batch.
- EDI 820 File Format - You can upload pay instruction files in the EDI 820 file format from the specified location on the server using the **Upload Lockbox Payment and Pay Instruction Files (C1-PUPSG)** batch.

> **Note:** The **BPR** tag in the EDI 820 file must be set to **I** to indicate that the file contains pay instructions for reconciliation.

While uploading pay instruction files, you need to specify the reconciliation type using which you want to create the reconciliation. A reconciliation type indicates the algorithm which validates the pay instruction file and creates a pay instruction for each record in the file. Two algorithm types named **C1-PAYINSUPL** and **C1-RECONPROC** are shipped with the product. You need to maintain separate reconciliation types for different file formats. If you want to use a reconciliation type while uploading a pay instruction file in the CSV format, you need to create an algorithm using the **C1-PAYINSUPL** algorithm type and attach it to the reconciliation type. However, if you want to use a reconciliation type while uploading a pay instruction file in the EDI 820 format, you need to create an algorithm using the **C1-RECONPROC** algorithm type and attach it to the reconciliation type.

Once a file is successfully validated, the reconciliation is created for the file in the **Draft** status. The reconciliation is immediately transitioned to the **Send Notification** status and the algorithms attached to the Send Notification status are executed. Once the To Do is created, the status of the reconciliation is changed to **Pending**. A pay instruction is created for each record in the file and its status is set to either **Pending** or **Error** depending on whether it is successfully validated or not.

You need to then specify the payment ID against which you want to reconcile the billed items for which you have received the pay instructions. Once you specify the payment information and submit the pay instructions for reconciliation, the payment amount is distributed against the reconciliation contract of the accounts for which you have received the pay instruction. The status of the reconciliation is changed to **Pending Reconciliation**.

On reconciling the pay instructions, the system finds the bill segment against which the pay instruction must be reconciled using the account identifier, policy number, plan number, member identifier, and coverage period combination.

- Discrepancy Report (Used for Viewing)
- Member Reconciliation Preference

Once the bill segment is identified, the transfer adjustment is created against the bill segment and offset adjustment is created against the respective reconciliation contract. If all pay instructions in the file are successfully reconciled, the status of the reconciliation is changed to **Completed**. However, if one or more pay instruction in the file could not be successfully reconciled, the status of the reconciliation is changed to **Open**. If a file contains a pay instruction for previous coverage period, then system checks whether there is any open pay instruction for that coverage period in the system and accordingly tries to reconcile the pay instruction. However, if an open pay instruction for that coverage period does not exist in the system, the system tries to reconcile the pay instruction against the billed item.

You may manually reconcile the pay instructions which are in the **Pending Reconciliation** status. Alternatively, you can execute the **Reconciliation Periodic Monitor (C1-RCNM)** batch at regular interval to reconcile the pay instructions.

During reconciliation, a pay instruction also goes through various statues in its lifecycle. You may configure the following two batches to execute at the regular intervals:

- **Pay Instruction Periodic Monitor (for Pending Status) (C1-PIPMO)** - It monitors whether there are any pay instructions in the **Pending** status. If so, it tries to reconcile the pay instruction against a billed item. If the pay instruction is successfully reconciled, the status of the pay instruction is changed to **Completed**. However, if the pay instruction could not be reconciled, the status of the pay instruction is changed to **Open**.
- **Pay Instruction Periodic Monitor (for Open Status) (C1-PIMDF)** - It monitors whether there are any pay instructions in the **Open** status. If so, it tries to reconcile the pay instruction against a billed item. If the pay instruction is successfully reconciled, the status of the pay instruction is changed to **Completed**. However, if the pay instruction could not be reconciled, the status of the pay instruction is changed to **Open**.

If you cancel the payment tender, the payment and reconciliation associated with the payment are automatically canceled. The status of the reconciliation is changed to **Pending Cancelation**. And, the status of all pay instructions in the reconciliation is changed to **Canceled**. If required, you can manually cancel a reconciliation. However, you can cancel a reconciliation when it is in the **Open** or **Completed** status. On canceling a reconciliation, the status of the reconciliation is changed to **Pending Cancelation** and the status of all pay instructions in the reconciliation is changed to **Canceled**.

You need to configure the **Reconciliation Cancellation Periodic Monitor (C1-RCNMD)** batch to execute at the regular intervals. It monitors whether there are reconciliations in the **Pending Cancelation** status. If there is a reconciliation in the **Pending Cancelation** status, the status of the reconciliation is changed to **Canceled**.

The system enables you to create a copy of reconciliation when it is in the **Canceled** status. If the number of pay instructions in the reconciliation does not exceed the value specified in the **Defer Processing Count** option type of the **C1-RECDUPBH** feature configuration, a copy of the reconciliation and pay instructions is created in the real time (i.e. immediately). The status of the reconciliation is set to **Pending**. And, the status of the pay instruction is set to either **Pending** or **Error** depending on whether it is successfully validated or not.

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However, if the number of pay instructions in the reconciliation exceeds the value specified in the **Defer Processing Count** option type of the **C1-RECDUPBH** feature configuration, a batch job is automatically created using the **Duplicate Reconciliation (C1-RECDU)** batch. A message appears indicating the batch job ID. This batch job creates a copy of the reconciliation and pay instructions. The status of the reconciliation is set to **Pending**. And, the status of the pay instruction is set to either **Pending** or **Error** depending on whether it is successfully validated or not.

If the policy number, plan number, and member identifier are specified in a pay instruction, then the pay instruction is reconciled at the main subscriber level. If the policy number and plan number are specified in a pay instruction, then the pay instruction is reconciled at the plan level. However, if the policy number is only specified in a pay instruction, then the pay instruction is reconciled at the policy level.

On reconciling, some pay instructions are fully reconciled against the bill segments, some pay instructions are partially reconciled against the bill segments, and some pay instructions are not reconciled against any bill segments. The system enables you to capture such discrepancies for the reporting purposes. If required, you can generate the discrepancy report at the file or account level. If you generate the discrepancy report at the file level, the system lists the following:

- All pay instructions in the file which were partially reconciled due to rate variance
- All pay instructions in the file which could not be reconciled as the amount was paid, but not yet billed

However, if you generate the discrepancy report at the account level, the system lists the following:

- All billed items which were partially reconciled against pay instructions due to rate variance
- All billed items which could not be reconciled as the amount was billed, but not yet paid
- All pay instructions for the account which could not be reconciled as the amount was paid, but not yet billed

While generating a discrepancy report, you need to specify the discrepancy report type using which you want to create the discrepancy report. Once you review and finalize the discrepancy report, its status is changed to **Completed**. At a time, you can only have one discrepancy report for the file or account in the **Pending** status. Until, you finalize a discrepancy report, you cannot create another discrepancy report for the file or account. Also, note that you can create a discrepancy report for a file only when its corresponding reconciliation is in the **Open** status.

The reconciliation process goes through various statuses in its entire lifecycle. For more information about the reconciliation statuses, see...

- Reconciliation Status Transition on page 2778
- Pay Instruction Status Transition on page 2779
- Discrepancy Report Status Transition on page 2781

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Pre-requisites

To setup the Member to Member Reconciliation feature, you need to do the following:

- **Configure the following Characteristics:**
  - Define an account eligible for reconciliation process from an **On-Account Contract** of a Universal Generic account.
  - Populate the Policy ID, or Plan ID, or Membership ID linked with the billable charges.
- Define the bills having the status as **Completed** for reconciliation.
- Define the **Contract Types** for reconciliation.
- Ensure that payment on **Suspense Contract** is available to match against the bills.
- Configure the **Customer Class** algorithm for a payer account.

Reconciliation of Individual Health Insurance Subsidy Payments

Several states have established health insurance exchanges to offer health and dental insurance coverage options to their respective residents. Individuals within these states can compare and purchase coverage from a selection of health and dental plans, which are referred to as Qualified Health Plan (QHP).

Individuals who enroll for these QHPs may be eligible for Federal Tax Credits and Cost-Sharing Reductions (CSRs), which are subsidies based on the subscriber's income, to help pay for their health insurance and lower their out-of-pocket costs. The Centers for Medicare & Medicaid Services (CMS) makes monthly payments to insurers for the individuals who receive these credits.

CMS has established and instituted the State-Based Exchange (SBE) or Federally Facilitated Marketplace (FFM) reconciliation process to ensure that insurers enrollment information aligns with Marketplace enrollment information. The dispute process provides a mechanism for insurers to correct an FFM enrollment record or related payment information that the monthly reconciliation process cannot resolve.

Oracle Revenue Management and Billing (ORMB) may receive either the exact or different payment amount from the exchange for the sponsored charges due to various reasons. ORMB now enables you to reconcile the payments from the exchange against the bill line items for the fully insured individual business, thereby ensuring that the discrepancy is identified and resolved on time to quickly recover the money from CMS via the dispute process.

The reconciliation process in ORMB is enhanced to support both the fully insured group business and fully insured individual business. For the fully insured group business, the system stamped the policy ID and plan ID in the **C1_FT_EXT** table while freezing a financial transaction on the bill completion. These details were later used to reconcile the pay instructions against the bill line items. In this release, the **C1-STMPFTINF** algorithm type (which is attached on the **FT Freeze** system event of a customer class) is enhanced to support the fully insured individual business. It stamps the health plan code and price item in the **C1_FT_EXT** table while freezing a financial transaction on the bill completion for the fully insured individual business. These details are later used to reconcile the pay instructions received from the exchange against the bill line items of the exchange account.

A new field named **Reconciliation Category** is available while defining a reconciliation type. It helps to differentiate between the fully insured group and fully insured individual reconciliation objects. If you want to upload and process a pay instruction file for a fully insured group business using a reconciliation type, you must set the reconciliation category of the reconciliation type to **Group**. However, if you want to upload and process a pay instruction file for a fully insured individual business using a reconciliation type, you must set the reconciliation category of the reconciliation type to **Individual**.

A new algorithm type named **C1-PAYINSEXC** is introduced in this release. You need to attach an algorithm created using the **C1-PAYINSEXC** algorithm type to the **Upload Pay Instructions** system event of a reconciliation type where the reconciliation category is set to **Individual**. This algorithm parses a pay instruction file which is received from the

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exchange. It reads each record in the pay instruction file and creates one or more pay instructions in a reconciliation object depending on the number of exchange payment types received in the record. For example, if a record contains information about two exchange payment types (i.e. EP1 and EP2), the system will create two pay instructions for the record - one for EP1 and another for EP2. The exchange payment types (i.e. health insurance coverage) maintained in the CMS system might be different from the price items maintained in ORMB. Therefore, ORMB enables you to map an exchange payment type with a price item using the **C1-PayTypePrcItemMap** extendable lookup. Note that no values are shipped for this extendable lookup from the product. You need to create a value for the **C1-PayTypePrcItemMap** extendable lookup wherein each payment type received from the exchange is mapped to a price item. You can map a price item to one or more payment types based on the requirements.

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

- **Pay Instruction Business Object** - Used to indicate the business object using which you want to create a pay instruction.
- **Date Format** - Used to indicate the format in which you want to store the coverage period start and end dates.
- **Payment Type - Price Item mapping** - Used to indicate the **C1-PayTypePrcItemMap** extendable lookup value using which you want the system to derive the price item for each payment type received from the exchange.

The system enables you to upload a pay instruction file received from the exchange in the CSV file format. You can upload pay instruction files in the CSV format from the specified location on the server using the **Pay Instruction CSV File Upload (C1-RECUP)** batch. While receiving a pay instruction file from the exchange, you need to ensure that each record in the pay instruction file contains the following information:

- Payor (i.e. exchange person) or its account from where the payment is received
- Subscriber (i.e. individual membership) for whom the payment is received
- Health plan and its coverage period for which the payment is received
- At least one exchange payment type (i.e. health insurance coverage) and its subsidy amount which is sponsored by the exchange

Note:

The system assumes that the exchange person will have only one account. Therefore, if an exchange person has multiple accounts, the system will not allow you to upload and process a pay instruction file received from the respective exchange. Hence, if the exchange person has a single account in the system, you can either provide the payor or its account details in the record. However, if the exchange person has multiple accounts in the system, you must provide the payor's account details in the record.

You can create an exchange person and its account in the system through the health care inbound message. While creating an account for an exchange person, ensure that you set the **Eligible for Member Reconciliation (C1-RCELG)** characteristic of the account to **Y**.

You can specify either the health plan code or Health Insurance Oversight System (HIOS) ID in the record. If you are planning to use the Health Insurance Oversight System (HIOS) ID for a health plan, you need to attach an algorithm created using the **C1-STMPHLPN** algorithm type to the **Enter** system event (with the lowest sequence number) of the **Pending** status in the **C1-MemberReconciliation** business object. This algorithm will then derive the code of the health plan, to which the individual is enrolled for the coverage period, using the HIOS ID. Note that, while creating a pay instruction, the system will derive the health plan code when the HIOS ID is present in the record irrespective of whether the health plan code is present in the record or not. However, if the HIOS ID is not present in the record, the system will use the health plan code that is present in the record.

If a subscriber has enrolled for multiple insurance coverages of a health plan for the same coverage period and if the subscriber is eligible for subsidy for one or more insurance coverages, you will receive the subsidy amount for the respective insurance coverages from the CMS system. The subsidy information is received in the form of exchange payment type and amount. At a time, you can specify maximum 10 exchange payment types and their amounts in each record of a pay instruction file.

The **C1-RECUP** batch is enhanced to support the fully insured individual business. On executing the **C1-RECUP** batch, the system reads the pay instruction file from the specified location and validates it. Once a file is successfully validated, the reconciliation object is created for the file in the **Draft** status. The reconciliation object is immediately transitioned

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to the **Send Notification** status and the algorithms attached to the **Send Notification** status are executed. Once the To Do is created, the status of the reconciliation object is changed to **Pending**. One or more pay instructions are created for a record of a pay instruction file and its status is set to either **Pending** or **Error** depending on whether it is successfully validated or not. While creating a pay instruction, the system derives the health plan code (if not available), individual membership and the exchange account. For more information about the **C1-RECUP** batch, refer to *Oracle Revenue Management and Billing Batch Guide*.

You need to then specify the payment ID against which you want to reconcile the bill line items for which you have received the pay instructions. Once you specify the payment information and submit the pay instructions for reconciliation, the payment amount is distributed against the reconciliation contract of the exchange accounts for which you have received the pay instruction. The status of the reconciliation object is changed to **Pending Reconciliation**. On reconciling the pay instructions, the system finds the open and unmatched bill line item of the exchange account against which the pay instruction must be reconciled using the health plan, subscriber, price item, and coverage period combination. The system creates a reconciliation adjustment for a pay instruction which is successfully reconciled. While reconciling the pay instructions, the system sets the pay instruction matching level characteristic type of the reconciliation object to **MEMBER**.

You can manually reconcile the pay instructions of a reconciliation object, or you can execute the **Reconciliation Periodic Monitor (C1-RCNM)** or **Pay Instruction Processing Batch (C1-RCPM)** batch at regular intervals to reconcile the pay instructions.

Note: While executing the **C1-RCPM** batch, you need to specify a member reconciliation preference whose attributes you want to use while reconciling all pay instructions of a file at the member level.

For more information about the above batches, refer to *Oracle Revenue Management and Billing Batch Guide*.

If you attach an algorithm created using the **C1-VALMRPYCN** algorithm type to the **Payment Cancellation** system event of the required customer class, the system automatically cancels the payment and reconciliation object associated with the payment when you cancel its corresponding payment tender. The status of the reconciliation object is changed to **Pending Cancelation** and the status of all pay instructions in the reconciliation object is changed to **Canceled**.

If required, you can also manually cancel a reconciliation object. However, you can cancel a reconciliation object only when it is in the **Open** or **Completed** status. On canceling a reconciliation object, the status of the reconciliation object is changed to **Pending Cancelation**. Before canceling a pay instruction, the reconciliation adjustment (if any) corresponding to the pay instruction is also canceled.

You need to configure the **Reconciliation Cancellation Periodic Monitor (C1-RCNMD)** batch to execute at the regular intervals. This batch monitors whether there are any reconciliation objects in the **Pending Cancelation** status. If there is a reconciliation object in the **Pending Cancelation** status, the status of the reconciliation object and the status of all pay instructions in the reconciliation object is changed to **Canceled**. For more information about the **C1-RCNMD** batch, refer to *Oracle Revenue Management and Billing Batch Guide*.

If all pay instructions in a reconciliation object are successfully reconciled, the system changes the status of the reconciliation object to **Completed**. However, if one or more pay instruction in a reconciliation object is not successfully reconciled, the system changes the status of the reconciliation object to **Open**. If you want the system to automatically reconcile the open pay instructions of the account when you bill the account each time, you need to attach an algorithm created using the **C1-RCLOPNRCN** algorithm type to the **Post Bill Completion** system event of the required customer class. The system will then trigger the reconciliation process to reconcile the open pay instruction against the open and unmatched bill line item of the exchange account and will accordingly update the status of the pay instruction and reconciliation object.

If you attach an algorithm created using the **C1-VLPYINACN** algorithm type to the **Adjustment Cancellation** system event of the adjustment type (using which the reconciliation adjustments are created), the system ensures that no one can cancel a reconciliation adjustment until it is linked to a non-canceled pay instruction.

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Reconciliation Discrepancy Report of Individual Health Insurance Subsidy Payments

Until now, you were able to generate the reconciliation discrepancy report at the file or account level for the fully insured group business. Now, in addition, you can generate the reconciliation discrepancy report at the file or account level for the individual health insurance subsidy payments. If you generate the discrepancy report at the file level, the system lists the following:

- All pay instructions in the file which were partially reconciled due to rate variance
- All pay instructions in the file which could not be reconciled as the amount was paid, but not yet billed

However, if you generate the discrepancy report at the account level, the system lists the following:

- All bill line items which were partially reconciled against pay instructions due to rate variance
- All bill line items which could not be reconciled as the amount was billed, but not yet paid
- All pay instructions for the account which could not be reconciled as the amount was paid, but not yet billed

While generating a discrepancy report, you need to specify the discrepancy report type using which you want to create the discrepancy report. The system will create the discrepancy report in either **Pending** or **Deferred Processing** status. Once you review the discrepancy line items and finalize the discrepancy report, its status is changed to **Completed**.

At a time, you can only have one discrepancy report for a file or an account in the **Pending** or **Deferred Processing** status. Until you finalize a discrepancy report, you cannot create another discrepancy report for the respective file or account. Also, note that you can create a discrepancy report for a file only when its corresponding reconciliation object is in the **Open** status.

When you generate a discrepancy report for a pay instruction file which is received from the exchange or when you generate a discrepancy report for an exchange account, the system displays the following additional information for each discrepancy line item along with other details:

- Payor Identifier Type
- Payor Identifier
- Health Plan
- HIOS ID
- Payment Type

Note: Policy number and plan number are displayed instead of the above information when you generate discrepancy report for the fully insured group business.

Deferred Processing Mode for Discrepancy Report Creation

Until now, the reconciliation discrepancy report at the file or account level was only created in the online mode (i.e. immediately). Now, the system provides you with the ability to configure deferred processing mechanism for the reconciliation discrepancy report creation. A new status named **Deferred Processing** is introduced in the lifecycle of the **C1-DiscrepancyReport** business object. On generating a discrepancy report at the file or account level, the discrepancy report is created in the **Draft** status. A new algorithm named **C1-DISCDEF** is attached to the **Enter** system event of the **Draft** status. This algorithm checks whether the number of pay instructions in the non-final status exceeds the deferred count specified in the algorithm. If the number of pay instructions in the non-final status does not exceed the deferred count, the status of the discrepancy report is changed to **Pending**. The system then adds the discrepancy line items in the discrepancy report by comparing each non-final pay instruction against the open and unmatched bill line item of the exchange account.

However, if the number of pay instructions in the non-final status exceeds the deferred count, the status of the discrepancy report is changed to **Deferred Processing**. A new batch named **C1-DRMT** is introduced in this release. This batch

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is used to monitor or check whether there are any discrepancy reports in the **Deferred Processing** status. If there is a discrepancy report in the **Deferred Processing** status, the batch changes the status of the discrepancy report to **Pending**. Then, the system adds the discrepancy line items in the discrepancy report by comparing each non-final pay instruction against the open and unmatched bill line item of the exchange account.

This batch is a multi-threaded batch. The multi-threading is based on discrepancy request ID and chunks for multi-threading are created based on numerical distribution of discrepancy request ID. This batch contains the following parameters:

Parameter Name	Mandatory (Yes or No)	Description
Maintenance Object	Yes	Used to indicate that you want to monitor discrepancy reports which are created using the business objects of a particular maintenance object. **Note:** By default, the parameter value is set to **C1-DISCR-RPT**.
Restrict by Batch Code	No	Used when you want to monitor discrepancy reports whose current status is linked to the **Discrepancy Report Monitor (C1-DRMT)** batch. The valid value is **true**.
Restrict by Discrepancy Report Type	No	Used when you want to monitor the discrepancy reports which are created using a particular discrepancy report type.
Restrict by Business Object	No	Used when you want to monitor discrepancy reports which are created using a particular business object.
Restrict by Status Code	No	Used when you want to monitor discrepancy reports which are in a particular status. **Note:** This parameter is useful when this batch is invoked from more than one status in the lifecycle of the business object.
Override maximum errors	No	Used to override the maximum number of errors after which the batch must be terminated.
Threadpool	No	Used to specify the thread pool on which you want to execute the batch.

Reconciliation Status Transition

The following figure graphically indicates how a reconciliation goes through various statuses in its lifecycle:

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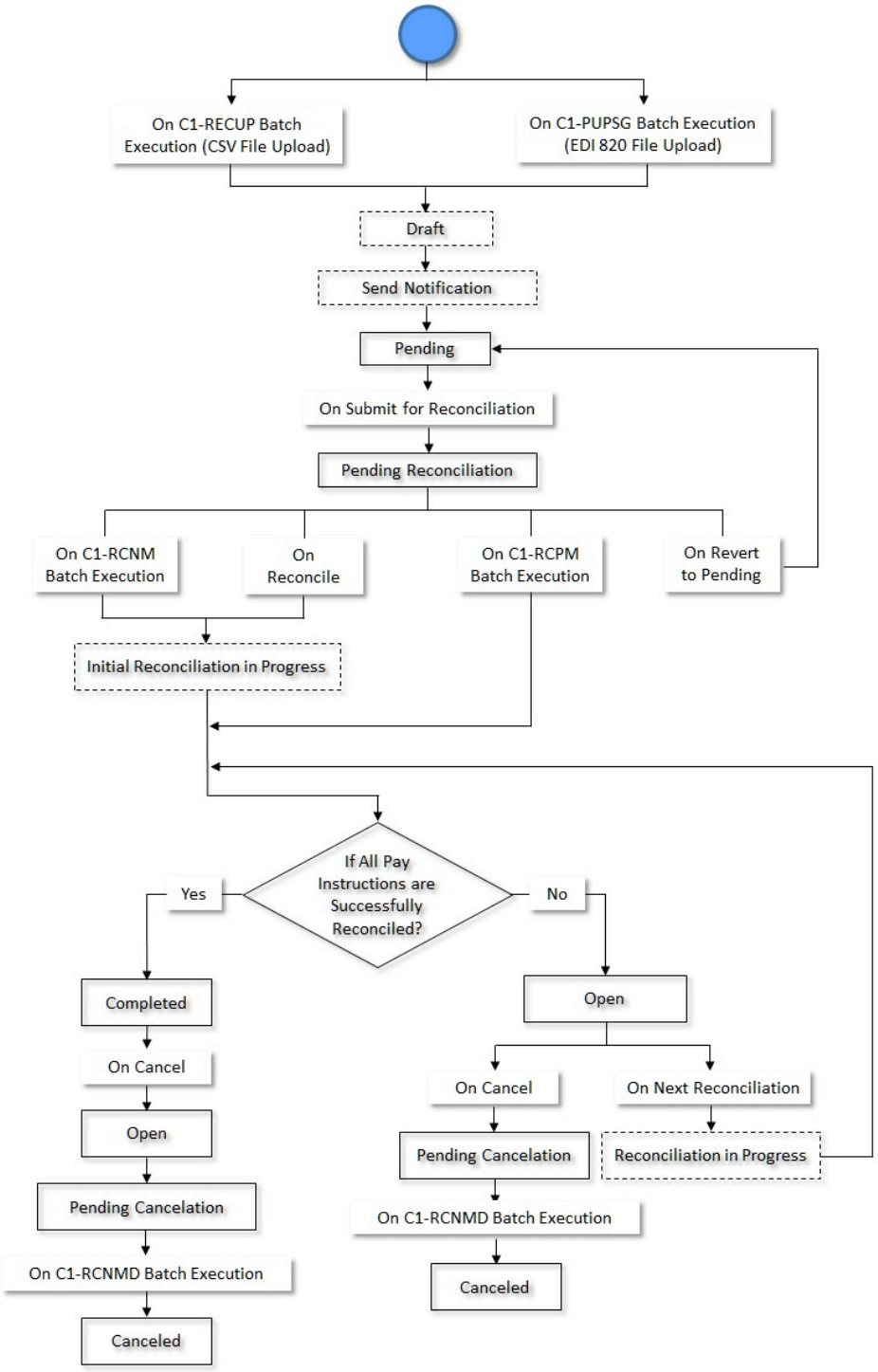

Pay Instruction Status Transition

The following figure graphically indicates how a pay instruction goes through various statuses in its lifecycle:

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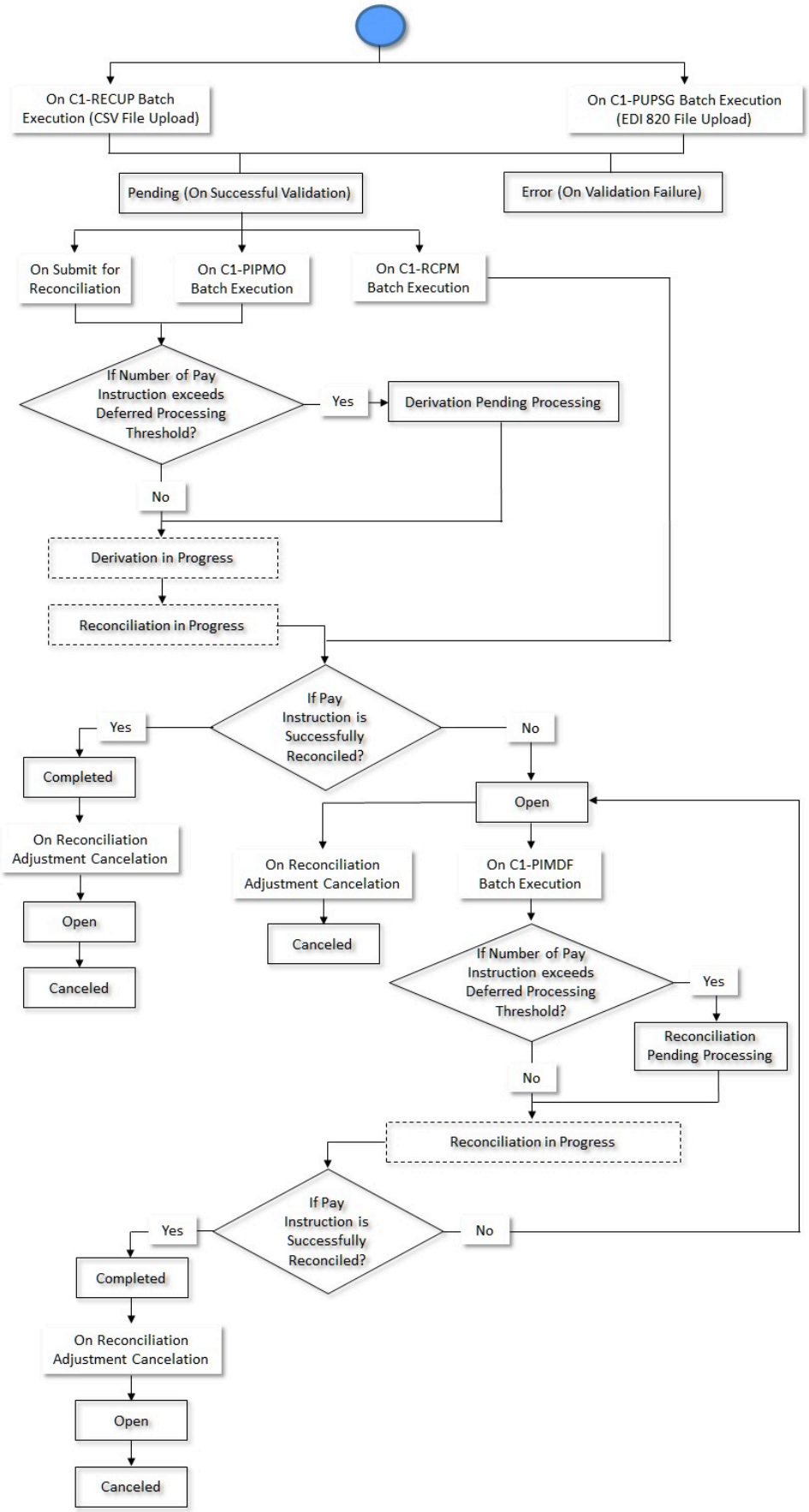

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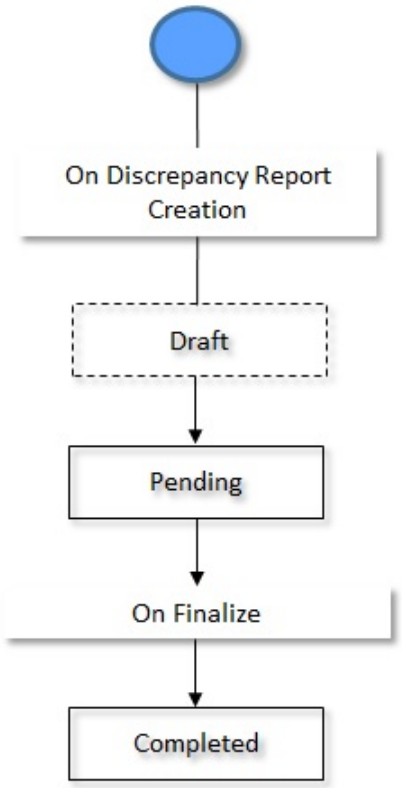
Discrepancy Report Status Transition

The following figure graphically indicates how a Discrepancy Report goes through various statuses in its lifecycle:



EDI 820 File Format For Reconciliation

Before uploading an EDI 820 file, you need to ensure that the EDI 820 file contains the following columns:

Tag	Attribute	Description	Mandatory (Yes or No)
Algo Param	Account Identifier Type	Used to specify the account identifier type. The valid values are: • Account Name • Base Global Account ID • Bill Group Identifier • Demo Bank Account Number • External Account Identifier • Flexcube Account ID • International Bank Account Number	Yes (Conditional) **Note:** This data is required when Account Identifier is provided.
N1[3]	Account Identifier value	Used to specify the value of the account identifier type.	Yes (Conditional) **Note:** This data is required when Account Identifier Type is provided.

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Tag	Attribute	Description	Mandatory (Yes or No)
Batch Param	Member Identifier type	Used to specify the member identifier type.	Yes
RMR[2]	Policy Number	Used to specify the policy number of the member.	Yes
Algo Param	Plan Number	Used to specify the plan number of the member.	No
ENT[4]	Member Identifier Value	Used to specify the value of the member identifier type.	Yes
RMR[4]	Amount	Used to specify the amount that has to be paid to the member.	Yes **Note:** The data value of this column must be 0, if no amount is provided.
DTM[6]	Coverage Start Date	Used to specify the date of the policy from where the coverage starts. **Note:** The Coverage Start Date cannot be later than the coverage end date.	Yes
DTM[6]	Coverage End Date	Used to specify the date of the policy till when the coverage ends. **Note:** The coverage end date cannot be earlier than the coverage start date.	Yes
NM1[4][5]	Member Name	Used to specify the name of the member.	Yes
REF[2]	Plan Number	Used to specify the plan number of the member.	Yes (Conditional) **Note:** This data is required when Algo Param tag does not have a value.
Batch Param	Reconciliation Type	Used to specify the type of reconciliation.	Yes
Batch Param	Reconciliation Cancel Status	Used to specify the Reconciliation Cancelation status.	Yes

Sample EDI 820 File Format

ISA*00**00**ZZ*USBANK*ZZ*UHGI*091212*1013*U*00401*000000005*0*P*~

GS*RA*LBTEST01*UHGI*20120912*1013*4*X*004010~

ST*CHK*000000001~

BPR*I*100*C*NON******1581282972******20130326~

DTM*582****RD8*20170101-20171231~

N1*PE**FI*vinodwReconTest534~

ENT*1*2J*EI*vinodwReconTest534~

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NM1*QE*1**vinodwReconTest534****N*11254331870~

RMR*AZ*12345**0~

DTM*582****RD8*20170401-20170430~

ENT*1*2J*EI*vinodwReconTest534~

NM1*QE*1**vinodwReconTest534****N*11254331870~

RMR*AZ*12345**0~

DTM*582****RD8*20170501-20170531~

ENT*1*2J*EI*vinodwReconTest534~

NM1*QE*1**vinodwReconTest534****N*11254331870~

RMR*AZ*12345**0~

DTM*582****RD8*20170601-20170630~

SE*1*000000001~

GE*1*135260~

IEA*1*505043666~

Here the tags ISA and IEA resemble Bank Details, whereas LBTEST01 indicates Tender Source information.

Tags like GS and GE, ST and SE are known as Start and End Tags. All of the other tags are embedded inside these Start and End tags.

For more information about the EDI 820 file format, see topic EDI 820 File Format For Reconciliation on page 2781

Algorithms Used in C1-MemberReconType

The following table lists the algorithms which are attached to the **C1-MemberReconType** business object:

System Event	Algorithm	Algorithm Type	Description
Pre-Processing	C1-REOCNPEP	C1-REOCNPEP	Refer to C1-REOCNPEP on page 2783

C1-REOCNPEP

This algorithm validates a reconciliation type.

It checks the following:

- A duplicate algorithm is not added.
- A duplicate characteristic type is not added.

In addition, it does not allow you to:

- Delete a reconciliation type when the corresponding reconciliation is in a status other than **Completed** or **Canceled**.

Algorithms Used in C1-MemberReconciliation

The following table lists the algorithms which are attached to the **C1-MemberReconciliation** business object:

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System Event	Algorithm	Algorithm Type	Description
Information	C1-RECONINFO	C1-RECONINFO	Refer to C1-RECONINFO on page 2785
Validation	C1-MRECONVAL	C1-MRECONVAL	Refer to C1-MRECONVAL on page 2785

The following table lists the algorithms which are used in the lifecycle of the **C1-MemberReconciliation** business object:

Status	System Event	Algorithm	Algorithm Type	Description
Draft	-	-	-	-
Send Notification	Monitor	F1-AT-RQJ	F1-GEN-BOMNJ	Refer to F1-AT-RQJ on page 225
	Enter	C1-RCNCRETD	F1-TDCREATE	Refer to F1-TDCREATE on page 2785
Pending	Enter	C1-VALPAYINS	C1-VALPAYINS	Refer to C1-VALPAYINS on page 2786
	Exit	F1-TODOCOMPL	F1-TODOCOMPL	Refer to F1-TODOCOMPL on page 1469
Pending Reconciliation	Monitor	F1-AT-RQJ	F1-GEN-BOMNJ	Refer to F1-AT-RQJ on page 225
	Enter	C1-RECONVAL	C1-RECONVAL	Refer to C1-RECONVAL on page 2785
	Enter	C1-TRNPAYRCN	C1-TRNPAYRCN	Refer to C1-TRNPAYRCN on page 2788
Initial Reconciliation In Progress	Monitor	C1-MONPAYINS	C1-MONPAYINS	Refer to C1-MONPAYINS on page 2787
	Enter	C1-RCOPNPYIN	C1-RCOPNPYIN	Refer to C1-RCOPNPYIN on page 2788
	Exit	C1-RCNOPNMR	C1-RCNOPNMR	Refer to C1-RCNOPNMR on page 2788
Open	-	-	-	-
Reconciliation In Progress	Monitor	C1-MONPAYINS	C1-MONPAYINS	Refer to C1-MONPAYINS on page 2787
	Enter	C1-RCOPNPYIN	C1-RCOPNPYIN	Refer to C1-RCOPNPYIN on page 2788
Completed	-	-	-	-
Pending Cancellation	Monitor	C1-RCMONPNCN	C1-GNBOMNRSN	Refer to C1-RCMONPNCN on page 2789
Cancelled	Enter	C1-CANPAYINS	C1-CANPAYINS	Refer to C1-CANPAYINS on page 2789
	Enter	C1-CANRCNPAY	C1-CANRCNPAY	Refer to C1-CANRCNPAY on page 2789
	Enter	C1-RCNCANLTD	F1-TDCREATE	Refer to C1-RCNCANLTD on page 2789
Void	-	-	-	-

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C1-RECONINFO

This algorithm generates the reconciliation information string which appears throughout the application. It concatenates the following fields separated by a comma in the specified order:

- Reconciliation Type Description
- Reconciliation Status
- Reconciliation ID

C1-RECONVAL

This algorithm is invoked when the status of the reconciliation is changed to **Pending Reconciliation**. It validates the following before the pay instructions are reconciled:

- The reconciliation is associated with the payor account against which the payment is made.
- At least one pay instruction exists in the reconciliation.
- The reconciliation is associated with a payment which is in the Frozen status.
- The payment amount is equal to the total payment instruction amount.

C1-MRECONVAL

This algorithm is invoked when you submit the pay instruction file for reconciliation. It checks the following:

- The payment is not associated with any other reconciliation which is in the status other than **Pending Cancelation** or **Canceled**.
- The payment ID and payor account ID are both available for further processing.

It contains the following parameters:

- **Reconciliation Canceled Status** - Used to specify the status code to which the reconciliation in the **Pending Cancelation** status is transitioned when the **Reconciliation Cancelation Periodic Monitor (C1-RCNMD)** batch is executed.
- **Reconciliation Pending Cancelation Status** - Used to specify the status code to which the reconciliation is transitioned when you click the **Cancel** button.

Both these parameters are mandatory.

F1-AT-RQJ

This algorithm transitions the current status of the business object to the specified status. It contains the following parameters:

- **Next Status** – Used when you want to override the default next status specified in the lifecycle.
- **Next Transition Condition** – Used when you want to override the default next transition condition specified in the lifecycle.

At a time, you can specify value for either the **Next Status** or **Next Transition Condition** parameter. If you don't specify any value for these parameters, the system will transition the business object to the default next status specified in its lifecycle.

F1-TDCREATE

This algorithm is invoked when the status of the reconciliation is changed to **Send Notification**. It creates a To Do using the specified To Do type and assigns it to users with the specified To Do role.

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It contains the following parameters:

- **To Do Type** - Used to specify the type of notification that you want to generate when the reconciliation is created for a pay instruction file.
- **To Do Role** - Used to specify the To Do role to indicate the users to whom you want to send the notification when the reconciliation is created for a pay instruction file.

The rest of the parameters, such as **To Do Type Element Name**, **To Do Role Element Name**, **Message Category**, **Message Number**, **Characteristic Type For Log Entry**, **To Do Sort Keys Retriever Script**, **Discard Cancel Terminate Reason Element**, **Discard Cancel Terminate Reason**, **Retry Frequency**, and **Retry Frequency Element Name**, are not used at the moment.

C1-VALPAYINS

This algorithm is invoked when the status of the reconciliation is changed to **Pending**. Once a pay instruction is created, this algorithm validates the following:

- The coverage end date is not earlier than the coverage start date.
- Either the account identifier type and account identifier or the account ID is available in the pay instruction record.
- The member identifier type is available when the member identifier is specified and vice versa.
- A person with the given member identifier type and member identifier combination exists in the system.
- An account with the specified account ID exists in the system.
- The account ID is derived using the account identifier type and account identifier combination when the account ID is not available in the pay instruction record.
- The account is eligible for reconciliation.

If the above mentioned validations are successful, the status of the pay instruction is set to **Pending**. However, if any of the above validation fails, the status of the pay instruction is set to **Error**.

This algorithm contains the following parameters:

- **Eligible for Reconciliation Characteristic Type** - Used to specify the characteristic type which indicates whether the account is eligible for reconciliation. This type of characteristic is defined on the account. You must specify a characteristic type where the characteristic entity is set to Account.
- **Maintenance Object for Generating Pay Instruction Logs** - Used to specify the maintenance object using which you want to generate logs for the pay instruction.
- **Pay Instruction Error Status** - Used to specify the status code to which you want to transition the pay instruction when the validation fails.
- **Pay Instruction Pending Status** - Used to specify the status code to which you want to transition the pay instruction when the validation is successful.

All these parameters are mandatory.

F1-TODOCOMPL

This algorithm completes the To Do entries that are linked to an object when the object exits the given status. It finds and completes all open To Do entries where the business object's primary key is defined as a drill key. However, if the **Exclude To Do Entries From Auto Completion** (**F1-EXLTD**) characteristic is set to **Y** for a To Do type, the system does not automatically complete the respective To Do entry.

This algorithm contains the following parameter:

- **'Do Not Complete To Do Type' Char Type** – Used to specify the characteristic type that indicates whether the To Do entries should be automatically completed or not.

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Note: The **F1-EXLTD** characteristic type is shipped with the product. You can either use the **F1-EXLTD** characteristic type or a custom characteristic type, if required. Note that you must specify a predefined characteristic type where the characteristic entity is set to **To Do Type** and the predefined values are set to **Y** or **N**.

C1-MRECONVAL

This algorithm is invoked when you submit the pay instruction file for reconciliation. It checks the following:

- The payment is not associated with any other reconciliation which is in the status other than **Pending Cancelation** or **Canceled**.
- The payment ID and payor account ID are both available for further processing.

It contains the following parameters:

- **Reconciliation Canceled Status** - Used to specify the status code to which the reconciliation in the **Pending Cancelation** status is transitioned when the **Reconciliation Cancelation Periodic Monitor (C1-RCNMD)** batch is executed.
- **Reconciliation Pending Cancelation Status** - Used to specify the status code to which the reconciliation is transitioned when you click the **Cancel** button.

Both these parameters are mandatory.

C1-MONPAYINS

This algorithm is invoked when the status of the reconciliation is changed to **Initial Reconciliation in Progress** or **Reconciliation in Progress**. It monitors or checks whether there are any pay instructions in the following statuses:

- Reconciliation Pending Processing
- Derivation Pending Processing
- Completed

If all pay instructions in the reconciliation are in the **Completed** status, then the status of the reconciliation is changed to Completed. However, if there are any pay instructions in the **Reconciliation Pending Processing** or **Derivation Pending Processing** status, then the status of reconciliation is changed to **Open**.

This algorithm contains the following parameters:

- **Pay Instruction Derivation Pending Processing Status** - Used to specify the status code to which the pending pay instruction is transitioned when the number of pay instructions in the reconciliation exceeds the deferred processing threshold (specified in an algorithm which is created using the **C1-RCOPNPYIN** algorithm type).
- **Pay Instruction Reconciliation Pending Processing Status** - Used to specify the status code to which the open pay instruction is transitioned when the number of pay instructions in the reconciliation exceeds the deferred processing threshold (specified in an algorithm which is created using the **C1-RCOPNPYIN** algorithm type).
- **Pay Instruction Completed Status** - Used to specify the status code to which the pay instruction is transitioned when it is fully reconciled.
- **Reconciliation Open Status** - Used to specify the status code to which you want to transition the reconciliation when there is a pay instruction in the status which is specified in the **Pay Instruction Derivation Pending Processing Status** or **Pay Instruction Reconciliation Pending Processing Status** parameter.
- **Reconciliation Completed Status** - Used to specify the status code to which you want to transition the reconciliation when all its pay instructions are in the status which is specified in the **Pay Instruction Completed Status** parameter.

All these parameters are mandatory.

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C1-TRNPAYRCN

This algorithm transfers the payment amount from the payor account's contract to the reconciliation contract of the accounts for which you have received the pay instruction. In this process, the payment against the payor account's contract is canceled and the payment against the payee account's reconciliation contract is created in the **Frozen** status.

It contains the following parameters:

- **Payment Cancel Reason** - Used to indicate the reason that you want to use when the payment on the payor account's contract is canceled.
- **Reconciliation Contract Match Type** - Used to specify the match type using which you want to apply payment against the reconciliation contract.

Both these parameters are mandatory.

C1-RCOPNPYIN

This algorithm checks whether the number of pay instructions in the reconciliation exceeds the limit defined in the **Deferred Processing Threshold** parameter. If the status of the pay instruction is **Pending** and the number of pay instructions in the reconciliation exceeds the limit defined in the **Deferred Processing Threshold** parameter, then the status of the pay instruction is changed to the value defined in the **Pay Instruction Derivation Pending Processing Status** parameter.

However, if the status of the pay instruction is **Open** and the number of pay instructions in the reconciliation exceeds the limit defined in the **Deferred Processing Threshold** parameter, then the status of the pay instruction is changed to the value defined in the **Pay Instruction Reconciliation Pending Processing Status** parameter.

It contains the following parameters:

- **Pay Instruction Pending Status** - Used to specify the status code to which a pay instruction is transitioned when its validation is successful.
- **Pay Instruction Open Status** - Used to specify the status code to which a pay instruction is transitioned when it is not fully reconciled.
- **Pay Instruction Derivation Pending Processing Status** - Used to specify the status code to which you want to transition the pending pay instruction when the number of pay instructions in the reconciliation exceeds the deferred processing threshold limit.
- **Pay Instruction Reconciliation Pending Processing Status** - Used to specify the status code to which you want to transition the open pay instruction when the number of pay instructions in the reconciliation exceeds the deferred processing threshold limit.
- **Deferred Processing Threshold** - Used to specify the maximum number of pay instructions that can be reconciled in the real time (i.e. immediately). If the number of pay instructions in the reconciliation exceeds the deferred processing threshold limit, the pay instruction is reconciled in the deferred mode.

All these parameters are mandatory.

C1-RCNOPNMR

This algorithm initiates the reconciliation process for the past open reconciliation records of the account. It contains the following parameters:

- **Reconciliation Open Status** - Used to specify the status code to which the reconciliation is transitioned when its pay instruction is not fully reconciled.
- **Reconciliation In Progress Status** - Used to specify the status code to which you want to transition the past open reconciliation record when the current reconciliation record of the account is reconciled.

Both these parameters are mandatory.

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C1-RCMONPNCN

This algorithm is invoked when the **Reconciliation Cancelation Periodic Monitor (C1-RCNMD)** batch is executed. It checks whether the reason is specified while canceling the reconciliation. If the cancel reason is specified, the status of the reconciliation is changed to **Canceled**. However, if the cancel reason is not specified, an error occurs while executing the **Reconciliation Cancelation Periodic Monitor (C1-RCNMD)** batch.

It contains the following parameters:

- **Reconciliation Cancel Status Reason** -

  Used to specify the cancel reason. If you specify the value for this parameter, the system will validate whether the cancel reason specified while canceling the reconciliation matches the cancel reason specified in this parameter. If the cancel reason does not match, an error occurs while executing the **Reconciliation Cancelation Periodic Monitor (C1-RCNMD)** batch. You must specify a reason which is defined for the **Pending Cancelation** status of the **C1-MemberReconciliation** business object.

C1-CANPAYINS

This algorithm is invoked when the **Reconciliation Cancelation Periodic Monitor (C1-RCNMD)** batch is executed. It changes the status of all pay instructions in the reconciliation.

It contains the following parameter:

- **Pay Instruction Canceled Status** - Used to specify the status code to which you want to transition a pay instruction when the reconciliation is canceled. This parameter is mandatory.

C1-CANRCNPAY

This algorithm transfers the payment amount from the payee account's reconciliation contract to the payor account's contract. In this process, the payment against the reconciliation contract is canceled and the payment against the payor account's contract is created in the **Frozen** status.

It contains the following parameters:

- **Payment Cancel Reason** - Used to indicate the reason that you want to use when the payment against the payee account's reconciliation contract is canceled.
- **On Account Match Type** - Used to specify the match type using which you want to apply the payment against the contract of the payor account.

Both these parameters are mandatory.

C1-RCNCANLTD

This algorithm is invoked when the status of the reconciliation is changed to **Canceled**. It creates a To Do using the specified To Do type and assigns it to users with the specified To Do role.

It contains the following parameters:

- **To Do Type** - Used to specify the type of notification that you want to generate when the reconciliation is canceled.
- **To Do Role** - Used to specify the To Do role to indicate the users to whom you want to send the notification when the reconciliation is canceled.

The rest of the parameters, such as **To Do Type Element Name**, **To Do Role Element Name**, **Message Category**, **Message Number**, **Characteristic Type For Log Entry**, **To Do Sort Keys Retriever Script**, **Discard Cancel Terminate Reason Element**, **Discard Cancel Terminate Reason**, **Retry Frequency**, and **Retry Frequency Element Name**, are not used at the moment.

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Algorithms Used in C1-PayInstruction

The following table lists the algorithms which are attached to the **C1-PayInstruction** business object:

System Event	Algorithm	Algorithm Type	Description
Information	C1-MPAYININF	C1-MPAYININF	Refer to C1-MPAYININF on page 2790

The following table lists the algorithms which are used in the lifecycle of the **C1-PayInstruction** business object:

Status	System Event	Algorithm	Algorithm Type	Description
Pending	Monitor	F1-AT-RQJ	F1-GEN-BOMNJ	Refer to F1-AT-RQJ on page 225
Derivation In Progress	Enter	C1-PYINDRVAN	C1-PYINDRVAN	Refer to C1-PYINDRVAN on page 2790
Reconciliation In Progress	Enter	C1-PIRECOCIL	C1-PIRECOCIL	Refer to C1-PIRECOCIL on page 2791
Open	-	-	-	-
Complete	-	-	-	-
Cancelled	Enter	C1-PYICNADJ	C1-PYICNADJ	Refer to C1-PYICNADJ on page 2792
Derivation Pending Processing	Monitor	F1-AT-RQJ	F1-GEN-BOMNJ	Refer to F1-AT-RQJ on page 225
Reconciliation Pending Processing	Monitor	F1-AT-RQJ	F1-GEN-BOMNJ	Refer to F1-AT-RQJ on page 225
Error	-	-	-	-

C1-MPAYININF

This algorithm generates the pay instruction information string which appears throughout the application. It concatenates the following fields separated by a comma in the specified order:

- "Period:" Start Date - End Date
- Pay Instruction Amount
- Pay Instruction Status
- Payor Name
- Pay Instruction ID

C1-PYINDRVAN

This algorithm is invoked when the status of the pay instruction is changed to **Derivation in Progress**. It derives the following:

- Policy using the policy number

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- Plan using the plan number
- Member using the member identifier type and member identifier
- Payee account using the account identifier type and account identifier

If the policy, plan, and member information is available, it validates whether the member is covered under the specified plan of the policy. However, if the policy and plan information is available, it validates whether the plan is included in the specified policy. If the derivation and validation process is successful, the related object information is derived for policy, plan, and/or member from the system.

However, if the derivation and validation process fails, the related object information is not derived for policy, plan, and/or member and the status of the pay instruction remains as **Pending**.

In addition, the system determines whether the pay instruction must be reconciled at the member, plan, or policy level depending on the information available in the pay instruction. If the policy, plan, and member information is available, the pay instruction is reconciled at the member level. If the policy and plan information is available, the pay instruction is reconciled at the policy plan level. However, if the policy information is available, the pay instruction is reconciled at the policy level.

It contains the following parameters:

- **Unsuccessful Processing Status** - Used to specify the status code to which you want to transition the pay instruction when the derivation and validation process fails.
- **Pay Instruction Matching Level Characteristic Type** - Used to specify the characteristic type which indicates whether the pay instruction must be reconciled at the member, plan, or policy level. This type of characteristic is defined on the pay instruction. Here, you must specify a characteristic type where the characteristic entity is set to **Payment Instruction**.
- **Member Matching Level Characteristic Value** - Used to specify the value that you want to define for the characteristic type specified in the **Pay Instruction Matching Level Characteristic Type** parameter when the pay instruction must be reconciled at the member level.
- **Plan Matching Level Characteristic Value** - Used to specify the value that you want to define for the characteristic type specified in the **Pay Instruction Matching Level Characteristic Type** parameter when the pay instruction must be reconciled at the policy plan level.
- **Policy Matching Level Characteristic Value** - Used to specify the value that you want to define for the characteristic type specified in the **Pay Instruction Matching Level Characteristic Type** parameter when the pay instruction must be reconciled at the policy level.

All these parameters are mandatory.

C1-PIRECOCIL

This algorithm is invoked when the status of the pay instruction is changed to **Reconciliation in Progress**. It searches whether there is an open bill segment with the policy, plan, member, and coverage period combination for the payee account. If such bill segment exists in the system, this algorithm reconciles the pay instruction against the open bill segment. It creates two reconciliation adjustments - one against the payee account's reconciliation contract and another against the bill segment's contract.

If the amount on the pay instruction is fully reconciled, then the status of the pay instruction is changed to **Completed**. However, if the amount on the pay instruction is not fully reconciled, then the status of the pay instruction is changed to **Open**.

It contains the following parameters:

- **Payment Instruction Match Level Char Type** - Used to specify the characteristic type which indicates whether the pay instruction must be reconciled at the member, plan, or policy level. This type of characteristic is defined on the pay instruction. Here, you must specify a characteristic type where the characteristic entity is set to **Payment Instruction**.
- **Subscriber Match Level Char Value** - Used to specify the value of the characteristic type specified in the **Payment Instruction Match Level Char Type** parameter which indicates that the pay instruction must be reconciled at the member level.

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- **Policy Plan Match Level Char Value** - Used to specify the value of the characteristic type specified in the **Payment Instruction Match Level Char Type** parameter which indicates that the pay instruction must be reconciled at the policy plan level.
- **Policy Match Level Char Value** - Used to specify the value of the characteristic type specified in the **Payment Instruction Match Level Char Type** parameter which indicates that the pay instruction must be reconciled at the policy level.
- **Billed Transfer Recon Adjustment Type** - Used to specify the adjustment type using which you want to create the adjustment on the bill segment's contract when the pay instruction is reconciled.
- **Payment Instruction Recon Adjustment Type** - Used to specify the adjustment type using which you want to create the adjustment on the reconciliation contract when the pay instruction is reconciled.
- **Recon Open Status** - Used to specify the status code to which you want to transition the reconciliation when the status of the pay instruction is changed to **Open**.
- **Payment Instruction Open Status** - Used to specify the status code to which you want to transition the pay instruction when it is not fully reconciled.
- **Payment Instruction Complete Status** - Used to specify the status code to which you want to transition the pay instruction when it is fully reconciled.
- **Reconciliation Char Type** - Used to specify the characteristic type which you want to use to store the reconciliation ID. This type of characteristic is defined on the adjustments which are created on reconciliation. Here, you must specify a characteristic type where the characteristic entity is set to **Adjustment Type**.
- **Payment Event Characteristic Type** - Used to specify the characteristic type which you want to use to store the payment event ID. This type of characteristic is defined on the reconciliation adjustments to indicate the payment event whose payment is distributed against the bill segment.
- **Reconciliation Adjustment Type for Offsetting Debits using Billed Credits** - Used to specify the adjustment type using which you want to create the adjustments when offsetting billed debit verses billed credits.

All these parameters are mandatory.

C1-PYICNADJ

This algorithm is invoked when the status of the pay instruction is changed to **Canceled**. It cancels the reconciliation adjustments which are created while reconciling the pay instruction. It cancels the reconciliation adjustment irrespective of whether the status of the pay instruction is **Open** or **Completed**.

It contains the following parameters:

- **Adjustment Cancel Reason** - Used to indicate the reason that you want to use when the reconciliation adjustments are canceled.
- **Pay Instruction Completed Status** - Used to specify the status code to which the pay instruction is transitioned when it is fully reconciled.
- **Pay Instruction Open Status** - Used to specify the status code to which the pay instruction is transitioned when it is not fully reconciled.
- **Reconciliation Completed Status** - Used to specify the status code to which the reconciliation is transitioned when all its pay instructions are fully reconciled.
- **Reconciliation Open Status** - Used to specify the status code to which the reconciliation is transitioned when its pay instruction is not fully reconciled.

All these parameters are mandatory.

F1-AT-RQJ

This algorithm transitions the current status of the business object to the specified status. It contains the following parameters:

- **Next Status** – Used when you want to override the default next status specified in the lifecycle.

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- **Next Transition Condition** – Used when you want to override the default next transition condition specified in the lifecycle.

At a time, you can specify value for either the **Next Status** or **Next Transition Condition** parameter. If you don't specify any value for these parameters, the system will transition the business object to the default next status specified in its lifecycle.

Algorithms Used in C1-MemberDiscReportType

The following table lists the algorithms which are attached to the **C1-MemberDiscReportType** business object:

System Event	Algorithm	Algorithm Type	Description
Pre-Processing	C1-DISCPEP	C1-DISCPEP	Refer to C1-DISCPEP on page 2793

C1-DISCPEP

This algorithm validates a discrepancy report type. It checks the following:

- A duplicate characteristic type is not added.

In addition, it does not allow you to:

- Delete a discrepancy report type when the corresponding discrepancy report is in a status other than **Completed**.

Algorithms Used in C1-DiscrepancyReport

The following table lists the algorithms which are used in the lifecycle of the **C1-DiscrepancyReport** business object:

The following table lists the algorithms which are used in the lifecycle of the **C1-DiscrepancyReport** business object:

Status	System Event	Algorithm	Algorithm Type	Description
Draft	Enter	C1-VALNEWDIS	C1-VALNEWDIS	Refer to C1-VALNEWDIS on page 2794
	Enter	C1-DISCDEF	C1-DISCDEF	Refer to C1-DISCDEF on page 2794
Deferred Processing	Monitor	F1-AT-RQJ	F1-GEN-BOMNJ	Refer to F1-AT-RQJ on page 225
Pending	Enter	C1-CRDSLNITM	C1-CRDSLNITM	Refer to C1-CRDSLNITM on page 2794
	Exit	F1-TODOCOMPL	F1-TODOCOMPL	Refer to F1-TODOCOMPL on page 1469
Completed	Enter	C1-VALCMPDIS	C1-VALCMPDIS	Refer to C1-VALCMPDIS on page 2795

F1-AT-RQJ

This algorithm transitions the current status of the business object to the specified status. It contains the following parameters:

- **Next Status** – Used when you want to override the default next status specified in the lifecycle.

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- **Next Transition Condition** – Used when you want to override the default next transition condition specified in the lifecycle.

At a time, you can specify value for either the **Next Status** or **Next Transition Condition** parameter. If you don't specify any value for these parameters, the system will transition the business object to the default next status specified in its lifecycle.

C1-DISRINFO

This algorithm generates the discrepancy report information string which appears throughout the application. It concatenates the following fields separated by a comma in the specified order:

- Discrepancy Report Type Description
- Discrepancy Report Status
- Discrepancy Report ID

C1-DISCDEF

This algorithm checks whether the number of pay instructions in the non-final status exceeds the deferred count specified in the algorithm. If the total number of pay instructions exceed the defer processing count, the status of the discrepancy report is set to **Deferred Processing** else the status of the discrepancy report is set to **Pending**.

It contains the following parameters:

- **Deferred Count** - Used to specify the count which helps to determine whether the pay instructions must be processed in the deferred mode (i.e. in the background) or in real time (i.e. immediately).

  Note: If the defer processing count is not provided, the system sets the default value to 1000.

- **Reconciliation Open Status** - Used to specify the status code to which you want to transition the reconciliation when its corresponding pay instruction is either in the **Deferred Processing** or **Pending** status.

C1-VALNEWDIS

This algorithm allows you to create a discrepancy report when the following conditions are met:

- The account for which discrepancy report is created is eligible for reconciliation.
- A discrepancy report in the **Pending** status does not exist for the account or file.
- A reconciliation record in the **Open** status exists for the account or file.

It contains the following parameters:

- **Eligible for Reconciliation Characteristic Type** - Used to specify the characteristic type which indicates whether the account is eligible for reconciliation. Here, you must specify a characteristic type where the characteristic entity is set to **Account**.
- **Eligible for Reconciliation Characteristic Value** - Used to specify the value of the characteristic type specified in the **Eligible for Reconciliation Characteristic Type** parameter which indicates that the account is eligible for reconciliation.

Both these parameters are mandatory.

C1-CRDSLNITM

This algorithm is invoked when the status of the discrepancy report is changed to **Pending**. If the discrepancy report is created at the account level, this algorithm creates a discrepancy line item for each policy, plan, member, and coverage

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period combination for which there is an open bill segment for the account and for which there are open and pending pay instructions in the open reconciliation.

However, if the discrepancy report is created at the file level, this algorithm creates a discrepancy line item for each policy, plan, member, and coverage period combination for which there are open and pending pay instructions in the open reconciliation. Note that the discrepancy line items are created for each account whose pay instructions are received in the pay instruction file.

It contains the following parameters:

- **Consumer Status Characteristic Type** - Used to specify the characteristic type which stores the consumer status of the member. The system retrieves the consumer status of the member and stores it against the respective discrepancy line item. Here, you must specify a characteristic type where the characteristic entity is set to **Person**. This parameter is mandatory.

F1-TODOCOMPL

This algorithm completes the To Do entries that are linked to an object when the object exits the given status. It finds and completes all open To Do entries where the business object's primary key is defined as a drill key. However, if the **Exclude To Do Entries From Auto Completion** (**F1-EXLTD**) characteristic is set to **Y** for a To Do type, the system does not automatically complete the respective To Do entry.

This algorithm contains the following parameter:

- **'Do Not Complete To Do Type' Char Type** – Used to specify the characteristic type that indicates whether the To Do entries should be automatically completed or not.

> **Note:** The **F1-EXLTD** characteristic type is shipped with the product. You can either use the **F1-EXLTD** characteristic type or a custom characteristic type, if required. Note that you must specify a predefined characteristic type where the characteristic entity is set to **To Do Type** and the predefined values are set to **Y** or **N**.

C1-VALCMPDIS

This algorithm is invoked when you click the **Finalize** button. It changes the status of the discrepancy report to **Completed** when the discrepancy category is specified for each discrepancy line item in the report.

Reconciliation Type

Oracle Revenue Management and Billing allows you to define a reconciliation type using which you can create the reconciliation. It is the reconciliation type which helps the system to determine the following:

- The business object using which the reconciliation should be created.
- The file format through which the pay instruction records can be uploaded in the system.

In addition, a reconciliation type indicates the algorithm which validates the pay instruction file and creates a pay instruction for each record in the file. Two algorithm types named **C1-PAYINSUPL** and **C1-RECONPROC** are shipped with the product. You need to maintain separate reconciliation types for different file formats. If you want to use a reconciliation type while uploading a pay instruction file in the CSV format, you need to create an algorithm using the **C1-PAYINSUPL** algorithm type and attach it to the reconciliation type. However, if you want to use a reconciliation type while uploading a pay instruction file in the EDI 820 format, you need to create an algorithm using the **C1-RECONPROC** algorithm type and attach it to the reconciliation type.

The **Reconciliation Type** screen allows you to define, edit, copy, and delete a reconciliation type. It contains the following zones:

- Reconciliation Type List on page 2796
- Reconciliation Type on page 2796

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Reconciliation Type List

The **Reconciliation Type List** zone lists the reconciliation types that are already defined in the system. It contains the following columns:

Column Name	Column Description
Reconciliation Type	Displays the reconciliation type.
Description	Displays the description of the reconciliation type.
Edit	On clicking the **Edit** (✎) icon, the **Reconciliation Type** screen appears where you can edit the details of the reconciliation type.
Reconciliation Category	Indicates the category to which the reconciliation belongs. The valid values are: • Group • Individual
Duplicate	On clicking the **Duplicate** (⧉) icon, the **Reconciliation Type** screen appears where you can define a new reconciliation type using an existing reconciliation type.
Delete	On clicking the **Delete** (🗑) icon, you can delete the reconciliation type.
	Note: You can delete a reconciliation type only when a reconciliation is not yet created using the reconciliation type.

On clicking the **Broadcast** (📡) icon corresponding to a reconciliation type, the **Reconciliation Type** zone appears with the details of the respective reconciliation type.

Related Topics

For more information on...	See...
How to edit a reconciliation type	Editing a Reconciliation Type on page 2802
How to delete a reconciliation type	Deleting a Reconciliation Type on page 2804
How to copy a reconciliation type	Copying a Reconciliation Type on page 2805
How to view the details of a reconciliation type	Viewing the Reconciliation Type Details on page 2806

Reconciliation Type

The **Reconciliation Type** zone displays the details of the reconciliation type. It contains the following sections:

- **Main** - Displays basic information about the reconciliation type. It contains the following fields:

Field Name	Field Description
Reconciliation Type	Displays the reconciliation type.
Reconciliation Business Object	Indicates the business object using which the reconciliation is created. In addition, a context menu (⌄) icon appears corresponding to this field which helps in navigating to other screens in the application.

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Field Name	Field Description
	Note: It has a link. On clicking the link, the **Business Object** screen appears where you can view the details of the respective business object.
Description	Displays the description of the reconciliation type.
Detailed Description	Displays additional information about the reconciliation type.
Reconciliation Category	Used to indicate the category to which the reconciliation belongs. The valid values are: • Group • Individual
	Note: The list includes only those values which are defined in the **RECON_CAT_FLG** lookup field.
Status	Indicates the status of the reconciliation type. The valid values are: • Active • Inactive

- **Algorithms** - Lists the algorithms which are associated with the reconciliation type. It contains the following columns:

Column Name	Column Description
Sequence	Indicates the order in which the algorithm with the same system event should be executed.
System Event	Indicates the system event when the algorithm should be executed. The valid value is: • Upload Pay Instructions
Algorithm	Indicates the algorithm attached to the system event.
	Note: It has a link. On clicking the link, the **Algorithm** screen appears where you can view the details of the respective algorithm.

- **Characteristics** - Lists the characteristics defined for the reconciliation type. It contains the following columns:

Column Name	Column Description
Characteristic Type	Indicates the characteristic type.
	Note: It has a link. On clicking the link, the **Characteristic Type** screen appears where you can view the details of the respective characteristic type.
Characteristic Value	Displays the value of the characteristic type.
Description	Displays the description of the characteristic value.
	Note: The data appears in this column when the type of characteristic value is set to **Predefined Value** or **Foreign Key Value**.

- **Record Actions** - Enables you to perform various actions on the reconciliation type. It contains the following buttons:

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Button Name	Button Description
Edit	Used to edit the details of the reconciliation type.
Delete	Used to delete the reconciliation type.
	Note: You can delete a reconciliation type only when a reconciliation is not yet created using the reconciliation type.
Duplicate	Used to create a new reconciliation type using an existing reconciliation type.

- **Record Information** - This section contains the following field:

Field Name	Field Description
Business Object	Indicates the business object using which the reconciliation type is created. In addition, a context menu (⊙) icon appears corresponding to this field which helps in navigating to other screens in the application.
	Note: It has a link. On clicking the link, the **Business Object** screen appears where you can view the details of the respective business object.

By default, the **Reconciliation Type** zone does not appear in the **Reconciliation Type** screen. It appears when you click the **Broadcast** (📡) icon corresponding to a reconciliation type in the **Reconciliation Type List** zone.

Related Topics

For more information on...	See...
How to edit a reconciliation type	Editing a Reconciliation Type on page 2802
How to delete a reconciliation type	Deleting a Reconciliation Type on page 2804
How to copy a reconciliation type	Copying a Reconciliation Type on page 2805
How to view the details of a reconciliation type	Viewing the Reconciliation Type Details on page 2806
How to define a reconciliation type	Defining a Reconciliation Type on page 2798
Reconciliation Type screen	Reconciliation Type on page 2795
Reconciliation Type zone	Reconciliation Type on page 2796

Defining a Reconciliation Type

Prerequisites

To define a reconciliation type, you should have:

- Reconciliation type and reconciliation business objects defined in the application
- Field mapping and reconciliation category defined in the application.

Procedure

To define a reconciliation type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **R** and then click **Reconciliation Type**.
   A sub-menu appears.

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3. Click the **Add** option from the **Reconciliation Type** sub-menu.

   The **Select Business Object** screen appears. It contains the following field:

Field Name	Field Description	Mandatory (Yes or No)
Reconciliation Type Business Object	Used to indicate the business object using which you want to create the reconciliation type. The valid value is: • Claims Reconciliation Type • Member Reconciliation Type **Note:** The above business object is shipped with the product. The list includes those business objects which are created using the **Reconciliation Type** (i.e., **C1-RECONTY**) maintenance object.	Yes

Tip: Alternatively, you can access **Select Business Object** screen by clicking the **Add** button in the **Page Title** area of the **Reconciliation Type** screen.

Note: The **Select Business Object** screen appears when there are multiple reconciliation type business objects defined in the application. If there is only one reconciliation type business object defined in the application, the **Reconciliation Type** screen appears.

4. Select the required reconciliation type business object from the respective field.
5. Click **OK**.

   The **Reconciliation Type** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details about the reconciliation type.
   - **Algorithms** - Used to associate algorithms with the reconciliation type.
   - **Characteristics** - Used to define the characteristics for the reconciliation type.

   The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Reconciliation Type	Used to specify the reconciliation type.	Yes
Business Object	Indicates the reconciliation type business object using which you are defining the reconciliation type.	Not applicable
Reconciliation Business Object	Used to indicate the business object using which you want to create the reconciliation. The valid value is: • Member Reconciliation **Note:** The above business object is shipped with the product. The list includes those business objects which are created using the **Reconciliation** (i.e., **C1-RECON**) maintenance object.	Yes
Description	Used to specify the description for the reconciliation type.	Yes
Detailed Description	Used to specify additional information about the reconciliation type.	No
Reconciliation Category	Used to indicate the category to which the reconciliation belongs. The valid values are:	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	• Group • Individual **Note:** The list includes only those values which are defined in the **RECON_CAT_FLG** lookup field.	
Status	Used to indicate the status of the reconciliation type. The valid values are: • Active • Inactive	Yes

6. Enter the required details in the **Main** section.
7. Associate algorithms with the reconciliation type, if required.
8. Define characteristics for the reconciliation type, if required.
9. Click **Save**.
   The reconciliation type is defined.

Related Topics

For more information on...	See...
Reconciliation Type screen	Reconciliation Type on page 2795
How to associate an algorithm with a reconciliation type	Associating an Algorithm with a Reconciliation Type on page 2801
How to define a characteristic for a reconciliation type	Defining a Characteristic for a Reconciliation Type on page 2800

Defining a Characteristic for a Reconciliation Type

Prerequisites

To define a characteristic for a reconciliation type, you should have:

- Characteristic types defined in the application (where the characteristic entity is set to **Reconciliation Type**).

Procedure

To define a characteristic for a reconciliation type:

1. Ensure that the **Characteristics** section is expanded when you are defining, editing, or copying a reconciliation type.

   The **Characteristics** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Characteristic Type	Used to indicate the characteristic type. **Note:** The list includes only those characteristic types where the characteristic entity is set to **Reconciliation Type**.	Yes (Conditional) **Note:** This field is required when you are defining a characteristic for the reconciliation type.
Characteristic Value	Used to specify the value for the characteristic type.	Yes (Conditional)

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Field Name	Field Description	Mandatory (Yes or No)
	Note: If you select a predefined characteristic type, the **Search** (🔍) icon appears corresponding to the **Characteristic Value** field. On clicking the **Search** icon, the **Predefined Characteristic Search** window appears. On specifying the value for a predefined characteristic type, the description of the characteristic value appears corresponding to the **Characteristic Value** field.	**Note:** This field is required when you are defining a characteristic for the reconciliation type.

2. Enter the required details in the **Characteristics** section.
3. If you want to define more than one characteristic for the reconciliation type, click the **Add** (+) icon and then repeat step 2.

Note: However, if you want to remove a characteristic from the reconciliation type, click the **Delete** (🗑) icon corresponding to the characteristic.

Related Topics

For more information on...	See...
How to define a reconciliation type	Defining a Reconciliation Type on page 2798
How to edit a reconciliation type	Editing a Reconciliation Type on page 2802
How to copy a reconciliation type	Copying a Reconciliation Type on page 2805

Associating an Algorithm with a Reconciliation Type

You can upload a pay instruction file in the CSV and EDI 820 file formats. While uploading a pay instruction file, you need to specify the reconciliation type using which you want to create the reconciliation. A reconciliation type indicates the algorithm which validates the pay instruction file and creates a pay instruction for each record in the file. Two algorithm types named **C1-PAYINSUPL** and **C1-RECONPROC** are shipped with the product. You need to maintain separate reconciliation types for different file formats. If you want to use a reconciliation type while uploading a pay instruction file in the CSV format, you need to create an algorithm using the **C1-PAYINSUPL** algorithm type and attach it to the reconciliation type. However, if you want to use a reconciliation type while uploading a pay instruction file in the EDI 820 format, you need to create an algorithm using the **C1-RECONPROC** algorithm type and attach it to the reconciliation type.

Prerequisites

To associate an algorithm with a reconciliation type, you should have:

- Algorithm defined using the **C1-PAYINSUPL** or **C1-RECONPROC** algorithm type depending on whether you want to use the reconciliation type while uploading a pay instruction file in the CSV or EDI 820 file format
- System event defined in the application.

Procedure

To associate an algorithm with a reconciliation type:

1. Ensure that the **Algorithms** section is expanded when you are defining, editing, or copying a *r*econciliation type.

   The **Algorithms** section contains the following fields:

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Field Name	Field Description	Mandatory (Yes or No)
Sequence	Used to indicate the order in which the algorithms for each system event should be executed.	Yes (Conditional) **Note:** This field is required when you are associating an algorithm with the reconciliation type.
System Event	Used to indicate the system event on which the algorithm should be executed. The valid value is: • **Upload Pay Instructions** - Used when you want to execute the attached algorithm while uploading a pay instruction file using the **Pay Instruction CSV File Upload (C1-RECUP)** or **Upload Lockbox Payment and Pay Instruction Files (C1-PUPSG)** batch.	Yes (Conditional) **Note:** This field is required when you are associating an algorithm with the reconciliation type.
Algorithm	Used to indicate the algorithm that you want to attach to the system event. **Note:** The **Search** (🔍) icon appears corresponding to this field. On clicking the **Search** icon, the **Algorithm Search** window appears. On specifying the value for a algorithm, the description of the algorithm appears corresponding to the **Algorithm** field.	Yes (Conditional) **Note:** This field is required when you are associating an algorithm with the reconciliation type.

2. Enter the required details in the **Algorithms** section.
3. If you want to associate more than one algorithm with the reconciliation type, click the **Add** (+) icon and *t*hen repeat step *2*.

Note: However, if you want to remove an algorithm from the reconciliation type, click the **Delete** (🗑) icon corresponding to the algorithm.

4. Click **Save**.
   The algorithms are associated with the reconciliation type.

Related Topics

For more information on...	See...
How to define a reconciliation type	Defining a Reconciliation Type on page 2798
How to edit a reconciliation type	Editing a Reconciliation Type on page 2802
How to copy a reconciliation type	Copying a Reconciliation Type on page 2805

Editing a Reconciliation Type

Prerequisites

To edit a reconciliation type, you should have:

- Reconciliation type and reconciliation business objects defined in the application
- Field mapping and reconciliation category defined in the application

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Procedure

To edit a reconciliation type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **R** and then click **Reconciliation Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Reconciliation Type** sub-menu.
   The **Reconciliation Type** screen appears.
4. In the **Reconciliation Type List** zone, click the **Edit** (✎) icon in the **Edit** column corresponding to the *r*econciliation type whose details you want to edit.

   The **Reconciliation Type** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details about the reconciliation type.
   - **Algorithms** - Used to associate algorithms with the reconciliation type.
   - **Characteristics** - Used to define the characteristics for the reconciliation type.

   The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Reconciliation Type	Displays the reconciliation type.	Not applicable
Business Object	Indicates the reconciliation type business object using which you are defining the reconciliation type.	Not applicable
Reconciliation Business Object	Used to indicate the business object using which you want to create the reconciliation. The valid value is: • Member Reconciliation **Note:** The above business object is shipped with the product. The list includes those business objects which are created using the **Reconciliation** (i.e., **C1-RECON**) maintenance object.	Yes
Description	Used to specify the description for the reconciliation type.	Yes
Detailed Description	Used to specify additional information about the reconciliation type.	No
Reconciliation Category	Used to indicate the category to which the reconciliation belongs. The valid values are: • Group • Individual **Note:** The list includes only those values which are defined in the **RECON_CAT_FLG** lookup field.	Yes
Status	Used to indicate the status of the reconciliation type. The valid values are: • Active • Inactive	Yes

Tip: Alternatively, you can click the **Edit** button in the **Reconciliation Type** zone to edit the details of the reconciliation type.

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5. Modify the required details in the **Main** section.
6. Associate or remove an algorithm from the reconciliation type, if required.
7. Define, edit, or remove characteristics of the reconciliation type, if required.
8. Click **Save**.
   The changes made to the reconciliation type are saved.

Related Topics

For more information on...	See...
Reconciliation Type screen	Reconciliation Type on page 2795
Reconciliation Type List zone	Reconciliation Type List on page 2796
Reconciliation Type zone	Reconciliation Type on page 2796
How to associate an algorithm with a reconciliation type	Associating an Algorithm with a Reconciliation Type on page 2801
How to define a characteristic for a reconciliation type	Defining a Characteristic for a Reconciliation Type on page 2800

Deleting a Reconciliation Type

Procedure

To delete a reconciliation type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **R** and then click **Reconciliation Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Reconciliation Type** sub-menu.
   The **Reconciliation Type** screen appears.
4. In the **Reconciliation Type List** zone, click the **Delete** (🗑) icon in the **Delete** column corresponding to the *r*econciliation type that you want to delete.
   A message appears confirming whether you want to delete the reconciliation type.

   Note: You can delete a reconciliation type only when a reconciliation is not yet created using the reconciliation type.

   Tip: Alternatively, you can click the **Delete** button in the **Reconciliation Type** zone to delete the reconciliation type.
5. Click **OK**.
   The reconciliation type is deleted.

Related Topics

For more information on...	See...
Reconciliation Type screen	Reconciliation Type on page 2795
Reconciliation Type List zone	Reconciliation Type List on page 2796
Reconciliation Type zone	Reconciliation Type on page 2796

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Copying a Reconciliation Type

Instead of creating a reconciliation type from scratch, you can create a new reconciliation type using an existing reconciliation type. This is possible through copying a reconciliation type. On copying a reconciliation type, the details including the algorithms and characteristics are copied to the new reconciliation type. You can then edit the details, if required.

Prerequisites

To copy a reconciliation type, you should have:

- Reconciliation type (whose copy you want to create) defined in the application
- Reconciliation business objects defined in the application
- Field mapping and reconciliation category defined in the application.

Procedure

To copy a reconciliation type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **R** and then click **Reconciliation Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Reconciliation Type** sub-menu.
   The **Reconciliation Type** screen appears.
4. In the **Reconciliation Type List** zone, click the **Duplicate** (⎘) icon in the **Duplicate** column *c*orresponding to the reconciliation type whose copy you want to create.

   The **Reconciliation Type** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details about the reconciliation type.
   - **Algorithms** - Used to associate algorithms with the reconciliation type.
   - **Characteristics** - Used to define the characteristics for the reconciliation type.

   The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Reconciliation Type	Used to specify the reconciliation type.	Yes
Business Object	Indicates the business object using which you are defining the reconciliation type.	Not applicable
Reconciliation Business Object	Used to indicate the business object using which you want to create the reconciliation. The valid value is: • Member Reconciliation **Note:** The above business object is shipped with the product. The list includes those business objects which are created using the **Reconciliation** (i.e., **C1-RECON**) maintenance object.	Yes
Description	Used to specify the description for the reconciliation type.	Yes
Detailed Description	Used to specify additional information about the reconciliation type.	No
Reconciliation Category	Used to indicate the category to which the reconciliation belongs. The valid values are:	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	• Group • Individual **Note:** The list includes only those values which are defined in the **RECON_CAT_FLG** lookup field.	
Status	Used to indicate the status of the reconciliation type. The valid values are: • Active • Inactive	Yes

Tip: Alternatively, you can click the **Duplicate** button in the **Reconciliation Type** zone to create a copy of the reconciliation type.

5. Enter the required details in the **Main** section.
6. Associate or remove an algorithm from the reconciliation type, if required.
7. Define, edit, or remove characteristics of the reconciliation type, if required.
8. Click **Save**.
   The new reconciliation type is defined.

Related Topics

For more information on...	See...
Reconciliation Type screen	Reconciliation Type on page 2795
Reconciliation Type List zone	Reconciliation Type List on page 2796
Reconciliation Type zone	Reconciliation Type on page 2796
How to associate an algorithm with a reconciliation type	Associating an Algorithm with a Reconciliation Type on page 2801
How to define a characteristic for a reconciliation type	Defining a Characteristic for a Reconciliation Type on page 2800

Viewing the Reconciliation Type Details

Procedure

To view the details of a reconciliation type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **R** and then click **Reconciliation Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Reconciliation Type** sub-menu.
   The **Reconciliation Type** screen appears.
4. In the **Reconciliation Type List** zone, click the **Broadcast** (📡) icon corresponding to the reconciliation type whose details you want to view.
   The **Reconciliation Type** zone appears.
5. View the details of the reconciliation type in the **Reconciliation Type** zone.

Related Topics

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For more information on...	See...
Reconciliation Type screen	Reconciliation Type on page 2795
Reconciliation Type List zone	Reconciliation Type List on page 2796
Reconciliation Type zone	Reconciliation Type on page 2796

Reconciliation (Used for Searching)

The **Reconciliation** screen allows you to search for a reconciliation using various search criteria. It contains the following zone:

- Search Reconciliation on page 2807

Through this screen, you can navigate to the following screen:

- Reconciliation (Used for Viewing) on page 2812

Search Reconciliation

The **Search Reconciliation** zone allows you to search for a reconciliation using various search criteria. This zone contains the following sections:

- **Search Criteria** - The **Search Criteria** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Search By	Used to indicate whether you want to search for a reconciliation using the reconciliation, account, or payment tender details. The valid values are: • Reconciliation Details • Account Details • Payment Tender Details **Note:** By default, the **Reconciliation Details** option is selected.	Yes
Reconciliation ID	Used to search for a particular reconciliation. **Note:** This field appears when the **Reconciliation Details** option is selected from the **Search By** list.	No
Reconciliation Type	Used to search for reconciliations which are created using a particular reconciliation type. **Note:** This field appears when the **Reconciliation Details** option is selected from the **Search By** list. The list includes only those reconciliation types which are already defined in the system.	No
Created From	Used to search reconciliations which are created from a particular date onwards.	No

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Field Name	Field Description	Mandatory (Yes or No)
	Note: This field appears when the **Reconciliation Details** option is selected from the **Search By** list. You can either manually specify the date or select it using the **Date Picker** () icon corresponding to the field.	
Status	Used to search for reconciliations with a particular status. The valid values are: • Canceled • Completed • Draft • Initial Reconciliation in Progress • Open • Pending Cancelation • Pending • Pending Reconciliation • Reconciliation in Progress • Void **Note:** This field appears when the **Reconciliation Details** option is selected from the **Search By** list.	No
Created Until	Used to search for reconciliations which are created till a particular date. **Note:** This field appears when the **Reconciliation Details** option is selected from the **Search By** list. You can either manually specify the date or select it using the **Date Picker** () icon corresponding to the field.	No
File Name	Used to search for a reconciliation which is created for a particular pay instruction file. **Note:** This field appears when the **Reconciliation Details** option is selected from the **Search By** list.	No
Person Name	Used to search for reconciliations which contain a particular member's pay instructions. **Note:** This field appears when the **Account Details** option is selected from the **Search By** list.	No
Account Identifier Type	Used to select the identifier type based on which you want to search reconciliations which contain pay instructions for a particular payee account.	Yes (Conditional)

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Field Name	Field Description	Mandatory (Yes or No)
	Note: This field appears when the **Account Details** option is selected from the **Search By** list. The list includes only those account identifier types which are already defined in the system.	**Note:** If you specify the account identifier as a search criteria, you have to select the account identifier type.
Account ID	Used to search for reconciliations which contain pay instructions for a particular payee account.	No
	Note: This field appears when the **Account Details** option is selected from the **Search By** list. The **Search** (🔍) icon appears corresponding to the **Account ID** field. On clicking the **Search** icon, the **Account Search** window appears.	
Account Identifier	Used to specify the value for the account identifier type.	Yes (Conditional)
	Note: This field appears when the **Account Details** option is selected from the **Search By** list.	**Note:** If you specify the account identifier type as a search criteria, you have to specify the account identifier.
Check Number	Used to search a reconciliation associated with a payment tender which is received through a particular check.	No
	Note: This field appears when the **Payment Tender Details** option is selected from the **Search By** list.	
Payor Account ID	Used to search reconciliations which are associated with a particular payor account.	No
	Note: This field appears when the **Payment Tender Details** option is selected from the **Search By** list. The **Search** (🔍) icon appears corresponding to the **Payor Account ID** field. On clicking the **Search** icon, the **Account Search** window appears.	
MICR ID	Used to search a reconciliation associated with a payment tender which contains a particular MICR code.	No
	Note: This field appears when the **Payment Tender Details** option is selected from the **Search By** list.	
Tender Amount	Used to search reconciliations associated with payment tenders with a particular amount.	No
	Note: This field appears when the **Payment Tender Details** option is selected from the **Search By** list.	

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Note: You must specify at least one search criterion while searching for a reconciliation.

- **Search Results** - On clicking the **Search** button, the search results appear based on the specified search criteria. The **Search Results** section contains the following columns:

Column Name	Column Description
Creation Date/ Time	Displays the date and time when the reconciliation is created.
Reconciliation Information	Displays information about the reconciliation. **Note:** It has a link. On clicking the link, the **Reconciliation** screen appears where you can view the details of the respective reconciliation.
Status	Indicates the status of the reconciliation. The valid values are: • Canceled • Completed • Draft • Initial Reconciliation in Progress • Open • Pending Cancelation • Pending • Pending Reconciliation • Reconciliation in Progress • Void
Payor Account ID	Indicates the payor account to which the reconciliation is associated. **Note:** It has a link. On clicking the link, the **Account** screen appears where you can view the details of the respective payor account.
Payment ID	Indicates the payment to which the reconciliation is associated. **Note:** It has a link. On clicking the link, the **Payment** screen appears where you can view the details of the respective payment.
File Name	Indicates the pay instruction file for which the reconciliation is created in the system.
Duplicate	Used to create a new reconciliation using an existing reconciliation. **Note:** The **Duplicate** button appears when the reconciliation is in the **Canceled** status.

Note: Pagination is used to display limited number of records in the **Search Results** section. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

Related Topics

For more information on...	See...
How to search for a reconciliation	Searching for a Reconciliation on page 2811
How to view the details of a reconciliation	Viewing the Reconciliation Details on page 2811

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Searching for a Reconciliation

Prerequisite

To search for a reconciliation, you should have:

- Reconciliation types and account identifier types defined in the application.

Procedure

To search for a reconciliation:

1. Click the **Menu** link in the **Application** toolbar.
   A list appears.
2. From the **Main** menu, select **Accounting and Receivable** and then click **Reconciliation**.
   The **Reconciliation** screen appears.
3. Enter the search criteria in the **Search Reconciliation** zone.

> **Note:** ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.

4. Click **Search**.
   A list of reconciliations that meet the search criteria appears in the **Search Results** section.

Related Topics

For more information on...	See...
Reconciliation screen	Reconciliation (Used for Searching) on page 2807
Search Reconciliation zone	Search Reconciliation on page 2807

Viewing the Reconciliation Details

Procedure

To view the details of a reconciliation:

1. Search for the reconciliation in the **Reconciliation** screen.
2. In the **Search Results** section, click the link in the **Reconciliation Information** column corresponding to the reconciliation whose details you want to view.
   The **Reconciliation** screen appears. It contains following tabs:
   - Reconciliation - Main on page 2812
   - Reconciliation - Pay Instruction on page 2815
   - Reconciliation - Log on page 2818
3. Ensure that the **Main** tab is selected.
4. View the details of the reconciliation in the **Reconciliation** zone.
5. View the list of pay instructions uploaded through the file in the **Pay Instructions** zone.

Related Topics

For more information on...	See...
How to search for a reconciliation	Searching for a Reconciliation on page 2811

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For more information on...	See...
Reconciliation screen	Reconciliation (Used for Viewing) on page 2812
Reconciliation zone	Reconciliation on page 2812
Pay Instructions zone	Pay Instructions on page 2815

Reconciliation (Used for Viewing)

The **Reconciliation** screen allows you to:

- Edit and delete the details of the reconciliation.
- Submit the pay instructions for reconciliation.
- Reconcile the pay instructions in the reconciliation.
- View the pay instruction statistics for reconciliation.
- Cancel the pending reconciliation.
- View the details and characteristics of the reconciliation.

This screen contains the following tabs:

- Reconciliation - Main on page 2812
- Reconciliation - Pay Instruction on page 2815
- Reconciliation - Log on page 2818

For more information on...	See...
How to view the details of a reconciliation	Viewing the Reconciliation Details on page 2811
How to edit the details of a reconciliation	Editing a Reconciliation Type on page 2802
How to submit the pay instructions of a reconciliation	Submitting Pay Instructions for a Reconciliation on page 2822
How to reconcile the pay instructions of a reconciliation	Reconciling Pay Instructions on page 2822
How to cancel a reconciliation	Canceling a Reconciliation on page 2824
How to delete a reconciliation	Deleting a Reconciliation on page 2821
Reconciliation - Main screen	Reconciliation (Used for Viewing) on page 2812
Reconciliation - Main zone	Reconciliation on page 2812

Reconciliation - Main

The **Main** tab displays information about the reconciliation. It contains the following zones:

- Reconciliation on page 2812

Reconciliation

The **Reconciliation** zone displays the details of the reconciliation. It contains the following sections:

- **Main** - Displays basic information about the reconciliation. It contains the following fields:

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Field Name	Field Description
Reconciliation Information	Displays information about the reconciliation.
Reconciliation Type	Indicates the reconciliation type using which the reconciliation is created. **Note:** It has a link. On clicking the link, the **Reconciliation Type** screen appears where you can view the details of the reconciliation type.
Status	Indicates the status of the reconciliation. The valid values are: • Canceled • Completed • Draft • Initial Reconciliation in Progress • Open • Pending Cancelation • Pending • Pending Reconciliation • Reconciliation in Progress • Void
Status Reason	Indicates the reason why the status of the reconciliation is changed. **Note:** This field appears when the reconciliation is in the **Pending Cancelation** or **Canceled** status. It has a link. On clicking the link, the **Status Reason Display** screen appears where you can view the details of the respective status reason.
File Name	Indicates the pay instruction file for which the reconciliation is created in the system.
Payment Information	Indicates the payment to which the reconciliation is associated. In addition, a context menu (⊙) icon appears corresponding to this field which helps in navigating to other screens in the application. **Note:** It has a link. On clicking the link, the **Payment** screen appears where you can view the details of the respective payment. This field does not appear when the reconciliation is in the **Draft** or **Pending** status.
Account Information	Indicates the payor account to which the reconciliation is associated. **Note:** It has a link. On clicking the link, the **Account** screen appears where you can view the details of the respective account. This field does not appear when the reconciliation is in the **Draft** or **Pending** status.

- **Characteristics** - Lists the characteristics defined for the reconciliation. It contains the following columns:

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Column Name	Column Description
Effective Date	Indicates the date from when the characteristic is effective.
Characteristic Type	Indicates the characteristic type. **Note:** It has a link. On clicking the link, the **Account** screen appears where you can view the details of the respective account.
Characteristic Value	Displays the value of the characteristic type.
Description	Displays the description of the characteristic value. **Note:** The data appears in this column when the type of characteristic value is set to **Predefined Value** or **Foreign Key Value**.

- **Pay Instruction Statistics** - Lists the statistics of records in the reconciliation. It contains the following fields:

Field Name	Field Description
Total Records	Displays total number of records in the reconciliation file.
Total Records in Error	Displays the count of data records in error status.
Total Records Processed	Displays the count of data records derived after processing.
Total Records Pending	Displays the count of data records pending after successful derivation.
Total Records Cancelled	Displays the count of data records derived after unsuccessful processing.
Total Records in Open	Displays the count of data records in open status.
Total Amount	Indicated the sum of money involved in the payment instructions.

- **Record Actions** - This section contains the following buttons:

Button Name	Button Description
Edit	Used to edit the details of the reconciliation. **Note:** The **Edit** button appears when the reconciliation is in the **Pending** or **Draft** status.
Delete	Used to delete the reconciliation. **Note:** The **Delete** button appears when the reconciliation is in the **Pending** or **Draft** status.
Submit for Reconciliation	Used to submit the pay instructions for reconciliation. **Note:** The **Submit for Reconciliation** button appears when the reconciliation is in the **Pending** status.
Cancel	Used to cancel the reconciliation. **Note:** The **Cancel** button appears when the reconciliation is in the **Completed** or **Open** status.
Reconcile	Used to reconcile the pay instructions in the reconciliation.

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Button Name	Button Description
	Note: The **Reconcile** button appears when the reconciliation is in the **Pending Reconciliation** status.
Revert to Pending	Used to revert the status of the reconciliation to **Pending**.
	Note: The **Revert to Pending** button appears when the reconciliation is in the **Pending Reconciliation** status.

- **Record Information** - This section contains the following fields:

Field Name	Field Description
Business Object	Indicates the business object using which the reconciliation is created. In addition, a context menu appears corresponding to this field which helps in navigating to other screens in the application.
	Note: It has a link. On clicking the link, the **Business Object** screen appears where you can view the details of the respective business object.
Status Date Time	Displays the date and time when the reconciliation status is updated.
Creation/Date Time	Displays the date and time when the reconciliation is created.

Reconciliation - Pay Instruction

The **Pay Instruction** tab allows you to search for a pay instruction using various search criteria. It contains the following zone:

- Pay Instructions on page 2815

Pay Instructions

The **Pay Instructions** zone allows you to search for a pay instruction using various search criteria. This zone contains the following sections:

- **Search Criteria** - The **Search Criteria** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Account ID	Used to search for pay instructions which are created for a particular payee account.	No
	Note: The Search (🔍) icon appears corresponding to the **Account ID** field. On clicking the **Search** icon, the **Account Search** window appears.	
Policy Number	Used to search for pay instructions that are linked to a particular policy.	No
	Note: This field appears only when you have selected the **Group** option from the **Reconciliation Type** list while defining a reconciliation type.	

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Field Name	Field Description	Mandatory (Yes or No)
Health Plan	Used to search for pay instructions that are linked to a particular health plan. **Note:** The **Search** (🔍) icon appears corresponding to the **Health Plan** field. On clicking the **Search** icon, the **Health Plan Search** window appears. This field appears only when you have selected the **Individual** option from the **Reconciliation Type** list while defining a reconciliation type.	No
Subscriber Identifier Type	Used to search for pay instructions with a particular member identifier type. **Note:** The list includes only those member identifier types which are already defined in the system.	No
Subscriber Identifier	Used to search for pay instructions with a particular member identifier.	No
Coverage Start Date	Used to search for pay instructions which are created on or after the specified date. **Note:** You can either manually specify the date or select it using the **Date Picker** (📅) icon corresponding to the field.	No
Coverage End Date	Used to search pay instructions which are created on or before the specified date. **Note:** You can either manually specify the date or select it using the **Date Picker** (📅) icon corresponding to the field.	No
Amount From	Used to search for pay instructions with a particular lower limit of the pay instruction amount.	No
Amount To	Used to search for pay instructions with a particular higher limit of the pay instruction amount.	No
Status	Used to search pay instructions with a particular status. The valid values are: • Canceled • Complete • Derivation Pending Processing • Error • Open • Pending • Reconciliation Pending Processing	No
Payment Type	Used to specify the exchange type through which the payment is recieved.	No

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Field Name	Field Description	Mandatory (Yes or No)
	Note: This field appears only when you have selected the **Individual** option from the **Reconciliation Type** list while defining a reconciliation type.	

Note: You must specify at least one search criterion while searching for a pay instruction.

- **Search Results** - On clicking the **Search** button, the search results appear based on the specified search criteria. The **Search Results** section contains the following columns:

Column Name	Column Description
Account Identifier Type	Indicates the account identifier type for the account.
Account Identifier	Indicates the value for the account identifier type.
Account ID	Indicates the payee account which made the payment. **Note:** It has a link. On clicking the link, the **Account** screen appears with the details of the respective account.
Policy Number	Indicates the policy number linked to a particular pay instruction. **Note:** This field appears when you search pay instruction for fully-insured group business.
Plan Number	Displays the plan number associated with the policy. **Note:** This field appears when you search pay instruction for fully-insured group business.
Payor Identifier Type	Displays the identifier type of the payor. **Note:** This field appears when you search pay instruction for fully-insured individual business.
Payor Identifier	Displays the value for the payor identifier type. **Note:** This field appears when you search pay instruction for fully-insured individual business.
Subscriber Identifier Type	Displays the identifier type of the member.
Subscriber Identifier	Displays the value for the member identifier type.
Subscriber Name	Displays the member name.
Health Plan	Displays information about the health plan. **Note:** This field appears when you search pay instruction for fully-insured individual business.
HIOS ID	Displays the health insurance oversight system (HIOS) ID.

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Column Name	Column Description
	Note: This field appears when you search pay instruction for fully-insured individual business.
Coverage Start Date	Displays the date from when the coverage is effective.
Coverage End Date	Displays the date till when the coverage is effective.
Payment Type	Displays the exchange type through which the payment is recieved. **Note:** This field appears when you search pay instruction for fully-insured individual business.
Amount	Displays the amount that has to be paid to the member.
Open Amount	Displays the amount which has not been paid to the member and is still in the open state.
Status	Displays the status of the pay instruction. The valid values are: • Canceled • Complete • Derivation Pending Processing • Error • Open • Pending • Reconciliation Pending Processing
Pay Instruction ID	Displays the pay instruction ID.

On clicking the **View** (🔗) icon corresponding to an **Account Identifier Type** column, the **Pay Instruction** screen appears with the details of the respective pay instruction record.

You can filter the list using various search criteria (such as, **Account ID**, **Health Plan** or **Policy Number**, **Subscriber Identifier Type**, **Subscriber Identifier**, **Coverage Start Date**, **Coverage End Date**, **Amount From**, **Amount To**, and **Status**) available in the **Filter** area. By default, the **Filter** area is hidden. You can view the **Filter** area by clicking the **Filters** (▽) icon in the upper right corner of this zone.

Note: Pagination is used to display limited number of records in the **Search Results** section. You can use the navigation links, such as **Previous** and **Next** to navigate between pages. Note that the navigation links appear in the **Search Results** section only when the records in the search results exceed 20.

Related Topics

For more information on...	See...
How to search for a pay instruction	Searching for a Pay Instruction on page 2825
How to view the details of a pay instruction	Viewing the Pay Instruction Details on page 2826

Reconciliation - Log

The **Log** tab contains the following zone:

- Reconciliation Log on page 2819

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Reconciliation Log

The **Reconciliation Log** zone lists the complete trail of actions performed on the reconciliation. It contains the following columns:

Column Name	Column Description
Creation Date/Time	Displays the date and time when the action was performed on the reconciliation.
Details	Displays the details about the action performed on the reconciliation.
User	Indicates the user who has performed the action on the reconciliation.
Log Type	Indicates the type of log.
Related Object	Indicates the object or entity that is created when the action is performed on the reconciliation. **Note:** It has a link. On clicking the link, the **To Do Entry** screen appears where you can view the details of the respective reconciliation.
Status Reason	Indicates the reason why the status of the reconciliation is changed. **Note:** The data appears in this column when the status of the reconciliation is changed to **Pending Cancelation** or **Canceled**.

Note: You can manually add a log entry for the reconciliation by clicking the **Add Log Entry** link in the upper right corner of the **Reconciliation Log** zone.

Related Topics

For more information on...	See...
How to view the log of a reconciliation	Viewing the Log of a Reconciliation on page 2824
How to add a log entry for a reconciliation	Adding a Log Entry for a Reconciliation on page 2823

Editing a Reconciliation

Procedure

To edit a reconciliation:

1. Search for the reconciliation in **Reconciliation** screen.
   A list appears.
2. In the **Search Results** section, click the link in the **Reconciliation Information** column corresponding to the reconciliation whose details you want to edit.
   The **Reconciliation** screen appears.
3. Ensure that the **Main** tab is selected.
4. Click the **Edit** button in the **Reconciliation** zone.
   The **Member Reconciliation** screen appears.

   It contains the following sections:

   - **Main** - Used to specify the basic details for the reconciliation.
   - **Characteristics** - Used to define the characteristics for the reconciliation.

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The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Reconciliation Information	Displays information about the reconciliation.	Not applicable
Reconciliation Type	Indicates the reconciliation type using which the reconciliation is created.	Not applicable
File Name	Indicates the pay instruction file for which the reconciliation is created in the system.	Not applicable
Payment Information	Indicates the payment to which the reconciliation is associated. **Note:** The **Search** (🔍) icon appears corresponding to the **Payment Information** field. On clicking the **Search** icon, the **Payment Search** window appears. On specifying the value for a payment, the description of the payment appears corresponding to the **Payment Information** field.	No

Note: The **Edit** button appears only when the reconciliation is in the **Pending** status.

5. Modify the required details in the **Main** section.
6. Define, edit, or remove characteristics of the reconciliation, if required.
7. Click **Save**.
   The changes made to the reconciliation are saved.

Related Topics

For more information on...	See...
How to search for a reconciliation	Searching for a Reconciliation on page 2811
Reconciliation screen	Reconciliation (Used for Viewing) on page 2812
Reconciliation zone	Reconciliation on page 2812

Defining a Characteristic for a Reconciliation

Prerequisites

To define a characteristic for a reconciliation, you should have:

- Characteristic types defined in the application (where the characteristic entity is set to **Reconciliation**)

Procedure

To define a characteristic for a reconciliation:

1. Ensure that the **Characteristics** section is expanded when you are editing a reconciliation.

   The **Characteristics** section contains the following fields:

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Field Name	Field Description	Mandatory (Yes or No)
Effective Date	Used to specify the date from when the characteristic is effective for the reconciliation. **Note:** You can either manually specify the date or select it using the **Date Picker** ( ) icon corresponding to the field.	Yes (Conditional) **Note:** This field is required when you are defining a characteristic for the reconciliation.
Characteristic Type	Used to indicate the characteristic type. **Note:** The list includes only those characteristic types where the characteristic entity is set to **Reconciliation**.	Yes (Conditional) **Note:** This field is required when you are defining a characteristic for the reconciliation.
Characteristic Value	Used to specify the value for the characteristic type. **Note:** If you select a predefined characteristic type, the **Search** ( ) icon appears corresponding to the **Characteristic Value** field. On clicking the **Search** icon, the **Predefined Characteristic Search** window appears. On specifying the value for a predefined characteristic type, the description of the characteristic value appears corresponding to the **Characteristic Value** field.	Yes (Conditional) **Note:** This field is required when you are defining a characteristic for the reconciliation.

2. Enter the required details in the **Characteristics** section.
3. If you want to define more than one characteristic for the reconciliation, click the **Add** (+) icon and then repeat *s*tep 2.

Note: However, if you want to remove a characteristic from the reconciliation, click the **Delete** ( ) icon corresponding to the characteristic.

Related Topics

For more information on...	See...
How to edit an reconciliation	Editing a Reconciliation on page 2819

Deleting a Reconciliation

Procedure

To delete a reconciliation:

1. Search for the reconciliation in the **Reconciliation** screen.
2. In the **Search Results** section, click the link in the **Reconciliation Information** column corresponding to the *r*econciliation that you want to delete.
   The **Reconciliation** screen appears.
3. Ensure that the **Main** tab is selected.
4. Click the **Delete** button in the **Reconciliation** zone.
   A message appears confirming whether you want to delete the reconciliation.

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> **Note:** The **Delete** button appears when the reconciliation is in the **Pending** or **Draft** status.

5. Click **OK**.
   The reconciliation object is deleted.

Related Topics

For more information on...	See...
How to search for a reconciliation	Searching for a Reconciliation on page 2811
Reconciliation screen	Reconciliation (Used for Viewing) on page 2812
Search Reconciliation zone	Search Reconciliation on page 2807

Submitting Pay Instructions for a Reconciliation

Prerequisites

To submit pay instructions for reconciliation, you should have:

- Reconciliation BO status as pending.
- The account information of the payment defined in the application.

Procedure

To submit pay instructions for a reconciliation:

1. Search for the reconciliation in the **Reconciliation** screen.
2. In the **Search Results** section, click the link in the **Reconciliation Information** column corresponding to the *r*econciliation that you want to submit.
   The **Reconciliation** screen appears.
3. Ensure that the **Main** tab is selected.
4. Click the **Submit for Reconciliation** button in the **Reconciliation** zone.
   The pay instruction is submitted for reconciliation and the reconciliation status gets changed to **Pending Reconciliation**.

> **Note:**
>
> The **Submit for Reconciliation** button appears when the reconciliation is in the **Pending** status.

Related Topics

For more information on...	See...
How to search for a reconciliation	Searching for a Reconciliation on page 2811
Search Reconciliation screen	Reconciliation (Used for Viewing) on page 2812
Search Reconciliation zone	Search Reconciliation on page 2807

Reconciling Pay Instructions

Prerequisites

To reconcile pay instructions, you should have:

- Account ID defined in the application.

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- Reconciliation status must be in **Pending Reconciliation**.

Procedure

To reconcile pay instructions:

1. Search for the reconciliation in the **Reconciliation** screen.
2. In the **Search Results** section, click the link in the **Reconciliation Information** column corresponding to the *r*econciliation that you want to reconcile.
   The **Reconciliation** screen appears.
3. Ensure that the **Main** tab is selected.
4. Click the **Reconcile** button in the **Reconciliation** zone.
   The pay instructions gets reconciled and the reconciliation status gets changed to **Open**.

> **Note:**
>
> The **Reconcile** button appears when the reconciliation is in the **Pending Reconciliation** status.

Related Topics

For more information on...	**See...**
How to search for a reconciliation	Searching for a Reconciliation on page 2811
Search Reconciliation screen	Reconciliation (Used for Viewing) on page 2812
Search Reconciliation zone	Search Reconciliation on page 2807

Adding a Log Entry for a Reconciliation

Procedure

To add a log entry for a reconciliation:

1. Search for the reconciliation in the **Reconciliation** screen.
2. In the **Search Results** section, click the link in the **Reconciliation Information** column corresponding to the *r*econciliation for which you want to add a log entry.
   The **Reconciliation** screen appears.
3. Click the **Log** tab.
   The **Log** tab appears.
4. Click the **Add Log Entry** link in the upper right corner of the **Reconciliation Log** zone.

   The **Add Reconciliation Log** window appears. It contains the following fields:

Field Name	**Field Description**	**Mandatory (Yes or No)**
Reconciliation Information	Displays information about the reconciliation.	Not applicable
Log Details	Used to specify additional comments for the reconciliation.	Yes

5. Enter the comments in the **Log Details** field.
6. Click **Save**.
   The log entry is added in the **Reconciliation Log** zone.

Related Topics

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For more information on...	See...
How to search for a reconciliation	Searching for a Reconciliation on page 2811
Reconciliation screen	Reconciliation (Used for Viewing) on page 2812
Reconciliation Log zone	Reconciliation Log on page 2819

Viewing the Log of a Reconciliation

Procedure

To view the log of a reconciliation:

1. Search for the reconciliation in the **Reconciliation** screen.
2. In the **Search Results** section, click the link in the **Reconciliation Information** column corresponding to the *r*econciliation whose log you want to view.
   The **Reconciliation** screen appears.
3. Click the **Log** tab.
   The **Log** tab appears.
4. View the complete trail of actions performed on the reconciliation in the **Reconciliation Log** zone.

Related Topics

For more information on...	See...
How to search for a reconciliation	Searching for a Reconciliation on page 2811
Reconciliation screen	Reconciliation (Used for Viewing) on page 2812
Reconciliation Log zone	Reconciliation Log on page 2819
How to add a log entry for a reconciliation	Adding a Log Entry for a Reconciliation on page 2823

Canceling a Reconciliation

Prerequisites

To cancel a reconciliation, you should have:

- Reasons defined for the **Canceled** status of the **C1-MemberReconciliation** business object in the **Status Reason** screen.

Procedure

To cancel a reconciliation:

1. Search for the reconciliation in the **Reconciliation** screen.
2. In the **Search Results** section, click the link in the **Reconciliation Information** column corresponding to the *r*econciliation that you want to cancel.
   The **Reconciliation** screen appears.
3. Ensure that the **Main** tab is selected.
4. Click the **Cancel** button in the **Reconciliation** zone.

   The **Status Reason** window appears. It contains following field:

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Field Name	Field Description	Mandatory (Yes or No)
Status Reason	Used to indicate the reason why you want to cancel the reconciliation. **Note:** The list includes only those reasons which are defined for the **Canceled** status of the **C1-MemberReconciliation** business object through the **Status Reason** screen.	Yes

Note: The **Cancel** button appears when the reconciliation is in the **Open** or **Completed** status.

5. Select the reason for canceling the reconciliation from the **Status Reason** list.
6. Click **Save**.
   The status of the reconciliation is changed to **Canceled**.

Related Topics

For more information on...	See...
How to search for a reconciliation	Searching for a Reconciliation on page 2811
Reconciliation screen	Reconciliation (Used for Viewing) on page 2812
Reconciliation zone	Reconciliation on page 2812
How to view details of reconciliation	Viewing the Reconciliation Details on page 2811

Searching for a Pay Instruction

Prerequisite

To search for a pay instruction, you should have:

- Pay instruction statuses and subscriber identifier types defined in the application.

Procedure

To search for a pay instruction:

1. Search for the reconciliation in the **Reconciliation** screen.
2. In the **Search Results** section, click the link in the **Reconciliation Information** column corresponding to the reconciliation whose details you want to view.
   The **Reconciliation** screen appears.
3. Click the **Pay Instruction** tab.
   The **Pay Instruction** tab appears.
4. Enter the search criteria in the **Pay Instruction** zone.

Note: ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.

5. Click **Search**.
   A list of pay instructions that meet the search criteria appears in the **Search Results** section.

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Related Topics

For more information on...	See...
Reconciliation screen	Reconciliation (Used for Searching) on page 2807
Search Reconciliation zone	Search Reconciliation on page 2807
Pay Instruction zone	Pay Instructions on page 2815

Viewing the Pay Instruction Details

Procedure

To view the details of a pay instruction:

1. Search for the reconciliation in the **Reconciliation** screen.
2. In the **Search Results** section, click the link in the **Reconciliation Information** column corresponding to the reconciliation whose pay instruction details you want to view.
   The **Reconciliation** screen appears. It contains following tabs:
   - Reconciliation - Main on page 2812
   - Reconciliation - Pay Instruction on page 2815
   - Reconciliation - Log on page 2818
3. Click the **Pay Instruction** tab.
   The **Pay Instruction** tab appears.
4. Enter the search criteria in the **Pay Instructions** zone.
5. Click **Search**.
   A list of pay instruction that meet the search criteria appears in the **Search Results** section.
6. In the **Search Results** section, click the **View** (🔗) icon corresponding to the **Account Identifier Type** column.
   The **Pay Instruction** screen appears.
7. Ensure that the **Main** tab is selected.
8. View the details of the pay instruction in the **Pay Instruction** zone.

Related Topics

For more information on...	See...
Searching for a Reconciliation	Searching for a Reconciliation on page 2811
Reconciliation screen	Reconciliation (Used for Viewing) on page 2812
Reconciliation - Main zone	Reconciliation - Main on page 2812
Pay Instructions screen	Pay Instruction (Used for Viewing) on page 2826
Pay Instruction zone	Pay Instruction on page 2827

Pay Instruction (Used for Viewing)

The **Pay Instruction** screen allows you to search for a pay instruction which is the part of reconciliation using various search criteria. It also allows you to:

- View the details and characteristics of the pay instruction
- View the details of the reconciliation adjustments
- View the related objects

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This screen contains of the following tabs:

- Pay Instruction - Main on page 2827
- Pay Instruction - Log on page 2830

Pay Instruction - Main

The **Pay Instruction - Main** tab displays information about the pay instruction. It contains the following zones:

- Pay Instruction on page 2827
- Reconciliation Adjustments on page 2829
- Related Objects on page 2830

Pay Instruction

The **Pay Instruction** zone displays the payment related information that is specific to each member. It contains the following sections:

- **Main** - Displays the basic information about the pay instruction. It contains the following fields:

Field Name	Field Description
Pay Instruction Information	Displays information about the pay instruction in brief.
Reconciliation Information	Displays information about the reconciliation. **Note:** It has a link. On clicking the link, the **Reconciliation** screen appears where you can view the details of the respective reconciliation.
Status	Indicates the status of the pay instruction. The valid values are: • Canceled • Completed • Derivation Pending Processing • Error • Open • Pending • Reconciliation Pending Processing
Coverage Start Date	Displays the date of the policy from when the coverage starts.
Coverage End Date	Displays the date of the policy till when the coverage ends.
Account Identifier Type	Displays the account identifier type of the member.
Account Identifier	Displays the value for the account identifier type.
Account Information	Displays information about the account of the member. **Note:** It has a link. On clicking the link, the **Account** screen appears where you can view the details of the respective account.
Policy Number	Displays the policy number of the member. **Note:** This field appears only when you are viewing the details of a pay instruction which is created for the fully insured group business.
Plan Number	Displays the plan number of the member.

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Field Name	Field Description
	Note: This field appears only when you are viewing the details of a pay instruction which is created for the fully insured group business.
Health Plan	Displays information about the health plan. **Note:** This field appears only when you are viewing the details of a pay instruction which is created for the fully insured individual business.
HIOS ID	**Note:** This field appears only when you are viewing the details of a pay instruction which is created for the fully insured individual business.
Payment Type	Displays the type of tender through which the payment is made. **Note:** This field appears only when you are viewing the details of a pay instruction which is created for the fully insured individual business.
Payor Identifier Type	Displays the payor identifier type. **Note:** This field appears only when you are viewing the details of a pay instruction which is created for the fully insured individual business.
Payor Identifier	Displays the payor identifier. **Note:** This field appears only when you are viewing the details of a pay instruction which is created for the fully insured individual business.
Subscriber Identifier Type	Displays the subscriber identifier type of the member.
Subscriber Identifier	Displays the subscriber identifier of the member.
Subscriber Name	Displays the subscriber name of the member.
Payment Instruction Amount	Displays the amount that has to be paid to the member.
Open Amount	Displays the amount which has not been paid to the member and is still in the open state.

In addition, the following sub-section appears in the **Main** section:

- **Pay Instruction Amount** - This sub-section provides information about the pay instruction amount. It contains the following fields:

Field Name	Field Description
Payment Instruction Amount	Displays the amount that has to be paid to the member.
Open Amount	Displays the amount which has not been paid to the member and is still in the open state.

- **Record Information** - This section provides information on the pay instruction business object. It contains the following fields:

Field Name	Field Description
Business Object	Indicates the business object using which the pay instructions are executed. In addition, a context menu (⊙) icon appears corresponding to this field which helps in navigating to other screens in the application.

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Field Name	Field Description
	Note: It has a link. On clicking the link, the **Business Object** screen appears where you can view the details of the respective business object.
Status Date Time	Displays the date and time when the pay instruction object status is updated.
Creation Date/Time	Displays the date and time when the pay instruction object is created.

- **Characteristics** - This section provides characteristic information for the pay instruction.

Field Name	Field Description
Characteristic Type	Displays the characteristic type.
	Note: It has a link. On clicking the link, the **Characteristic Type** screen appears where you can view the details of the respective characteristic type.
Characteristic Value	Displays the value of characteristic type.
Description	Displays the description of the characteristic type.

Related Topics

For more information on...	See...
How to view the details of reconciliation	Viewing the Pay Instruction Details on page 2826
Pay Instruction screen	Pay Instruction (Used for Viewing) on page 2826
Pay Instruction zone	Pay Instruction on page 2827

Reconciliation Adjustments

The **Reconciliation Adjustments** zone displays the adjustment information for each pay instruction. It contains the following columns:

Column Name	Column Description
Transfer Adjustment	Indicates the amount to be transferred from a reconciliation contract against a pay instruction.
	Note: It has a link. On clicking the link, the **Adjustment** screen appears where you can view the details of the transferred adjustment.
Transfer Type	Displays the type of transaction made against a pay instruction or an internal offsetting.
Transfer Financial Transaction ID	Displays the transfer financial transaction ID.
Offset Adjustment	Indicates a reciprocal adjustment that is associated with a transfer adjustment.
	Note: It has a link. On clicking the link, the **Adjustment** screen appears where you can view the offset adjustment details.
Related Object Type	Displays the related object type whether it is pay instruction or financial transaction.

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Column Name	Column Description
Related Object ID	Indicates the ID of the related pay instruction or financial transaction created in reconciliation process.
	Note: It has a link. On clicking the link, the **Financial Transaction** screen appears where you can view the details of the financial transaction of reconciliation adjustments.

Note: Pagination is used to display limited number of records in the **Reconciliation Adjustments** zone. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

You can filter the adjustments using **Show All Adjustments** available in the **Filter** area. By default, the **Filter** area is hidden. You can view the **Filter** area by clicking the **Filters** (▽) icon in the upper right corner of the **Reconciliation Adjustments** zone.

Related Objects

The **Related Objects** zone displays all those business objects based on which reconciliation process takes place. It contains the following columns:

Column Name	Column Description
Related Object Type	Displays the related object type that was used in the pay instruction process.
Related Object Information	Displays the details of related object in brief.
	Note: It has a link. On clicking the link, the respective related object screen appears with the details of the related object depending on the related object type.

Note: Pagination is used to display limited number of records in the **Related Topics** zone. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

Pay Instruction - Log

The **Pay Instruction - Log** tab contains the following zone:

- Pay Instruction Log on page 2830

Pay Instruction Log

The **Pay Instruction Log** zone lists the complete trail of actions performed on the pay instructions. It contains the following columns:

Column Name	Column Description
Creation Date/Time	Displays the date and time when the action was performed on the pay instruction.
Details	Displays the details about the action performed on the pay instruction.
User	Indicates the user who has performed the action on the pay instruction.
Log Type	Indicates the type of log.
Related Object	Indicates the object or entity which is created when the action is performed on the pay instruction.

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Column Name	Column Description
	Note: At present, no data appears in this column. The implementation team can build the custom logic to meet the business requirements.
Status Reason	Indicates the status reason of action performed on the pay instruction.

Note: You can manually add a log entry for the pay instruction by clicking the **Add Log Entry** link in the upper right corner of the **Pay Instruction Log** zone.

Related Topics

For more information on...	See...
How to view the log of a pay instruction	Viewing the Log of a Pay Instruction on page 2832
How to add a log entry for a pay instruction	Adding a Log Entry for a Pay Instruction on page 2831

Adding a Log Entry for a Pay Instruction

Procedure

To add a log entry for a pay instruction:

1. Search for the reconciliation in the **Reconciliation** screen.
2. In the **Search Results** section, click the link in the **Reconciliation Information** column corresponding to the reconciliation for which you want to add a log entry.
   The **Reconciliation** screen appears.
3. Click the **Pay Instruction** tab.
   The **Pay Instruction** tab appears.
4. Enter the search criteria in the **Pay Instruction** zone.
5. Click **Search**.
   A list of pay instructions that meet the search criteria appears in the **Search Results** section.
6. In the **Search Results** section, click the Go To (🔗) icon corresponding to the pay instruction for which you want to add a log entry.
   The **Pay Instruction** screen appears. It consists of the following tabs:
   - Pay Instruction - Main on page 2827
   - Pay Instruction - Log on page 2830
7. Click the **Log** tab.
   The **Log** tab appears.
8. Click the **Add Log Entry** link in the upper right corner of the **Pay Instruction Log** zone.
   The **Add Pay Instruction Log** window appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Pay Instruction Information	Displays information about the pay instruction.	Not applicable
Log Details	Used to specify additional comments for the pay instruction.	Yes

9. Enter the comments in the **Log Details** field.
10. Click **Save**.
    The log entry is added in the **Pay Instruction Log** zone.

Related Topics

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For more information on...	See...
How to search for a reconciliation	Searching for a Reconciliation on page 2811
Reconciliation screen	Reconciliation (Used for Viewing) on page 2812
Reconciliation zone	Reconciliation on page 2812
Pay Instruction screen	Pay Instruction (Used for Viewing) on page 2826
Pay Instruction zone	Pay Instruction on page 2827
How to view the log of a pay instruction	Viewing the Log of a Pay Instruction on page 2832

Viewing the Log of a Pay Instruction

Procedure

To view the log of a pay instruction:

1. Search for the reconciliation in the **Reconciliation** screen.
2. In the **Search Results** section, click the link in the **Reconciliation Information** column corresponding to the *r*econciliation, whose pay instruction log you want to view.
   The **Reconciliation** screen appears.
3. Click the **Pay Instruction** tab.
   The **Pay Instruction** tab appears.
4. Enter the search criteria in the **Pay Instruction** zone.
5. Click **Search**.
   A list of pay instructions that meet the search criteria appears in the **Search Results** section.
6. In the **Search Results** section, click the Go To (🔗) icon corresponding to the pay instruction for which you want to add a log entry.
   The **Pay Instruction** screen appears. It consists of the following tabs:
   - Pay Instruction - Main on page 2827
   - Pay Instruction - Log on page 2830
7. Click the **Log** tab.
   The **Log** tab appears.
8. View the complete trail of actions performed on the pay instruction in the **Pay Instruction Log** zone.

Related Topics

For more information on...	See...
How to search for a reconciliation	Searching for a Reconciliation on page 2811
Reconciliation screen	Reconciliation (Used for Viewing) on page 2812
Reconciliation zone	Reconciliation on page 2812
Pay Instruction screen	Pay Instruction (Used for Viewing) on page 2826
Pay Instruction Log zone	Pay Instruction Log on page 2830
How to add a log entry for a pay instruction	Adding a Log Entry for a Pay Instruction on page 2831

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Discrepancy Report Type

Oracle Revenue Management and Billing allows you to define a discrepancy report type using which you can create a discrepancy report. It is the discrepancy report type which helps the system to determine the following:

- Business object using which the discrepancy report should be created in the system.

The **Discrepancy Report Type** screen allows you to define, edit, copy, and delete a discrepancy report type. It consists of the following zones:

- Discrepancy Report Type List on page 2833
- Discrepancy Report Type on page 2834

For more information on...	See...
How to define a discrepancy report type	Defining a Discrepancy Report Type on page 2835
How to edit a discrepancy report type	Editing a Discrepancy Report Type on page 2838
How to copy a discrepancy report type	Copying a Discrepancy Report Type on page 2840
How to delete a discrepancy report type	Deleting a Discrepancy Report Type on page 2840

Discrepancy Report Type List

The **Discrepancy Report Type List** zone lists the various types of discrepancy report types that are already defined in the system. It contains the following columns:

Column Name	Column Description
Discrepancy Report Type	Displays the discrepancy report type.
Description	Displays the description of the discrepancy report type.
Edit	On clicking the **Edit** (✎) icon, the **Discrepancy Report Type** screen appears where you can edit the details of the discrepancy report type.
Duplicate	On clicking the **Duplicate** (⧉) icon, the **Discrepancy Report Type** screen appears where you can define a new discrepancy report type using an existing discrepancy report type.
Delete	On clicking the **Delete** (🗑) icon, you can delete the discrepancy report type.
	Note: You can delete a discrepancy report type only when a discrepancy report is not yet created using the discrepancy report type.

On clicking the **Broadcast** (📡) icon corresponding to a discrepancy report type, the **Discrepancy Report Type** zone appears with the details of the respective discrepancy report type.

Related Topics

For more information on...	See...
How to edit the details of discrepancy report type	Editing a Discrepancy Report Type on page 2838

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For more information on...	See...
How to delete the discrepancy report type	Deleting a Discrepancy Report Type on page 2840
How to copy the discrepancy report type	Copying a Discrepancy Report Type on page 2840
How to view the details of discrepancy report type	Viewing the Discrepancy Report Type Details on page 2842

Discrepancy Report Type

The **Discrepancy Report Type** zone displays the details of the discrepancy report type. It consists of the following sections:

- **Main** - Displays the basic information about the discrepancy report type. It contains the following fields:

Field Name	Field Description
Discrepancy Report Type	Displays the discrepancy report type.
Discrepancy Report Business Object	Indicates the business object using which a discrepancy report should be created. In addition, a context menu (⊙) icon appears corresponding to this field which helps in navigating to other screens in the application. **Note:** It has a link. On clicking the link, the **Business Object** screen appears where you can view the details of the respective business object.
Description	Displays the description of the discrepancy report type.
Detailed Description	Displays additional information about the discrepancy report type.
Status	Indicates the status of the discrepancy report type. The valid values are: • Active • Inactive

- **Record Actions** - Enables you to perform various actions on the discrepancy report type. It contains the following buttons:

Button Name	Button Description
Edit	Used to edit the details of the discrepancy report type.
Delete	Used to delete the discrepancy report type. **Note:** You can delete a discrepancy report type when a discrepancy report is not yet created using the discrepancy report type.
Duplicate	Used to create a new discrepancy report type using an existing discrepancy report type.

- **Record Information** - This section contains the following field:

Field Name	Field Description
Business Object	Indicates the business object using which the discrepancy report type is created. In addition, a context menu (⊙) icon appears corresponding to this field which helps in navigating to other screens in the application.

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Field Name	Field Description
	Note: It has a link. On clicking the link, the **Business Object** screen appears where you can view the details of the respective business object.

- **Characteristics** - Lists the characteristics of the discrepancy report type. It contains the following columns:

Column Name	Column Description
Characteristic Type	Indicates the characteristic type.
	Note: It has a link. On clicking the link, the **Characteristic Type** screen appears where you can view the details of the respective account.
Characteristic Value	Displays the value of the characteristic type.
	Note: On specifying the value for a predefined characteristic type, the description of the characteristic value appears corresponding to the **Characteristic Value** field.
Description	Displays the description of the characteristic value.

By default, the **Discrepancy Report Type** zone does not appear in the **Discrepancy Report Type** screen. It appears when you click the **Broadcast** (📡) icon corresponding to a discrepancy report type in the **Discrepancy Report Type List** zone.

Related Topics

For more information on...	See...
Discrepancy Report Type screen	Discrepancy Report Type on page 2833
Discrepancy Report Type List zone	Discrepancy Report Type List on page 2833
How to define a discrepancy report type	Defining a Discrepancy Report Type on page 2835
How to edit a discrepancy report type	Editing a Discrepancy Report Type on page 2838
How to copy a discrepancy report type	Copying a Discrepancy Report Type on page 2840
How to delete a discrepancy report type	Deleting a Discrepancy Report Type on page 2840
How to view the details of discrepancy report type	Viewing the Discrepancy Report Type Details on page 2842

Defining a Discrepancy Report Type

Prerequisites

To define a discrepancy report type, you should have:

- Discrepancy report business objects defined in the application.
- Characteristic type defined for the discrepancy report.

Procedure

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To define a discrepancy report type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **D**, and then click **Discrepancy Report Type**.
   A sub-menu appears.
3. Click the **Add** option from the **Discrepancy Report Type** sub-menu.
   The **Select Business Object** screen appears. It contains the following field:

Field Name	Field Description	Mandatory (Yes or No)
Discrepancy Report Type Business Object	Used to indicate the business object using which you want to create the discrepancy report type. The valid value is: • **Discrepancy Report Type (i.e., C1-MemberDiscReportType)** - Enables you to maintain a discrepancy report type. **Note:** The above business object is shipped with the product. The list includes those business objects which are created using the **Discrepancy Report Type** (i.e., **C1-DSC-RP-TY**) maintenance object.	Yes

Tip: Alternatively, you can access the **Select Business Object** screen by clicking the **Add** button in the **Page Title** area of the **Discrepancy Report Type** screen.

Note: The **Select Business Object** screen appears when there are multiple discrepancy report type business objects defined in the application. If there is only one discrepancy report type business object defined in the application, the **Discrepancy Report Type** screen appears.

4. Select the required discrepancy report type business object from the respective field.
5. Click **OK**.
   The **Discrepancy Report Type** screen appears. It contains the following sections:
   - **Main** - Used to specify the basic details for the discrepancy report type.
   - **Characteristics** - Used to define the characteristics for the discrepancy report type.

   The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Discrepancy Report Type	Used to specify the discrepancy report type.	Yes
Business Object	Indicates the business object using which you are defining the discrepancy report type.	Not applicable
Discrepancy Report Business Object	Used to indicate the business object using which you want to create the discrepancy report. The valid value is: • **Discrepancy Report (i.e., C1-DiscrepancyReport)**- Enables you to create a discrepancy report. **Note:** The above mentioned business object is shipped with the product. The list includes those business objects which are created using the **Discrepancy Report Type** (i.e., **C1-DSC-RP-TY**) maintenance object.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
Description	Used to specify the description for the discrepancy report type.	Yes
Detailed Description	Used to specify additional information about the discrepancy report type. **Note:** You can resize the text box depending on your requirement by clicking the **Resize Handle** (⊿) icon at the bottom right corner of the text box.	No
Status	Used to indicate the status of the discrepancy report type. The valid values are: • Active • Inactive	Yes

6. Enter the required details in the **Main** section.
7. Define characteristics for the discrepancy report type, if required.
8. Click **Save**.
   The discrepancy report type is defined.

Related Topics

For more information on...	See...
Discrepancy Report Type screen	Discrepancy Report Type on page 2833
How to define a characteristic for a discrepancy report type	Defining a Characteristic for a Discrepancy Report Type on page 2837

Defining a Characteristic for a Discrepancy Report Type

Prerequisites

To define a characteristic for a discrepancy report type, you should have:

- Characteristic types defined in the application (where the characteristic entity is set to **Discrepancy Report Type**).

Procedure

To define a characteristic for a discrepancy report type:

1. Ensure that the **Characteristics** section is expanded when you are defining, editing, or copying a discrepancy *r*eport type.

   The **Characteristics** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Characteristic Type	Used to indicate the characteristic type. **Note:** The list includes only those characteristic types where the characteristic entity is set to **Discrepancy Report Type**.	Yes (Conditional) **Note:** This field is required when you are defining a characteristic for the discrepancy report type.
Characteristic Value	Used to specify the value for the characteristic type.	Yes (Conditional)

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Field Name	Field Description	Mandatory (Yes or No)
	Note: If you select a predefined characteristic type, the **Search** (🔍) icon appears corresponding to the **Characteristic Value** field. On clicking the **Search** icon, the **Predefined Characteristic Search** window appears. On specifying the value for a predefined characteristic type, the description of the characteristic value appears corresponding to the **Characteristic Value** field.	**Note:** This field is required when you are defining a characteristic for the discrepancy report type.

2. Enter the required details in the **Characteristics** section.
3. If you want to define more than one characteristic for the discrepancy report type, click the **Add** (+) icon and then *r*epeat step 2.

Note: However, if you want to remove a characteristic from the discrepancy report type, click the **Delete** (🗑) icon corresponding to the characteristic.

Related Topics

For more information on...	See...
How to define a discrepancy report type	Defining a Discrepancy Report Type on page 2835
How to edit a discrepancy report type	Editing a Discrepancy Report Type on page 2838
How to copy a discrepancy report type	Copying a Discrepancy Report Type on page 2840

Editing a Discrepancy Report Type

Prerequisites

To edit a discrepancy report type, you should have:

- Discrepancy report business objects defined in the application.
- Characteristic type defined for the discrepancy report.

Procedure

To edit a discrepancy report type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **D** and then click **Discrepancy Report Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Discrepancy Report Type** sub-menu.
   The **Discrepancy Report Type** screen appears.
4. In the **Discrepancy Report Type List** zone, click the **Edit** (✎) icon in the **Edit** column corresponding to the discrepancy *r*eport type whose details you want to edit.

   The **Discrepancy Report Type** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details for the discrepancy report type.

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- **Characteristics** - Used to define the characteristics for the discrepancy report type.

The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Discrepancy Report Type	Used to specify the discrepancy report type.	Not applicable
Business Object	Indicates the business object using which you are defining the discrepancy report type.	Not applicable
Discrepancy Report Business Object	Used to indicate the business object using which you want to create the discrepancy report. The valid value is: • **Discrepancy Report (i.e., C1-DiscrepancyReport)**- Enables you to create a discrepancy report. **Note:** The above mentioned business object is shipped with the product. The list includes those business objects which are created using the **Discrepancy Report Type** (i.e., **C1-DSC-RP-TY**) maintenance object.	Yes
Description	Used to specify the description for the discrepancy report type.	Yes
Detailed Description	Used to specify additional information about the discrepancy report type. **Note:** You can resize the text box depending on your requirement by clicking the **Resize Handle** (⊿) icon at the bottom right corner of the text box.	No
Status	Used to indicate the status of the discrepancy report type. The valid values are: • Active • Inactive	Yes

Tip: Alternatively, you can click the **Edit** button in the **Discrepancy Report Type** zone to edit the details of the discrepancy report type.

5. Modify the required details in the **Main** section.
6. Define, edit, or remove characteristics of the discrepancy report type, if required.
7. Click **Save**.
   The changes made to the discrepancy report type are saved.

Related Topics

For more information on...	See...
Discrepancy Report Type screen	Discrepancy Report Type on page 2833
Discrepancy Report Type List zone	Discrepancy Report Type List on page 2833
Discrepancy Report Type zone	Discrepancy Report Type on page 2834
How to define a characteristic for a discrepancy report type	Defining a Characteristic for a Discrepancy Report Type on page 2837

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Deleting a Discrepancy Report Type

Procedure

To delete a discrepancy report type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **D** and then click **Discrepancy Report Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Discrepancy Report Type** sub-menu.
   The **Discrepancy Report Type** screen appears.
4. In the **Discrepancy Report Type List** zone, click the **Delete** (🗑) icon in the **Delete** column corresponding to the *d*iscrepancy report type that you want to delete.
   A message appears confirming whether you want to delete the discrepancy report type.

> **Note:** You can delete a discrepancy report type only when a discrepancy report is not yet created using the discrepancy report type.

> **Tip:** Alternatively, you can click the **Delete** button in the **Discrepancy Report Type** zone to delete the discrepancy report type.

5. Click **OK**.
   The discrepancy report type is deleted.

Related Topics

For more information on...	See...
Discrepancy Report Type screen	Discrepancy Report Type on page 2833
Discrepancy Report Type List zone	Discrepancy Report Type List on page 2833
Discrepancy Report Type zone	Discrepancy Report Type on page 2834

Copying a Discrepancy Report Type

Instead of creating a discrepancy report type from scratch, you can create a new discrepancy report type using an existing discrepancy report type. This is possible through copying a discrepancy report type. On copying a discrepancy report type, the details including the characteristics are copied to the new discrepancy report type. You can then edit the details, if required.

Prerequisites

To copy a discrepancy report type, you should have:

- Discrepancy report business objects defined in the application.
- Characteristic type defined for the discrepancy report.

Procedure

To copy a discrepancy report type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **D** and then click **Discrepancy Report Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Discrepancy Report Type** sub-menu.

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The **Discrepancy Report Type** screen appears.

4. In the **Discrepancy Report Type List** zone, click the **Duplicate** (⧉) icon in the **Duplicate** column *c*orresponding to the discrepancy report type whose copy you want to create.

   The **Discrepancy Report Type** screen appears. It contains the following sections:

   - **Main** - Used to specify the basic details for the discrepancy report type.
   - **Characteristics** - Used to define the characteristics for the discrepancy report type.

   The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Discrepancy Report Type	Used to specify the discrepancy report type.	Yes
Business Object	Indicates the business object using which you are defining the discrepancy report type.	Not applicable
Discrepancy Report Business Object	Used to indicate the business object using which you want to create the discrepancy report. The valid value is: • **Discrepancy Report (i.e., C1-DiscrepancyReport)**- Enables you to create a discrepancy report. **Note:** The above mentioned business object is shipped with the product. The list includes those business objects which are created using the **Discrepancy Report Type** (i.e., **C1-DSC-RP-TY**) maintenance object.	Yes
Description	Used to specify the description for the discrepancy report type.	Yes
Detailed Description	Used to specify additional information about the discrepancy report type. **Note:** You can resize the text box depending on your requirement by clicking the **Resize Handle** (⇲) icon at the bottom right corner of the text box.	No
Status	Indicates the status of the discrepancy report type. The valid values are: • Active • Inactive	Yes

Tip: Alternatively, you can click the **Duplicate** button in the**Discrepancy Report Type** zone to create a copy of the discrepancy report type.

5. Enter the required details in the **Main** section.
6. Define, edit, or remove characteristics of the discrepancy report type, if required.
7. Click **Save**.
   The new discrepancy report type is defined.

Related Topics

For more information on...	See...
Discrepancy Report Type screen	Discrepancy Report Type on page 2833

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For more information on...	See...
Discrepancy Report Type List zone	Discrepancy Report Type List on page 2833
Discrepancy Report Type zone	Discrepancy Report Type on page 2834
How to define a characteristic for a discrepancy report type	Defining a Characteristic for a Discrepancy Report Type on page 2837

Viewing the Discrepancy Report Type Details

Procedure

To view the details of a discrepancy report type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **D** and then click **Discrepancy Report Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Discrepancy Report Type** sub-menu.
   The **Discrepancy Report Type** screen appears.
4. In the **Discrepancy Report Type List** zone, click the **Broadcast** (⦾) icon corresponding to the discrepancy report type *w*hose details you want to view.
   The **Discrepancy Report Type** zone appears.
5. View the details of the discrepancy type in the **Discrepancy Report Type** zone.

Related Topics

For more information on...	See...
Discrepancy Report Type screen	Discrepancy Report Type on page 2833
Discrepancy Report Type List zone	Discrepancy Report Type List on page 2833
Discrepancy Report Type zone	Discrepancy Report Type on page 2834

Discrepancy Report (Used for Searching)

The **Discrepancy Report** screen allows you to search for a discrepancy report using various search criteria. It also allows you to create a discrepancy report. It contains the following zone:

- Search Discrepancy Report on page 2842

Through this screen, you can navigate to the following screen:

- Discrepancy Report (Used for Viewing) on page 2848

Search Discrepancy Report

The **Search Discrepancy Report** zone allows you to search for a discrepancy report using various search criteria. It contains the following two sections:

Search Criteria - The **Search Criteria** section contains the following fields:

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Field Name	Field Description	Mandatory (Yes or No)
Search By	Used to indicate whether you want to search for a discrepancy report using the discrepancy or account details. The valid values are: • Discrepancy Details • Account Details **Note:** By default, the **Discrepancy Details** option is selected.	Yes
Discrepancy Report ID	Used to search for a particular discrepancy report. **Note:** This field appears when the **Discrepancy Details** option is selected from the **Search By** list.	No
Discrepancy Report Type	Used to search for discrepancy report which are created using a particular discrepancy report type. **Note:** This field appears when the **Discrepancy Details** option is selected from the **Search By** list. The list includes only those discrepancy report types which are already defined in the system.	No
Created From	Used to search for discrepancy reports that are created on or after the specified date. **Note:** This field appears when the **Discrepancy Details** option is selected from the **Search By** list. You can either manually specify the date or select it using the **Date Picker** ( ) icon corresponding to the field.	No
Status	Used to search for discrepancy reports with a particular status. The valid values are: • Completed • Deferred Processing • Draft • Pending **Note:** This field appears when the **Discrepancy Details** option is selected from the **Search By** list.	No
Created To	Used to search for discrepancy reports that are created on or before the specified date.	No

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Field Name	Field Description	Mandatory (Yes or No)
	Note: This field appears when the **Discrepancy Details** option is selected from the **Search By** list. You can either manually specify the date or select it using the **Date Picker** ( ) icon corresponding to the field.	
File Name	Used to search for discrepancy reports with a particular file name. **Note:** This field appears when the **Discrepancy Details** option is selected from the **Search By** list.	No
Person Name	Used to search for discrepancy reports with a particular person name. **Note:** This field appears when the **Account Details** option is selected from the **Search By** list.	No
Account Identifier Type	Used to specify the account identifier type based on which you want to search for discrepancy reports. **Note:** This field appears when the **Account Details** option is selected from the **Search By** list.	Yes (Conditional) **Note:** If you specify the account identifier as a search criteria, you have to select the account identifier type.
Account Identifier	Used to search for discrepancy reports belonging to a particular account identifier. **Note:** This field appears when the **Account Details** option is selected from the **Search By** list.	Yes (Conditional) **Note:** If you specify the account identifier type as a search criteria, you have to specify the account identifier.
Account ID	Used to search for discrepancy reports which are created for a particular account. **Note:** This field appears when the **Account Details** option is selected from the **Search By** list. The **Search** ( ) icon appears corresponding to the **Account ID** field. On clicking the **Search icon**, the **Account Search** window appears. On selecting the account, the respective information string appears corresponding to the **Account ID** field. It has a link. On clicking the link, the **Account** screen appears where you can view the details of the respective account.	No

Note: You must specify at least one search criterion while searching for a discrepancy report.

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Search Results - On clicking the **Search** button, the search results appear based on the specified search criteria. The **Search Results** section contains the following columns:

Column Name	Column Description
Creation Date/Time	Displays the date and time when the discrepancy report is created.
Discrepancy Report Information	Displays information about the discrepancy report. **Note:** It has a link. On clicking the link, the **Discrepancy Report** screen appears where you can view the details of the respective discrepancy report.
Status	Indicates the status of the discrepancy report. The valid values are: • Completed • Deferred Processing • Draft • Pending
Account ID	Displays the account ID of the person who created the discrepancy report. **Note:** It has a link. On clicking the link, the **Account** screen appears where you can view the details of the respective account.
File Name	Displays the file name provided (to the discrepancy report) when a discrepancy report is created at the file level.

Related Topics

For more information on...	See...
How to search for a discrepancy report	Searching for a Discrepancy Report on page 2845
How to view the details of a discrepancy report	Viewing the Discrepancy Report Details on page 2847
How to create a discrepancy report	Creating a Discrepancy Report on page 2846

Searching for a Discrepancy Report

Prerequisites

To search for a discrepancy report, you should have:

- Discrepancy report types and account identifier types defined in the application.
- Status defined in the application.

Procedure

To search for a discrepancy report:

1. Click the **Menu** link in the **Application** toolbar.
   A list appears.
2. From the **Main** menu, select **Accounting and Receivable** and then click **Discrepancy Report**.
   A sub-menu appears.
3. Click the **Search** option from the **Discrepancy Report** sub-menu.
   The **Discrepancy Report** screen appears.

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4. Enter the search criteria in the **Search Discrepancy Report** zone.

> **Note:** ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.

5. Click **Search**.
   A list of discrepancy reports that meet the search criteria appear in the **Search Results** section.

Related Topics

For more information on...	See...
Discrepancy Report screen	Discrepancy Report (Used for Searching) on page 2842
Search Discrepancy Report zone	Search Discrepancy Report on page 2842

Creating a Discrepancy Report

Prerequisites

To create a discrepancy report, you should have:

- Discrepancy report types defined in the application.
- Report levels defined in the application.

Procedure

To create a discrepancy report:

1. Click the **Menu** link in the **Application** toolbar.
   A list appears.
2. From the **Main** menu, select **Accounting and Receivable**and then click **Discrepancy Report**.
   A sub-menu appears.
3. Click the **Add** option from the **Discrepancy Report** sub-menu.
   The **Discrepancy Report** screen appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Discrepancy Report Type	Used to indicate the discrepancy report type using which you want to create the discrepancy report. **Note:** The list includes only those discrepancy report types which are already defined in the system.	Yes
Report Level	Used to specify the level at which the discrepancy report is created. The valid values are: • At Account Level • At File Level **Note:** The list includes only those values which are defined in the **C1_DISCRE_REPORT_LEVEL** lookup field.	Yes
Account ID	Used to specify an account ID when report level is selected as **At Account Level**.	Yes (Conditional)

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The **Search** (🔍) icon appears corresponding to the **Account ID** field. On clicking the **Search** icon, the **Account Search** window appears. On specifying the value for an account ID, the description of the account appears corresponding to the **Account ID** field.	**Note:** This field is required when the report level is selected as **At Account Level** while creating a discrepancy report.
File Name	Used to specify a name for the file when report level is selected as **At File Level**.	Yes (Conditional) **Note:** This field is required when the report level is selected as **At File Level** while creating a discrepancy report.

Tip: Alternatively, you can access the **Select Discrepancy Report Type** screen by clicking the **Add** button in the **Page Title** area of the **Discrepancy Report** screen.

4. Enter the required details.
5. Click **Save**.
   The **Discrepancy Report** is created.

Related Topics

For more information on...	See...
Discrepancy Report screen	Discrepancy Report (Used for Viewing) on page 2848
Discrepancy Line Items zone	Discrepancy Line Items on page 2850
Discrepancy Line Items Related Objects zone	Discrepancy Line Item Related Objects on page 2852
Discrepancy Line Item Characteristics zone	Discrepancy Line Items Characteristics Zone on page 2852

Viewing the Discrepancy Report Details

Procedure

To view the details of a discrepancy report:

1. Search for the discrepancy report in the **Discrepancy Report** screen.
2. In the **Search Results** section, click the link in the **Discrepancy Report Information** column corresponding *t*o the discrepancy report whose details you want to view.

   The **Discrepancy Report** screen appears. It contains the following tabs:

   - Discrepancy Report - Main on page 2848
   - Discrepancy Report - Log on page 2852
3. Ensure that the **Main** tab is selected.
4. View the details of the discrepancy report in the **Discrepancy Report** zone.

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5. View the discrepancy line items through the discrepancy report in the **Discrepancy Line Items** zone.

Related Topics

For more information on...	See...
How to search for a discrepancy report	Searching for a Discrepancy Report on page 2845
Discrepancy Report screen	Discrepancy Report (Used for Viewing) on page 2848
Discrepancy Report zone	Discrepancy Report - Main on page 2848
Discrepancy Line Items zone	Discrepancy Line Items on page 2850

Discrepancy Report (Used for Viewing)

Once the discrepancy reports are created, the **Discrepancy Report** screen allows you to:

- View the details of discrepancy report.
- Delete a discrepancy report
- Edit a discrepancy line item
- Finalize a discrepancy report
- View the log of a discrepancy report
- Add a log entry for a discrepancy report
- View the discrepancy line item related objects

This screen consists of the following tabs:

- Discrepancy Report - Main on page 2848
- Discrepancy Report - Log on page 2852

For more information on...	See...
How to view the details of discrepancy report	Viewing the Discrepancy Report Details on page 2847
How to delete a discrepancy report	Deleting a Discrepancy Report on page 2855
How to edit a discrepancy line item	Editing a Discrepancy Line Item on page 2853
How to finalize a discrepancy report	Finalizing a Discrepancy Report on page 2856
How to add a log entry for a discrepancy report	Adding a Log Entry for a Discrepancy Report on page 2857
How to view the log of a discrepancy report	Viewing the Log of a Discrepancy Report on page 2856
Discrepancy Line Item Related Objects zone	Discrepancy Line Item Related Objects on page 2852

Discrepancy Report - Main

The **Discrepancy Report - Main** tab displays information about the discrepancy report. It contains the following zones:

- Discrepancy Report on page 2849
- Discrepancy Line Items on page 2850
- Discrepancy Line Item Related Objects on page 2852
- Discrepancy Line Items Characteristics Zone on page 2852

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Discrepancy Report

The **Discrepancy Report** zone displays the details of the discrepancy report. It contains the following sections:

- **Main** - Displays basic information about the discrepancy report. It contains the following fields:

Field Name	Field Description
Discrepancy Report Information	Displays information about the discrepancy report.
Discrepancy Report Type	Indicates the discrepancy report type using which the discrepancy report is created. **Note:** It has a link. On clicking the link, the **Discrepancy Report Type** screen appears where you can view the details of the discrepancy report type.
File Name	Displays the file name for which the discrepancy report is generated. **Note:** This field appears when **At File Level** option is selected from the **Report Level** field while creating the discrepancy report.
Account Information	Displays the details of the account for which discrepancy report is generated. **Note:** This field appears when **At Account Level** option is selected from the **Report Level** field while creating the discrepancy report. It has a link. On clicking the link, the **Account** screen appears where you can view the details of the respective account.
Status	Indicates the status of the discrepancy report. The valid values are: • Completed • Deferred Processing • Draft • Pending

- **Record Actions** - Enables you to perform various actions on the discrepancy report. It contains the following buttons:

Button Name	Button Description
Delete	Used to delete the discrepancy report. **Note:** The **Delete** button appears when the discrepancy report is in the **Pending** status.
Finalize	Used to finalize all the changes and process the discrepancy report. **Note:** The **Finalize** button appears when the discrepancy report is in the **Pending** status. You cannot create more than one discrepancy report for a file or an account until you finalize the respective discrepancy report.

- **Record Information** - This section contains the following fields:

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Field Name	Field Description
Business Object	Indicates the business object using which the discrepancy report is created. In addition, a context menu (⊙) icon appears corresponding to this field which helps in navigating to other screens in the application. **Note:** It has a link. On clicking the link, the **Business Object** screen appears where you can view the details of the respective business object.
Status Date Time	Displays the date and time when the discrepancy report status is updated.
Creation Date/Time	Displays the date and time when the discrepancy report is created.

Related Topics

For more information on...	See...
How to delete a discrepancy report	Deleting a Discrepancy Report on page 2855
How to finalize a discrepancy report	Finalizing a Discrepancy Report on page 2856

Discrepancy Line Items

The **Discrepancy Line Items** zone displays the details of the discrepancy report. It contains the following columns:

Column Name	Column Description
Account ID	Indicates the account for which the discrepancy line item is created. **Note:** This column appears when the discrepancy report is generated for fully-insured group business.
Policy Number	Indicates the policy number. **Note:** This column appears when the discrepancy report is generated for fully-insured group business.
Plan Number	Indicates the plan number of the policy. **Note:** This column appears when the discrepancy report is generated for fully-insured group business.
Payor Identifier Type	Displays the payor identifier type. **Note:** This field appears when the discrepancy report is generated for the fully-insured individual business.
Payor Identifier	Displays the payor identifier. **Note:** This field appears when the discrepancy report is generated for the fully-insured individual business.
Subscriber Identifier Type	Displays the member identifier type.
Subscriber Identifier	Displays the value of the member identifier type.
Subscriber Name	Displays the name of the member to whom the discrepancy report belongs.

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Column Name	Column Description
Health Plan	Displays information about the health plan. **Note:** This field appears when you generate discrepancy report for fully-insured individual business.
HIOS ID	Displays the Health Insurance Oversight System (HIOS) ID. **Note:** This field appears when you generate discrepancy report for fully-insured individual business.
Coverage Start Date	Displays the date from when the coverage starts.
Coverage End Date	Displays the date till when the coverage ends.
Payment Type	Displays the type of tender through which the payment is made. **Note:** This field appears when you generate discrepancy report for fully-insured individual business.
Billed Amount	Displays the bill segment amount.
Paid Amount	Displays the paid amount of the bill.
Discrepancy Amount	Displays the discrepancy amount.
Discrepancy Category	Displays the discrepancy category.
Consumer Status	Displays the status of the consumer for its existence in the application.
Comments	Displays the comments, added for the discrepancy line items.
Edit	On clicking the **Edit** (✎) icon, the **Discrepancy Line Item** screen appears where you can edit the details of the discrepancy line item. **Note:** The **Edit** icon appears when the discrepancy report is in **Pending** or **Draft** status.

Note:

On clicking the **Broadcast** (📡) icon corresponding to the discrepancy line item, the **Discrepancy Line Item Related Objects** and **Discrepancy Line Item Characteristics** zones appear.

You can filter the discrepancy line items using various search criteria available in the **Filter** area. By default, the **Filter** area is hidden. You can view the **Filter** area by clicking the **Filters** (▽) icon in the upper right corner of the **Discrepancy Line Items** zone.

Pagination is used to display limited number of records in the **Search Results** section. You can change the number of records displayed per page, if required. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

Related Topics

For more information on...	See...
How to view the details of discrepancy report	Viewing the Discrepancy Report Details on page 2847
How to edit the details of discrepancy line items	Editing a Discrepancy Line Item on page 2853

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Discrepancy Line Item Related Objects

The **Discrepancy Line Item Related Objects** zone lists the related objects for the discrepancy line item. It contains the following columns:

Column Name	Column Description
Related Object Type	Displays **Financial Transaction** or **Member Pay Instruction** as the related object type.
Related Object Information	Displays brief information about the related object type.
	Note: It has a link. On clicking the link, the **Pay Instruction** or **Financial Transaction** screen appears with the details of the respective related object depending on the related object type.

By default, the **Discrepancy Line Item Related Objects** zone does not appear in the **Discrepancy Report** screen. It appears when you click the **Broadcast** (📡) icon corresponding to the discrepancy line item in the **Discrepancy Line Items** zone.

Pagination is used to display limited number of records in the **Search Results** section. You can change the number of records displayed per page, if required. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

Related Topics

For more information on...	See...
Discrepancy Report screen	Discrepancy Report (Used for Viewing) on page 2848
Discrepancy Line Items zone	Discrepancy Line Items on page 2850

Discrepancy Line Items Characteristics Zone

Note: At present the **Discrepancy Line Item Characteristics** cannot be added. The Discrepancy Line Items Characteristics zone will be fully functional in the future release.

Related Topics

For more information on...	See...
How to view the details of discrepancy report	Viewing the Discrepancy Report Details on page 2847
How to edit the details of discrepancy line items	Editing a Discrepancy Line Item on page 2853

Discrepancy Report - Log

The **Discrepancy Report - Log** tab contains the following zone:

- Discrepancy Report Log on page 2852

Discrepancy Report Log

The **Discrepancy Report Log** zone lists the complete trail of actions performed on the discrepancy report. It contains the following columns:

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Column Name	Column Description
Creation Date/Time	Displays the date and time when the action was performed on the discrepancy report.
Details	Displays the details about the action performed on the discrepancy report.
User	Indicates the user who has performed the action on the discrepancy report.
Log Type	Indicates the type of log.
Related Object	Indicates the object or entity which is created when the action is performed on the discrepancy report.
	Note: At present, no data appears in this column. The implementation team can build the custom logic to meet the business requirements.
Status Reason	Indicates the reason of the action performed on the discrepancy report object.

Note: You can manually add a log entry for the discrepancy report by clicking the **Add Log Entry** link in the upper right corner of the **Discrepancy Report Log** zone.

Related Topics

For more information on...	See...
How to view the log of the discrepancy report	Viewing the Log of a Discrepancy Report on page 2856
How to add a log entry for a discrepancy report	Adding a Log Entry for a Reconciliation on page 2823

Editing a Discrepancy Line Item

Prerequisites

To edit a discrepancy line item, you should have:

- Discrepancy category defined in the application.

Procedure

To edit a discrepancy line item:

1. Search for the discrepancy report in the **Discrepancy Report** screen.
2. In the **Search Results** section, click the link in the **Discrepancy Report Information** column corresponding *t*o the discrepancy report, whose details you want to edit.

   The **Discrepancy Report Information** screen appears.
3. Ensure that the **Main** tab is selected.
4. In the **Discrepancy Line Items** zone, click the **Edit** (✎) icon in the **Edit** column corresponding *t*o the discrepancy line item whose details you want to edit.
   The **Discrepancy Line Item** screen appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Discrepancy Report ID	Displays the discrepancy report ID.	Not applicable
Account ID	Indicates the account for which the discrepancy line item is created.	Not applicable

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Field Name	Field Description	Mandatory (Yes or No)
Policy Number	Indicates the policy number.	Not applicable
Plan Number	Indicates the plan number of the policy.	Not applicable
Payor Identifier Type	Displays the payor identifier type. **Note:** This field appears when you generate discrepancy report for fully-insured individual business.	Not applicable
Payor Identifier	Displays the payor identifier. **Note:** This field appears when you generate discrepancy report for fully-insured individual business.	Not applicable
Health Plan	Displays information about the health plan. **Note:** This field appears when you generate discrepancy report for fully-insured individual business.	Not applicable
HIOS ID	Displays the Health Insurance Oversight System (HIOS) ID. **Note:** This field appears when you generate discrepancy report for fully-insured individual business.	Not applicable
Payment Type	Displays the type of tender through which the payment is made. **Note:** This field appears when you generate discrepancy report for fully-insured individual business.	Not applicable
Subscriber Identifier Type	Displays the member identifier type.	Not applicable
Subscriber Identifier	Displays the value of the member identifier.	Not applicable
Subscriber Name	Displays the name of the member to whom the discrepancy report belongs.	Not applicable
Coverage Start Date	Displays the date from when the coverage starts.	Not applicable
Coverage End Date	Displays the date till when the coverage ends.	Not applicable
Billed Amount	Displays the billed amount when the bill was generated.	Not applicable
Paid Amount	Displays the amount which is already paid against the entity.	Not applicable
Discrepancy Amount	Displays the amount that highlights the discrepancy.	Not applicable
Discrepancy Category	Used to specify the discrepancy category.	No

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The list includes only those values which are defined in the **DSC_CAT_FLG** lookup field.	
Comments	Used to specify additional details about the discrepancy line item. **Note:** You can resize the text box depending on your requirement by clicking the **Resize Handle** ( ) icon at the bottom right corner of the text box.	No

Note: The **Edit** icon appears when the discrepancy line item is in the **Pending** or **Draft** status.

5. Modify the required details for the discrepancy line item.
6. Click **Save**.
   The changes made to the discrepancy line item are saved.

Related Topics

For more information on...	See...
How to view the details of discrepancy report	Viewing the Discrepancy Report Details on page 2847
Discrepancy Report screen	Discrepancy Report (Used for Viewing) on page 2848
Discrepancy Report zone	Discrepancy Report on page 2849

Deleting a Discrepancy Report

Procedure

To delete a discrepancy report:

1. Search for the discrepancy report in the **Discrepancy Report** screen.
2. In the **Search Results** section, click the link in the **Discrepancy Report Information** column corresponding *t*o the discrepancy report that you want to delete.

   The **Discrepancy Report** screen appears.
3. Ensure that the **Main** tab is selected.
4. Click the **Delete** button in the **Discrepancy Report** zone.
   A message appears confirming whether you want to delete the discrepancy report.

Note: The **Delete** button appears when the discrepancy report is in the **Pending** or **Draft** status.

5. Click **OK**.
   The discrepancy report is deleted.

Related Topics

For more information on...	See...
How to search for a discrepancy report	Searching for a Discrepancy Report on page 2845
Discrepancy Report screen	Discrepancy Report (Used for Viewing) on page 2848

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For more information on...	See...
Discrepancy Report zone	Discrepancy Report on page 2849

Finalizing a Discrepancy Report

Procedure

To finalize a discrepancy report:

1. Search for the discrepancy report in the **Discrepancy Report** screen.
2. In the **Search Results** section, click the link in the **Discrepancy Report Information** column corresponding *t*o the discrepancy report that you want to finalize.
   The **Discrepancy Report** screen appears.
3. Ensure that the **Main** tab is selected.
4. Click the **Finalize** button in the **Discrepancy Report** zone.
   The status of the discrepancy report is changed to **Completed**.

Note: The **Finalize** button appears when the discrepancy report is in the **Pending** status.

Related Topics

For more information on...	See...
How to search for a discrepancy report	Searching for a Discrepancy Report on page 2845
Discrepancy Report screen	Discrepancy Report (Used for Viewing) on page 2848
Discrepancy Report zone	Discrepancy Report on page 2849

Viewing the Log of a Discrepancy Report

Procedure

To view the log of a discrepancy report:

1. Search for the discrepancy report in the **Discrepancy Report** screen.
2. In the **Search Results** section, click the link in the **Discrepancy Report Information** column corresponding *t*o the discrepancy report whose details you want to view.

   The **Discrepancy Report** screen appears.
3. Click the **Log** tab.
   The **Log** tab appears.
4. View the complete trail of actions performed on the discrepancy report in the **Discrepancy Report Log** zone.

Related Topics

For more information on...	See...
How to search for a discrepancy report	Searching for a Discrepancy Report on page 2845
Discrepancy Report screen	Discrepancy Report (Used for Viewing) on page 2848
Discrepancy Report Log zone	Discrepancy Report Log on page 2852

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For more information on...	See...
How to add a log entry for a discrepancy report	Adding a Log Entry for a Discrepancy Report on page 2857

Adding a Log Entry for a Discrepancy Report

Procedure

To add a log entry for a discrepancy report:

1. Search for the discrepancy report in the **Discrepancy Report** screen.
2. In the **Search Results** section, click the link in the **Discrepancy Report Information** column corresponding *t*o the discrepancy report for which you want to add a log entry.
   The **Discrepancy Report** screen appears.
3. Click the **Log** tab.
   The **Log** tab appears.
4. Click the **Add Log Entry** link in the upper right corner of the **Discrepancy Report Log** zone.

   The **Add Discrepancy Report Log** window appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Discrepancy Report Information	Displays information about the discrepancy report.	Not applicable
Log Details	Used to specify additional comments for the discrepancy report. **Note:** You can resize the text box depending on your requirement by clicking the **Resize Handle** ( ) icon at the bottom right corner of the text box.	Yes

5. Enter the comments in the **Log Details** field.
6. Click **Save**.
   The log entry is added in the **Discrepancy Report Log** zone.

Related Topics

For more information on...	See...
How to search for a discrepancy report	Searching for a Discrepancy Report on page 2845
Discrepancy Report screen	Discrepancy Report (Used for Viewing) on page 2848
Discrepancy Report Log zone	Discrepancy Report Log on page 2852

Member Reconciliation Preference

Oracle Revenue Management and Billing enables you to reconcile all pay instructions of a file at the member level through a batch named **C1-RCPM**. While executing the **C1-RCPM** batch, you need to specify a member reconciliation preference whose attributes you want to use while reconciling all pay instructions of a file at the member level. For more information about the batch, see *Oracle Revenue Management and Billing Batch Guide*.

A member reconciliation preference consists of the following attributes:

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- Payment Event Characteristic Type
- Pay Instruction Completed Status
- Reconciliation Matching Level Characteristic Type
- Pay Instruction Open Status
- Reconciliation Open Status

For more information about these attributes, see Defining a Member Reconciliation Preference on page 2859. You can define, edit, delete, and copy a member reconciliation preference through the **Field Mapping** screen.

Searching for a Member Reconciliation Preference

Prerequisites

To search for a member reconciliation preference, you should have:

- Values defined in the **FIELD_CAT_FLG** lookup field

Procedure

To search for a member reconciliation preference:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **F** and then click **Field Mapping**.
   A sub-menu appears.
3. Click the **Search** option from the **Field Mapping** sub-menu.
   The **Field Mapping** screen appears.
4. Select the **Member Reconciliation** option from the **Preference Category** list.
5. Enter the additional search criteria in the **Search Field Mapping** zone.

   Note: ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.
6. Click **Search**.
   A list of member reconciliation preferences that meet the search criteria appears in the **Search Results** section.

Viewing the Member Reconciliation Preference Details

Procedure

To view the details of a member reconciliation preference:

1. Search for the member reconciliation preference in the **Field Mapping** screen.
2. In the **Search Results** section, click the **Broadcast** (⦾) icon corresponding to the member reconciliation preference whose details you want to view.
   The **Field Mapping** zone appears.
3. View the details of the member reconciliation preference in the **Field Mapping** zone.

Related Topics

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For more information on...	See...
How to search for a member reconciliation preference	Searching for a Member Reconciliation Preference on page 2858

Defining a Member Reconciliation Preference

Prerequisites

To define a member reconciliation preference, you should have:

- Required characteristic types defined in the application
- Required statuses defined in the lifecycle of the **C1-MemberReconciliation** and **C1-PayInstruction** business objects
- Values defined in the **MAP_ENTITY_FLG** lookup field

Procedure

To define a member reconciliation preference:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **F** and then click **Field Mapping**.
   A sub-menu appears.
3. Click the **Add** option from the **Field Mapping** sub-menu.

   The **Select Business Object** screen appears. It contains the following field:

Field Name	Field Description	Mandatory (Yes or No)
Field Mapping Business Object	Used to indicate the business object using which you want to create the member reconciliation preference. The valid values are: • Field Mapping • Medicare Plan Benefit Package • Membership Status Reason Mapping	Yes

Note: Alternatively, you can access the **Select Business Object** screen by clicking the **Add** button in the **Page Title** area of the **Field Mapping** screen.

4. Select the **Field Mapping** option from the **Field Mapping Business Object** list.
5. Click **OK**.

   The **Field Mapping** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details of the member reconciliation preference. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Preference	Used to specify the member reconciliation preference.	Yes
Description	Used to specify the description for the member reconciliation preference.	Yes
Detailed Description	Used to specify additional information about the member reconciliation preference.	No
Status	Used to indicate the status of the member reconciliation preference. The valid values are:	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	• Active • Inactive	

- **Preference Category** - This section contains the following field:

Field Name	Field Description	Mandatory (Yes or No)
Preference Category	Used to indicate the category to which the preference belongs. The valid values are: • Billing • Binder Payment • Geographic Rating Area • Individual Membership • Medicare • Medicare Plan Benefit • Member Reconciliation • Member Relationship and Subscription Tier • Membership Status Reason • Statement Construct	Yes

- **Preference Settings** - Used to set the attributes in the member reconciliation preference. It contains the following fields in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Attribute	Used to indicate the attribute which you want to set in the member reconciliation preference. The valid values are: • **Payment Event Characteristic Type** - Used when a pay instruction is reconciled at the member level through the **C1-RCPM** batch. • **Pay Instruction Completed Status** - Used when a pay instruction is fully reconciled at the member level through the **C1-RCPM** batch. • **Reconciliation Matching Level Characteristic Type** - Used when reconciliation is created for a pay instruction file where all pay instructions have member data. • **Pay Instruction Open Status** - Used when a pay instruction is not fully reconciled at the member level through the **C1-RCPM** batch. • **Reconciliation Open Status** - Used when one or more pay instructions of a file are not yet fully reconciled at the member level through the **C1-RCPM** batch.	Yes (Conditional) **Note:** This field is required while setting an attribute in the member reconciliation preference.
Value	Used to specify the attribute value. The attribute value that you can specify varies depending on the attribute you want to set in the member reconciliation preference. The valid values are: • **Payment Event Characteristic Type** - The **Value** field is used to specify the characteristic type where you can store the payment event ID. This type of characteristic is defined for the reconciliation adjustments. It indicates the payment event whose payment is distributed	Yes (Conditional) **Note:** This field is required while setting an attribute in the member reconciliation preference.

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Field Name	Field Description	Mandatory (Yes or No)
	against the bill segment. Here, you must specify a characteristic type where the characteristic entity is set to **Adjustment**. **Note:** The **C1PAYEVT** characteristic type is shipped with the product. • **Pay Instruction Completed Status** - The **Value** field is used to specify the status code to which you want to transition the pay instruction when it is fully reconciled. **Note:** Here, you must specify the status code which is already defined in the lifecycle of the **C1-PayInstruction** business object. • **Reconciliation Matching Level Characteristic Type** - The **Value** field is used to specify the characteristic type which indicates all pay instructions in the file must be reconciled at the member level. This type of characteristic is defined for the reconciliation when all pay instructions in a file have member data. Here, you must specify a characteristic type where the characteristic entity is set to **Member Reconciliation**. **Note:** The **C1-MTLVL** characteristic type is shipped with the product. • **Pay Instruction Open Status** - The **Value** field is used to specify the status code to which you want to transition the pay instruction when it is not fully reconciled. **Note:** Here, you must specify the status code which is already defined in the lifecycle of the **C1-PayInstruction** business object. • **Reconciliation Open Status** - The **Value** field is used to specify the status code to which you want to transition the reconciliation when the status of the pay instruction is changed to **Open**. **Note:** Here, you must specify the status code which is already defined in the lifecycle of the **C1-MemberReconciliation** business object.	
Entity Type	Used to indicate the type of entity for which the attribute is applicable. The valid values are: • Account • Billable Charge **Note:** At present, this data is stored for informational purposes only and is not considered in the business logic. If required, you can add more entity types to the **MAP_ENTITY_FLG** lookup field.	No

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> **Note:** While defining a member reconciliation preference, you must set at least one attribute in the member reconciliation preference.

6. Select the **Member Reconciliation** option from the **Preference Category** list.
7. Enter the required details in the **Main** section.
8. Select the required attribute and value from the respective fields.
9. If you want to set more than one attribute in the member reconciliation preference, click the **Add** (+) icon and then repeat step 8.

> **Note:** However, if you want to remove an attribute from the member reconciliation preference, click the **Delete** ( ) icon corresponding to the attribute.

10. Click **Save**.
    The member reconciliation preference is defined.

Editing a Member Reconciliation Preference

Prerequisites

To edit a member reconciliation preference, you should have:

- Required characteristic types defined in the application
- Required statuses defined in the lifecycle of the **C1-MemberReconciliation** and **C1-PayInstruction** business objects
- Values defined in the **MAP_ENTITY_FLG** lookup field

Procedure

To edit a member reconciliation preference:

1. Search for the member reconciliation preference in the **Field Mapping** screen.
2. In the **Search Results** section, click the **Edit** ( ) icon in the **Edit** column corresponding to the member reconciliation preference whose details you want to edit.

   The **Field Mapping** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details of the member reconciliation preference. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Preference	Displays the member reconciliation preference.	Not applicable
Description	Used to specify the description for the member reconciliation preference.	Yes
Detailed Description	Used to specify additional information about the member reconciliation preference.	No
Status	Used to indicate the status of the member reconciliation preference. The valid values are: • Active • Inactive	Yes
Preference Category	Indicates the category to which the preference belongs. The valid value is: • Member Reconciliation	Not applicable

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- **Preference Settings** - Used to set the attributes in the member reconciliation preference. It contains the following fields in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Attribute	Used to indicate the attribute which you want to set in the member reconciliation preference. The valid values are: • **Payment Event Characteristic Type** - Used when a pay instruction is reconciled at the member level through the **C1-RCPM** batch. • **Pay Instruction Completed Status** - Used when a pay instruction is fully reconciled at the member level through the **C1-RCPM** batch. • **Reconciliation Matching Level Characteristic Type** - Used when reconciliation is created for a pay instruction file where all pay instructions have member data. • **Pay Instruction Open Status** - Used when a pay instruction is not fully reconciled at the member level through the **C1-RCPM** batch. • **Reconciliation Open Status** - Used when one or more pay instructions of a file are not yet fully reconciled at the member level through the **C1-RCPM** batch.	Yes (Conditional) **Note:** This field is required while setting an attribute in the member reconciliation preference.
Value	Used to specify the attribute value. The attribute value that you can specify varies depending on the attribute you want to set in the member reconciliation preference. The valid values are: • **Payment Event Characteristic Type** - The **Value** field is used to specify the characteristic type where you can store the payment event ID. This type of characteristic is defined for the reconciliation adjustments. It indicates the payment event whose payment is distributed against the bill segment. Here, you must specify a characteristic type where the characteristic entity is set to **Adjustment**. **Note:** The **C1PAYEVT** characteristic type is shipped with the product. • **Pay Instruction Completed Status** - The **Value** field is used to specify the status code to which you want to transition the pay instruction when it is fully reconciled. **Note:** Here, you must specify the status code which is already defined in the lifecycle of the **C1-PayInstruction** business object. • **Reconciliation Matching Level Characteristic Type** - The **Value** field is used to specify the characteristic type which indicates all pay instructions in the file must be reconciled at the member level. This type of characteristic is defined for the reconciliation when all pay instructions in a file have member data. Here, you must specify a characteristic type where the characteristic entity is set to **Member Reconciliation**.	Yes (Conditional) **Note:** This field is required while setting an attribute in the member reconciliation preference.

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The **C1-MTLVL** characteristic type is shipped with the product. • **Pay Instruction Open Status** - The **Value** field is used to specify the status code to which you want to transition the pay instruction when it is not fully reconciled. **Note:** Here, you must specify the status code which is already defined in the lifecycle of the **C1-PayInstruction** business object. • **Reconciliation Open Status** - The **Value** field is used to specify the status code to which you want to transition the reconciliation when the status of the pay instruction is changed to **Open**. **Note:** Here, you must specify the status code which is already defined in the lifecycle of the **C1-MemberReconciliation** business object.	
Entity Type	Used to indicate the type of entity for which the attribute is applicable. The valid values are: • Account • Billable Charge **Note:** At present, this data is stored for informational purposes only and is not considered in the business logic. If required, you can add more entity types to the **MAP_ENTITY_FLG** lookup field.	No

Tip: Alternatively, you can edit the details of a member reconciliation preference by clicking the **Edit** button in the **Field Mapping** zone.

3. Modify the required details in the **Main** section.
4. Define, edit, or remove the attribute from the member reconciliation preference, if required.

Note: You must set at least one attribute in a member reconciliation preference.

5. Click **Save**.
   The changes made to the member reconciliation preference are saved.

Related Topics

For more information on...	See...
How to search for a member reconciliation preference	Searching for a Member Reconciliation Preference on page 2858

Copying a Member Reconciliation Preference

Instead of creating a member reconciliation preference from scratch, you can create a new member reconciliation preference using an existing member reconciliation preference. This is possible through copying a member reconciliation

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preference. On copying a member reconciliation preference, the details including the attributes are copied to the new member reconciliation preference. You can then edit the details, if required.

Prerequisites

To copy a member reconciliation preference, you should have:

- Member reconciliation preference (whose copy you want to create) defined in the application
- Required characteristic types defined in the application
- Required statuses defined in the lifecycle of the **C1-MemberReconciliation** and **C1-PayInstruction** business objects
- Values defined in the **MAP_ENTITY_FLG** lookup field

Procedure

To copy a member reconciliation preference:

1. Search for the member reconciliation preference in the **Field Mapping** screen.
2. In the **Search Results** section, click the **Duplicate** (⧉) icon in the **Duplicate** column *c*orresponding to the member reconciliation preference whose copy you want to create.

   The **Field Mapping** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details of the member reconciliation preference. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Preference	Used to specify the member reconciliation preference.	Yes
Description	Used to specify the description for the member reconciliation preference.	Yes
Detailed Description	Used to specify additional information about the member reconciliation preference.	No
Status	Used to indicate the status of the member reconciliation preference. The valid values are: • Active • Inactive	Yes
Preference Category	Indicates the category to which the preference belongs. The valid value is: • Member Reconciliation	Not applicable

   - **Preference Settings** - Used to set the attributes in the member reconciliation preference. It contains the following fields in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Attribute	Used to indicate the attribute which you want to set in the member reconciliation preference. The valid values are: • **Payment Event Characteristic Type** - Used when a pay instruction is reconciled at the member level through the **C1-RCPM** batch. • **Pay Instruction Completed Status** - Used when a pay instruction is fully reconciled at the member level through the **C1-RCPM** batch. • **Reconciliation Matching Level Characteristic Type** - Used when reconciliation is created for a	Yes (Conditional) **Note:** This field is required while setting an attribute in the member reconciliation preference.

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Field Name	Field Description	Mandatory (Yes or No)
	pay instruction file where all pay instructions have member data. • **Pay Instruction Open Status** - Used when a pay instruction is not fully reconciled at the member level through the **C1-RCPM** batch. • **Reconciliation Open Status** - Used when one or more pay instructions of a file are not yet fully reconciled at the member level through the **C1-RCPM** batch.	
Value	Used to specify the attribute value. The attribute value that you can specify varies depending on the attribute you want to set in the member reconciliation preference. The valid values are: • **Payment Event Characteristic Type** - The **Value** field is used to specify the characteristic type where you can store the payment event ID. This type of characteristic is defined for the reconciliation adjustments. It indicates the payment event whose payment is distributed against the bill segment. Here, you must specify a characteristic type where the characteristic entity is set to **Adjustment**. **Note:** The **C1PAYEVT** characteristic type is shipped with the product. • **Pay Instruction Completed Status** - The **Value** field is used to specify the status code to which you want to transition the pay instruction when it is fully reconciled. **Note:** Here, you must specify the status code which is already defined in the lifecycle of the **C1-PayInstruction** business object. • **Reconciliation Matching Level Characteristic Type** - The **Value** field is used to specify the characteristic type which indicates all pay instructions in the file must be reconciled at the member level. This type of characteristic is defined for the reconciliation when all pay instructions in a file have member data. Here, you must specify a characteristic type where the characteristic entity is set to **Member Reconciliation**. **Note:** The **C1-MTLVL** characteristic type is shipped with the product. • **Pay Instruction Open Status** - The **Value** field is used to specify the status code to which you want to transition the pay instruction when it is not fully reconciled. **Note:** Here, you must specify the status code which is already defined in the lifecycle of the **C1-PayInstruction** business object.	Yes (Conditional) **Note:** This field is required while setting an attribute in the member reconciliation preference.

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Field Name	Field Description	Mandatory (Yes or No)
	• **Reconciliation Open Status** - The **Value** field is used to specify the status code to which you want to transition the reconciliation when the status of the pay instruction is changed to **Open**. **Note:** Here, you must specify the status code which is already defined in the lifecycle of the **C1-MemberReconciliation** business object.	
Entity Type	Used to indicate the type of entity for which the attribute is applicable. The valid values are: • Account • Billable Charge **Note:** At present, this data is stored for informational purposes only and is not considered in the business logic. If required, you can add more entity types to the **MAP_ENTITY_FLG** lookup field.	No

Note: While defining a member reconciliation preference, you must set at least one attribute in the member reconciliation preference.

Tip: Alternatively, you can copy a member reconciliation preference by clicking the **Duplicate** button in the **Field Mapping** zone.

3. Enter the required details in the **Main** section.
4. Define, edit, or remove the attribute from the member reconciliation preference, if required.
5. Click **Save**.
   The new member reconciliation preference is defined.

Related Topics

For more information on...	See...
How to search for a member reconciliation preference	Searching for a Member Reconciliation Preference on page 2858

Deleting a Member Reconciliation Preference

Procedure

To delete a member reconciliation preference:

1. Search for the member reconciliation preference in the **Field Mapping** screen.
2. In the **Search Results** section, click the **Delete** (🗑) icon in the **Delete** column corresponding to the member reconciliation preference that you want to delete.
   A message appears confirming whether you want to delete the member reconciliation preference.

Tip: Alternatively, you can delete a member reconciliation preference by clicking the **Delete** button in the **Field Mapping** zone.

3. Click **OK**.
   The member reconciliation preference is deleted.

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Related Topics

For more information on...	See...
How to search for a member reconciliation preference	Searching for a Member Reconciliation Preference on page 2858

Chapter 36

Self-Funded Pricing

Topics:

- Prerequisites
- Approval Workflow for the Self-Funded Pricing Rules
- Write-Off Charges during Post Runout
- Line Item Extendable Lookup
- Extendable Lookup (Line Item)
- Claim Template Extendable Lookup
- Extendable Lookup (Claim Template)
- Rate Option Extendable Lookup
- Extendable Lookup (Rate Option)
- Rate Type Extendable Lookup
- Extendable Lookup (Rate Type)
- Pricing Group
- Pricing Rule Type
- Claim Pricing
- Specific Stop-Loss (SSL) Pricing
- Aggregate Stop-Loss (ASL) Pricing
- Retention Type Claim Based Pricing
- Retention Type Enrollment Based Pricing
- Flat Fee Pricing
- Ancillary Pricing
- Discount Pricing
- Level Funding Pricing
- Minimum Premium Program
- Self-Funded Pricing Rule Versioning
- Retention Type Enrollment Tier Based Pricing

Oracle Revenue Management and Billing introduces a new pricing model for the self-funded health insurance business. In this pricing model, you can define pricing rules using a pricing rule type. You can define the following pricing rule types in ORMB:

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

Prerequisites

To setup the self-funded pricing feature, you need to do the following:

- Define values for claim template extendable lookup
- Define values for rate option extendable lookup
- Define values for line item extendable lookup
- Setup the **C1-ASOBLLNG** feature configuration
- Define price items for the pricing rules
- Define parameters for the pricing rules
- Associate parameters to the price items for the pricing rules

Related Topics

For more information on...	See...
How to setup the **C1-ASOBLLNG** feature configuration	Setting the C1-ASOBLLNG Feature Configuration on page 4417

Approval Workflow for the Self-Funded Pricing Rules

Oracle Revenue Management and Billing enables you to configure the approval workflow process for the claim, specific stop-loss, aggregate stop-loss, retention type claim based, retention type enrollment based, flat fees, ancillary, discount, or level funded pricing rules. The following approval workflow groups are shipped with the product:

Approval Workflow Group	Description
C1PRCRLCLM	Claim Pricing Rule
C1PRCSSL	Specific Stop-Loss Pricing Rule
C1PRCASL	Aggregate Stop-Loss Pricing Rule
C1PRETCLM	Retention Type Claim Based Pricing Rule
C1PRRETENR	Retention Type Enrollment Based Pricing Rule
C1PRFLTFEE	Flat Fees Pricing Rule
C1PRCANC	Ancillary Pricing Rule
C1PRCDA	Discount Arrangement Pricing Rule
C1PRCLVLFN	Level Funded Pricing Rule

To enable the approval workflow process for the pricing rules, you need to do the following:

1. Create the required approval workflow chains, approval workflow criterion types, approval workflow group chain linkages, and approval workflow reasons.

   Note: The **Field Level Approval** feature is not supported for the self-funded pricing rules. Therefore, you should not define field approval rule criteria while creating the approval workflow group chain linkage for the above listed approval workflow groups.
2. Define the approval workflow settings for the respective approval workflow group and set the **Active** field to **Yes**.
3. Ensure that the following value is set in the respective option type of the **C1-ASOBLLNG** feature configuration:

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Option Type	Value
Approval Workflow Group for Claim	C1PRCRLCLM
Approval Workflow Group for SSL	C1PRCSSL
Approval Workflow Group for ASL	C1PRCASL
Approval Workflow Group for Retention Type Claim Based	C1PRETCLM
Approval Workflow Group for Retention Type Enrollment Based	C1PRRETENR
Approval Workflow Group for Flat Fees	C1PRFLTFEE
Approval Workflow Group for Ancillary	C1PRCANC
Approval Workflow Group for Discount Arrangement	C1PRCDA
Approval Workflow Group for Level Funded	C1PRCLVLFN

Once the approval workflow process is enabled for the pricing rules of a particular category (for example, Claim), the system creates an approval transaction whenever you define, edit, or delete a pricing rule of the respective category (i.e. whenever you define, edit, or delete a claim pricing rule). You can view the approval transactions which are created while defining, editing, and deleting the parent customer's and bill groups' pricing rules in the **Pricing Rule Approval Transactions** zone of the **Customer 360° Information** screen. On clicking the link in the **Approval Transaction ID** column corresponding to an approval transaction, the **Comparison: New versus Existing** screen appears. It allows the approver to review the pricing rule and accordingly approve, reject, or cancel the approval transaction.

Tip: Alternatively, you can review the approval transaction and take appropriate action from the **Approval Transaction** screen.

Related Topics

For more information on...	See...
How to setup the **C1-ASOBLLNG** feature configuration	Setting the C1-ASOBLLNG Feature Configuration on page 4417

Write-Off Charges during Post Runout

Oracle Revenue Management and Billing enables you to write-off the claim, specific stop-loss, aggregate stop-loss, claim based fees, enrollment based fees, ancillary, discount, and funds charges when the bill is generated in the post runout period of the policy. In this case, a write-off adjustment is created against the respective bill segment during the post bill completion. The write-off adjustment is created using the post runout write-off adjustment type which is specified in the respective pricing rule type.

To enable this feature, you need to do the following:

1. Set the **Eligible for Write-Off in Post Runout** field in the respective pricing rule type to **Yes**.
2. Specify the post runout write-off adjustment type in the respective pricing rule type.
3. Attach the **C1-PRCRLWOFF** algorithm to the **Post-Bill Completion** system event in the customer class of the accounts for which you want to write-off the charges in the post runout period of the policy.

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Line Item Extendable Lookup

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

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

For example, the following table illustrates few line items which are applicable to different pricing rule type categories:

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

The CDH and THC line items can be included in a claim template. They can also be considered while calculating specific and aggregate stop-loss. The CDH and PCC line items can be considered while defining pricing arrangements in an ancillary pricing rule type. In addition, any charge received for the CDH and THC line items in a claim transaction will be written off when these line items are not eligible for billing.

The **C1-ExtLookPricingRuleLineItem** extendable lookup is redesigned to:

- Specify a billable charge line type using which the calculation line should be created for a rate type when the system calculates the fees separately for each applicable claim charge
- Specify a billable charge line type using which the calculation line should be created for a rate type when the system calculates the minimum and maximum markup or markdown separately for each eligible claim charge
- Specify a billable charge line type using which the calculation line should be created for a rate type when the system calculates the minimum and maximum amount for a line item

Once you derive the pricing information from a claim pricing rule in a specific stop-loss pricing rule, you need to specify whether the additional fee (if any) is eligible for specific stop-loss. If so, it is considered for calculating specific stop-loss.

Once you derive the pricing information from a claim pricing rule in an aggregate stop-loss pricing rule, you need to specify whether the additional fee (if any) is eligible for aggregate stop-loss. If so, it is considered for calculating aggregate stop-loss.

Once you derive the pricing information from a claim pricing rule in a level-funded pricing rule, you need to specify whether the additional fee (if any) should be settled through level funding. If so, it is considered while accumulating level funded charges.

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Until now, when the **Include In Settlement** column was selected corresponding to a line item in a level funded pricing rule, the system settled the charge as well as its markup or markdown through level funding. However, now, the system provides two different options - one which helps to determine whether the charge should be settled through level funding and another which helps to determine whether the corresponding markup or markdown should be settled through level funding.

The **Extendable Lookup Query** screen allows you to search for an extendable lookup. It contains the following zone:

- Extendable Lookup Search on page 2873

Extendable Lookup Search

The **Extendable Lookup Search** zone allows you to search for an extendable lookup. It contains the following two sections:

- **Search Criteria** - The **Search Criteria** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Business Object	Used to search a particular extendable lookup business object.	No
Description	Used to search extendable lookups with a particular description.	No

Note: You must specify at least one search criterion while searching for an extendable lookup.

- **Search Results** - On clicking the **Search** button, the search results appear based on the specified search criteria. The **Search Results** section contains the following columns:

Column Name	Column Description
Business Object	Displays the extendable lookup business object.
Description	Displays the description of the extendable lookup business object.
	Note: It has a link. On clicking the link, the **Extendable Lookup** screen appears where you can view the details of the respective extendable lookup.

Related Topics

For more information on...	See...
How to search for the **Line Item** extendable lookup	Searching for the Line Item Extendable Lookup on page 2873
How to view the values of the **Line Item** extendable lookup	Viewing the Values of the Line Item Extendable Lookup on page 2874

Searching for the Line Item Extendable Lookup

Procedure

To search for the **Line Item** extendable lookup:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **E** and then click **Extendable Lookup**.

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The **Extendable Lookup Query** screen appears.

3. In the **Extendable Lookup Search** zone, enter **C1-ExtLookPricingRuleLineItem** in the **Business Object** field.

> **Note:** ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.

4. Click **Search**.
   The **Line Item** extendable lookup business object appears in the **Search Results** section.

Related Topics

For more information on...	See...
Extendable Lookup Query screen	Line Item Extendable Lookup on page 2872
Extendable Lookup Search zone	Extendable Lookup Search on page 2873

Viewing the Values of the Line Item Extendable Lookup

Procedure

To view the values of the **Line Item** extendable lookup:

1. Search for the **Line Item** extendable lookup in the **Extendable Lookup Query** screen.
2. In the **Search Results** section, click the link in the **Description** column corresponding to the extendable lookup business object whose details you want to view.
   The **Extendable Lookup** screen appears.
3. View the values of the **Line Item** extendable lookup in the **Extendable Lookup Value List** zone.

Related Topics

For more information on...	See...
How to search for the **Line Item** extendable lookup	Searching for the Line Item Extendable Lookup on page 2873
Extendable Lookup screen	Extendable Lookup (Line Item) on page 2874
Extendable Lookup Value List zone	Extendable Lookup Value List on page 2875

Extendable Lookup (Line Item)

The **Extendable Lookup** screen allows you to view the values of the **Line Item (C1-ExtLookPricingRuleLineItem)** extendable lookup. It also allows you to define, edit, copy, and delete a line item. It contains the following zones:

- Extendable Lookup Value List on page 2875
- Extendable Lookup Value on page 2875

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Extendable Lookup Value List

The **Extendable Lookup Value List** zone lists the values which are already defined for the **Line Item** extendable lookup. It contains the following columns:

Column Name	Column Description
Value	Displays the line item.
Description	Displays the description of the line item.
Owner	Indicates who has created the line item. The valid values are: • Base • Customer Modification • Framework
Edit	On clicking the **Edit** (✎) icon, the **Line Item** screen appears where you can edit the details of the line item.
Duplicate	On clicking the **Duplicate** (⧉) icon, the **Line Item** screen appears where you can define a new line item using an existing line item.
Delete	On clicking the **Delete** (🗑) icon, you can delete the line item.
	Note: You can delete a line item when it is not yet used in the claim template or while defining the self-funded pricing.
Detailed Description	Displays additional information about the line item.

Note: Pagination is used to display limited number of records in this zone. You can use the navigation buttons, such as **Previous** and **Next** to navigate between pages.

On clicking the **Broadcast** (📡) icon corresponding to a line item, the **Extendable Lookup Value** zone appears with the details of the respective line item.

You can filter the list using various search criteria (such as, **Value** and **Description**) available in the **Filter** area. By default, the **Filter** area is hidden. You can view the **Filter** area by clicking the **Filters** (▽) icon in the upper right corner of this zone.

Related Topics

For more information on...	See...
How to edit a line item	Editing a Line Item on page 2885
How to copy a line item	Copying a Line Item on page 2887
How to delete a line item	Deleting a Line Item on page 2889
How to view the details of a line item	Viewing the Line Item Details on page 2890

Extendable Lookup Value

The **Extendable Lookup Value** zone displays the details of the line item. It contains the following sections:

- **Main** - Displays basic information about the line item. It contains the following fields:

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Field Name	Field Description
Line Item	Indicates the charge for which the line item is created.
Description	Displays the description of the line item.
Override Description	Displays the overridden description of the line item.
Detailed Description	Displays additional information about the line item.
Status	Indicates the status of the line item. The valid values are: • Active • Inactive
Service Quantity Identifier	Indicates the service quantity identifier associated with the line item.
Billable Charge Line Type	Indicates the billable charge line type using which the calculation line is created for the charge (i.e. line item).
Write Off Billable Charge Line Type	Indicates the billable charge line type using which the write off calculation line is created for the charge (i.e. line item).
Write Off, if Not Eligible for Billing	Indicates whether the system should write off the charge (i.e. line item) when it is not eligible for billing. The valid values are: • Yes • No
Retention Claim Based Percentage Calculation	Indicates whether the charge (i.e. line item) should be considered while calculating the percentage based retention type claim based fee. The valid values are: • Yes • No

- **Line Item Usage** - Indicates the pricing rule type categories to which the line item is associated. It contains the following column in a grid:

Column Name	Column Description
Pricing Rule Type Category	Indicates the pricing rule type category which is associated with the charge (i.e. line item). The valid values are: • Aggregate Stop-Loss • Ancillary • Claim • Retention Type Claim Based • Specific Stop-Loss

- **Markup or Markdown Billing Information** - Indicates the markup or markdown billing information defined for the line items. It contains the following columns in a grid:

Column Name	Column Description
Rate Type	Indicates the minimum and maximum markup or markdown billing information defined using the rate type.
Billable Charge Line Type	Indicates the billable charge line type using which the calculation line is created for a rate type when the system calculates the minimum and maximum markup or markdown separately for each eligible claim charge.

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- **Line Item Billing Information** - Indicates the rate type and billable charge line type to which the line item is associated. It contains the following columns in a grid:

Column Name	Column Description
Rate Type	Indicates the rate type defined for the line item.
Billable Charge Line Type	Indicates the billable charge line type billable charge line type using which the calculation line is created for a rate type when the system calculates the minimum and maximum amount for a line item.

- **Claim Handling Fees Billing Information** - Indicates the claim handling fees billing information. It contains the following columns in a grid:

Column Name	Column Description
Fee Type	Indicates the type of charge applicable on the line items.
Fee	Indicates the fee defined for the line items.
Rate	Indicates the rate and billable charge line type defined for the line items. **Column Name** / **Column Description** Rate Type – Indicates the rate type defined for a line item. Billable Charge Line Type – Indicates the billable charge line type using which the calculation line is created for a rate type when the system calculates the fees separately for each applicable claim charge.

- **Record Actions** - This section contains the following buttons:

Button Name	Button Description
Edit	Used to edit the details of the line item.
Delete	Used to delete the line item. **Note:** You can delete a line item when it is not yet used in the claim template or while defining the self-funded pricing.
Duplicate	Used to create a new line item using an existing line item.

- **Record Information** - This section contains the following fields:

Field Name	Field Description
Business Object	Indicates the extendable lookup business object using which the line item is created. In addition, a context menu appears corresponding to this field which helps in navigating to other screens in the application. **Note:** It has a link. On clicking the link, the **Business Object** screen appears where you can view the details of the respective business object.
Owner	Indicates who has created the line item. The valid values are: • Framework • Base • Customer Modification

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By default, the **Extendable Lookup Value** zone does not appear in the **Extendable Lookup** screen. It appears when you click the **Broadcast** (📡) icon corresponding to the line item in the **Extendable Lookup Value List** zone.

Related Topics

For more information on...	See...
How to edit a line item	Editing a Line Item on page 2885
How to copy a line item	Copying a Line Item on page 2887
How to delete a line item	Deleting a Line Item on page 2889
How to view the details of a line item	Viewing the Line Item Details on page 2890

Defining a Line Item

Prerequisites

To define a line item, you should have:

- Service quantity identifiers and billable charge line types defined in the application

Procedure

To define a line item:

1. Search for the **Line Item** extendable lookup in the **Extendable Lookup Query** screen.
2. In the **Search Results** section, click the link in the **Description** column corresponding to the *e*xtendable lookup business object whose details you want to view.
   The **Extendable Lookup** screen appears.
3. Click the **Add** button in the **Page Title** area of the **Extendable Lookup** screen.

   The **Line Item** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details about the line item.
   - **Line Item Usage** - Used to associate the line item with one or more pricing rule type categories.
   - **Markup or Markdown Billing Information** - Used to define the markup or markdown billing information for the line items.
   - **Line Item Billing Information** - Used to define line item billing information for the line items.
   - **Claim Handling Fees Billing Information** - Used to define the claim handling fees billing information for the line items.

   The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Line Item	Used to specify the charge (for example, consumer-driven amount, traditional health insurance amount, and so on) for which the line item is created.	Yes
Description	Used to specify the description for the line item.	Yes
Override Description	Used when you want to override the description of the line item.	No
Detailed Description	Used to specify additional information about the line item.	No
Status	Used to indicate the status of the line item. The valid values are:	No

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Field Name	Field Description	Mandatory (Yes or No)
	• Active • Inactive **Note:** By default, the value is set to **Active**.	
Service Quantity Identifier	Used to indicate the service quantity identifier (SQI) for the line item. The SQI indicates the transaction field in which the charge amount is stored. It is also used while calculating the percentage based markup or markdown for the line item.	Yes
Billable Charge Line Type	Used to indicate the billable charge line type using which you want to create the calculation line for the charge (i.e. line item). **Note:** The **Search** (🔍) icon appears corresponding to the **Billable Charge Line Type Search** field. On clicking the **Search** icon, the **Billable Charge Line Type Search** window appears. On specifying the billable charge line type, the description of the billable charge line type appears corresponding to the **Billable Charge Line Type** field.	No
Write Off Billable Charge Line Type	Used to indicate the billable charge line type using which you want to create the write off calculation line for the charge (i.e. line item). **Note:** The **Search** (🔍) icon appears corresponding to the **Write Off Billable Charge Line Type** field. On clicking the **Search** icon, the **Billable Charge Line Type Search** window appears. On specifying the billable charge line type, the description of the billable charge line type appears corresponding to the **Write Off Billable Charge Line Type** field.	Yes (Conditional) **Note:** This field is required when the **Write Off, if Not Eligible for Billing** field is set to **Yes**.
Write Off, if Not Eligible for Billing	Used to indicate whether the system should write off the charge (i.e. line item) when it is not eligible for billing. The valid values are: • Yes • No **Note:** By default, the value is set to **No**.	No
Retention Claim Based Percentage Calculation	Used to indicate whether the charge (i.e. line item) should be considered while calculating the percentage based retention type claim based fee. The valid values are: • Yes • No	No

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Field Name	Field Description	Mandatory (Yes or No)
	Note: By default, the value is set to **No**.	

4. Enter the required details in the **Main** section.
5. Associate the line item with one or more pricing rule type categories.
6. Define the markup or markdown billing information for the line items.
7. Define line item billing information for the line items.
8. Define the claim handling fees billing information for the line items.
9. Click **Save**.
   The line item is added in the **C1-ExtLookPricingRuleLineItem** extendable lookup.

Related Topics

For more information on...	See...
How to search for the **Line Item** extendable lookup	Searching for the Line Item Extendable Lookup on page 2873
Extendable Lookup screen	Extendable Lookup (Line Item) on page 2874
How to associate a line item with a pricing rule type category	Associating a Line Item with a Pricing Rule Type Category on page 2880
How to define the markup or markdown billing information for the line item	Defining the Markup or Markdown Billing Information for the Line Items on page 2881
How to define line item billing information for the line item	Defining Line Item Billing Information for the Line Items on page 2882
How to define the claim handling fees billing information for the line item	Defining the Claim Handling Fees Billing Information for the Line Items on page 2883

Associating a Line Item with a Pricing Rule Type Category

Procedure

To associate a line item with a pricing rule type category:

1. Ensure that the **Line Item Usage** section is expanded when you are defining, editing, or copying a line item.

   The **Line Item Usage** section contains the following field in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Pricing Rule Type Category	Used to indicate the pricing rule type category which you want to associate with the charge (i.e. line item). The valid values are: • Aggregate Stop-Loss • Ancillary • Claim • Retention Type Claim Based • Specific Stop-Loss The following table describes the significance of each category that can be associated with the line item:	Yes (Conditional) **Note:** This field is required when you are associating the line item with a pricing rule type category.

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<table>
<tr><th>Field Name</th><th>Field Description</th><th>Mandatory (Yes or No)</th></tr>
<tr><td></td><td>
<table>
<tr><th>Pricing Rule Type Category</th><th>Significance</th></tr>
<tr><td>Claim</td><td>Whether the line item can be included in a claim template and thereby while defining a claim pricing rule for a parent customer and bill group.</td></tr>
<tr><td>Specific Stop-Loss</td><td>Whether the line item can be considered while calculating specific stop-loss.</td></tr>
<tr><td>Aggregate Stop-Loss</td><td>Whether the line item can be considered while calculating aggregate stop-loss.</td></tr>
<tr><td>Retention Type Claim Based</td><td>Whether the line item can be used while calculating the percentage based retention type claim based fee.</td></tr>
<tr><td>Ancillary</td><td>Whether the line item can be considered while defining pricing arrangements in an ancillary pricing rule type.</td></tr>
</table>

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

2. Enter the required details in the **Line Item Usage** section.
3. If you want to associate the line item with more than one pricing rule type category, click the **Add** (+) icon and *t*hen repeat step 3.

Note: However, if you want to remove a pricing rule type category from the line item, click the **Delete** (🗑) icon corresponding to the pricing rule type category.

4. Click **Save**.
   The line item is associated with the pricing rule type category.

Related Topics

For more information on...	See...
How to define a line item	Defining a Line Item on page 2878
How to edit a line item	Editing a Line Item on page 2885
How to copy a line item	Copying a Line Item on page 2887

Defining the Markup or Markdown Billing Information for the Line Items

Procedure

To define the markup or markdown billing information for the line items:

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1. Ensure that the **Markup or Markdown Billing Information** section is expanded when you are defining, editing, or copying a line item.

   The **Markup or Markdown Billing Information** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Rate Type	Used to indicate the rate type.	Yes (Conditional) **Note:** This field is required when you select a billable charge line type from the **Billable Charge Line Type** field.
Billable Charge Line Type	Used to specify the billable charge line type. **Note:** On clicking the **Search** (🔍) icon, the **Billable Charge Line Type Search** window appears. On specifying the billable charge line type, the description of the billable charge line type appears corresponding to the **Billable Charge Line Type** field.	Yes (Conditional) **Note:** This field is required when you select an option from the **Rate Type** field.

2. Enter the required details in the **Markup or Markdown Billing Information** section.
3. If you want to add more than one markup or markdown billing information for the line item, click the **Add** (+) icon and then repeat step 2.

   Note: However, if you want to remove a markup or markdown billing information from the line item, click the **Delete** (🗑) icon corresponding to the line item.

4. Click **Save**.
   The markup or markdown billing information is defined for the line items.

Related Topics

For more information on...	See...
How to define a line item	Defining a Line Item on page 2878
How to edit a line item	Copying a Line Item on page 2887
How to copy a line item	Editing a Line Item on page 2885

Defining Line Item Billing Information for the Line Items

Procedure

To define the line item billing information for the line items:

1. Ensure that the **Line Item Billing Information** section is expanded when you are defining, editing, or copying a line item.

   The **Line Item Billing Information** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Rate Type	Used to indicate the rate type.	Yes (Conditional)

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Field Name	Field Description	Mandatory (Yes or No)
		Note: This field is required when you select a billable charge line type from the **Billable Charge Line Type** field.
Billable Charge Line Type	Used to specify the billable charge line type.	Yes (Conditional)
	Note: On clicking the **Search** (🔍) icon, the **Billable Charge Line Type Search** window appears. On specifying the billable charge line type, the description of the billable charge line type appears corresponding to the **Billable Charge Line Type** field.	**Note:** This field is required when you select an option from the **Rate Type** field.

2. Enter the required details in the **Line Item Billing Information** section.
3. If you want to add more than one line item billing information for the line item, click the **Add** (+) icon and *t*hen repeat step 2.

Note: However, if you want to remove a line item billing information from the line item, click the **Delete** (🗑) icon corresponding to the line item.

4. Click **Save**.
   The line item billing information is defined for the line items.

Related Topics

For more information on...	See...
How to define a line item	Defining a Line Item on page 2878
How to edit a line item	Copying a Line Item on page 2887
How to copy a line item	Editing a Line Item on page 2885

Defining the Claim Handling Fees Billing Information for the Line Items

Procedure

To define the claim handling fees billing information for the line items:

1. Ensure that the **Claim Handling Fees Billing Information** section is expanded *w*hen you are defining, editing, or copying a line item.

   The **Claim Handling Fees Billing Information** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Fee Type	Used to indicate the type of charge applicable on the line items.	Yes (Conditional)
		Note: This field is required when fee is selected from the **Fee** field.

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Field Name	Field Description	Mandatory (Yes or No)
Fee	Used to indicate the fee defined for the line items.	Yes (Conditional) **Note:** This field is required when fee type is selected from the **Fee Type** field.
Rate	Used to indicate the rate and billable charge line type for the line items. **Field Name** / **Field Description** / **Mandatory (Yes or No)** Rate Type — Used to indicate the rate type. — Yes (Conditional) **Note:** This field is required when you select a billable charge line type from the **Billable Charge Line Type** field. Billable Charge Line Type — Used to specify the billable charge line type. — Yes (Conditional) **Note:** This field is required when you select an option from the **Rate Type** field. **Note:** On clicking the **Search** (🔍) icon, the **Billable Charge Line Type Search** window appears. On specifying the billable charge line type, the description of the billable charge line type appears corresponding to the **Billable Charge Line Type** field.	Yes

2. Enter the required details in the **Claim Handling Fees Billing Information** section.
3. If you want to add more than one claim handling fee billing information for the line item, click the **Add** (+) icon and *t*hen repeat step 2.

Note: However, if you want to remove a claim handling fee billing information from the line item, click the **Delete** (🗑) icon corresponding to the line item.

4. If you want to add more than one rate for the line item, click the **Add** (+) icon and *t*hen repeat step 2.

Note: However, if you want to remove a rate from the line item, click the **Delete** (🗑) icon corresponding to the line item.

5. Click **Save**.
   The claim handling fees billing information is defined for the line items.

Related Topics

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For more information on...	See...
How to define a line item	Defining a Line Item on page 2878
How to edit a line item	Copying a Line Item on page 2887
How to copy a line item	Editing a Line Item on page 2885

Editing a Line Item

Prerequisites

To edit a line item, you should have:

- Service quantity identifiers and billable charge line types defined in the application

Procedure

To edit a line item:

1. Search for the **Line Item** extendable lookup in the **Extendable Lookup Query** screen.
2. In the **Search Results** section, click the link in the **Description** column corresponding to the *e*xtendable lookup business object whose details you want to view.
   The **Extendable Lookup** screen appears.
3. In the **Extendable Lookup Value List** zone, click the **Edit** (✎) icon in the **Edit** column corresponding to the line item whose details you want to edit.

   The **Line Item** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details about the line item.
   - **Line Item Usage** - Used to associate the line item with one or more pricing rule type categories.
   - **Markup or Markdown Billing Information** - Used to define the markup and markdown billing information for the line item.
   - **Line Item Billing Information** - Used to define the line item billing information for the line item.
   - **Claim Handling Fees Billing Information** - Used to define the claim handling fees billing information for the line item.

   The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Line Item	Indicates the charge (for example, consumer-driven amount, traditional health insurance amount, and so on) for which the line item is created.	Not applicable
Description	Used to specify the description for the line item.	Yes
Override Description	Used when you want to override the description of the line item.	No
Detailed Description	Used to specify additional information about the line item.	No
Status	Used to indicate the status of the line item. The valid values are: • Active • Inactive	Yes
Service Quantity Identifier	Used to indicate the service quantity identifier (SQI) for the line item. The SQI indicates the transaction field in which the charge amount is stored. It is also used while calculating the percentage based markup or markdown for the line item.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
Billable Charge Line Type	Used to indicate the billable charge line type using which you want to create the calculation line for the charge (i.e. line item). **Note:** The **Search** (🔍) icon appears corresponding to the **Billable Charge Line Type Search** field. On clicking the **Search** icon, the **Billable Charge Line Type Search** window appears. On specifying the billable charge line type, the description of the billable charge line type appears corresponding to the **Billable Charge Line Type** field.	Yes
Write Off Billable Charge Line Type	Used to indicate the billable charge line type using which you want to create the write off calculation line for the charge (i.e. line item). **Note:** The **Search** (🔍) icon appears corresponding to the **Write Off Billable Charge Line Type** field. On clicking the **Search** icon, the **Billable Charge Line Type Search** window appears. On specifying the billable charge line type, the description of the billable charge line type appears corresponding to the **Write Off Billable Charge Line Type** field.	Yes (Conditional) **Note:** This field is required when the **Write Off, if Not Eligible for Billing** field is set to **Yes**.
Write Off, if Not Eligible for Billing	Used to indicate whether the system should write off the charge (i.e. line item) when it is not eligible for billing. The valid values are: • Yes • No	No
Retention Claim Based Percentage Calculation	Used to indicate whether the charge (i.e. line item) should be considered while calculating the percentage based retention type claim based fee. The valid values are: • Yes • No	No

Tip: Alternatively, you can edit the details of a line item by clicking the **Edit** button in the **Extendable Lookup Value** zone.

4. Modify the required details in the **Main** section.
5. Associate or remove a pricing rule type category from the line item, if required.
6. Modify the markup or markdown billing information for the line items, if required.
7. Add, edit, or remove the line item billing information for the line items, if required.
8. Add, edit, or remove the claim handling fees billing information for the line items, if required.
9. Click **Save**.
   The changes made to the line item are saved.

Related Topics

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For more information on...	See...
How to search for the **Line Item** extendable lookup	Searching for the Line Item Extendable Lookup on page 2873
Extendable Lookup screen	Extendable Lookup (Line Item) on page 2874
Extendable Lookup Value List zone	Extendable Lookup Value List on page 2875
Extendable Lookup Value zone	Extendable Lookup Value on page 2875
How to associate a line item with a pricing rule type category	Associating a Line Item with a Pricing Rule Type Category on page 2880
How to define the markup or markdown billing information for the line item	Defining the Markup or Markdown Billing Information for the Line Items on page 2881
How to define the line item billing information for the line item	Defining Line Item Billing Information for the Line Items on page 2882
How to define the claim handling fees billing information for the line item	Defining the Claim Handling Fees Billing Information for the Line Items on page 2883

Copying a Line Item

Instead of creating a line item from scratch, you can create a new line item using an existing line item. This is possible through copying a line item. On copying a line item, the details including the pricing rule type categories to which the line item is associated are copied to the new line item. You can then edit the details, if required.

Prerequisites

To copy a line item, you should have:

- Line item (whose copy you want to create) defined in the application
- Service quantity identifiers and billable charge line types defined in the application

Procedure

To copy a line item:

1. Search for the **Line Item** extendable lookup in the **Extendable Lookup Query** screen.
2. In the **Search Results** section, click the link in the **Description** column corresponding to the *e*xtendable lookup business object whose details you want to view.
   The **Extendable Lookup** screen appears.
3. In the **Extendable Lookup Value List** zone, click the **Duplicate** (⧉) icon in the **Duplicate** column corresponding to the line item whose copy you want to create.

   The **Line Item** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details about the line item.
   - **Line Item Usage** - Used to associate the line item with one or more pricing rule type categories.
   - **Markup or Markdown Billing Information** - Used to define the markup or markdown billing information for the line item.
   - **Line Item Billing Information** - Used to define the line item billing information for the line item.
   - **Claim Handling Fees Billing Information** - Used to define the claim handling fees billing information for the line item.

   The **Main** section contains the following fields:

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Field Name	Field Description	Mandatory (Yes or No)
Line Item	Used to specify the charge (for example, consumer-driven amount, traditional health insurance amount, and so on) for which the line item is created.	Yes
Description	Used to specify the description for the line item.	Yes
Override Description	Used when you want to override the description of the line item.	No
Detailed Description	Used to specify additional information about the line item.	No
Status	Used to indicate the status of the line item. The valid values are: • Active • Inactive	Yes
Service Quantity Identifier	Used to indicate the service quantity identifier (SQI) for the line item. The SQI indicates the transaction field in which the charge amount is stored. It is also used while calculating the percentage based markup or markdown for the line item.	Yes
Billable Charge Line Type	Used to indicate the billable charge line type using which you want to create the calculation line for the charge (i.e. line item). **Note:** The **Search** (🔍) icon appears corresponding to the **Billable Charge Line Type Search** field. On clicking the **Search** icon, the **Billable Charge Line Type Search** window appears. On specifying the billable charge line type, the description of the billable charge line type appears corresponding to the **Billable Charge Line Type** field.	Yes
Write Off Billable Charge Line Type	Used to indicate the billable charge line type using which you want to create the write off calculation line for the charge (i.e. line item). **Note:** The **Search** (🔍) icon appears corresponding to the **Write Off Billable Charge Line Type** field. On clicking the **Search** icon, the **Billable Charge Line Type Search** window appears. On specifying the billable charge line type, the description of the billable charge line type appears corresponding to the **Write Off Billable Charge Line Type** field.	Yes (Conditional) **Note:** This field is required when the **Write Off, if Not Eligible for Billing** field is set to **Yes**.
Write Off, if Not Eligible for Billing	Used to indicate whether the system should write off the charge (i.e. line item) when it is not eligible for billing. The valid values are: • Yes • No	No

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Field Name	Field Description	Mandatory (Yes or No)
Retention Claim Based Percentage Calculation	Used to indicate whether the charge (i.e. line item) should be considered while calculating the percentage based retention type claim based fee. The valid values are: • Yes • No	No

Tip: Alternatively, you can copy a line item by clicking the **Duplicate** button in the **Extendable Lookup Value** zone.

4. Enter the required details in the **Main** section.
5. Associate or remove a pricing rule type category from the line item, if required.
6. Modify the markup or markdown billing information for the line items, if required.
7. Add, edit, or remove the line item billing information for the line items, if required.
8. Add, edit, or remove the claim handling fees billing information for the line items, if required.
9. Click **Save**.
   The new line item is added in the **C1-ExtLookPricingRuleLineItem** extendable lookup.

Related Topics

For more information on...	See...
How to search for the **Line Item** extendable lookup	Searching for the Line Item Extendable Lookup on page 2873
Extendable Lookup screen	Extendable Lookup (Line Item) on page 2874
Extendable Lookup Value List zone	Extendable Lookup Value List on page 2875
Extendable Lookup Value zone	Extendable Lookup Value on page 2875
How to associate a line item with a pricing rule type category	Associating a Line Item with a Pricing Rule Type Category on page 2880
How to define the markup or markdown billing information for the line item	Defining the Markup or Markdown Billing Information for the Line Items on page 2881
How to define line item billing information for the line item	Defining Line Item Billing Information for the Line Items on page 2882
How to define the claim handling fees billing information for the line item	Defining the Claim Handling Fees Billing Information for the Line Items on page 2883

Deleting a Line Item

Procedure

To delete a line item:

1. Search for the **Line Item** extendable lookup in the **Extendable Lookup Query** screen.
2. In the **Search Results** section, click the link in the **Description** column corresponding *to* the extendable lookup business object whose details you want to view.
   The **Extendable Lookup** screen appears.
3. In the **Extendable Lookup Value List** zone, click the **Delete** (🗑) icon in the **Delete** column corresponding *to* the line item that you want to delete.
   A message appears confirming whether you want to delete the line item.

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> **Note:** You can delete a line item when it is not yet used in the claim template or while defining the Administrative Services Only (ASO) pricing.

> **Tip:** Alternatively, you can delete a line item by clicking the **Delete** button in the **Extendable Lookup Value** zone.

4. Click **OK**.
   The line item is deleted from the **C1-ExtLookPricingRuleLineItem** extendable lookup.

Related Topics

For more information on...	See...
How to search for the **Line Item** extendable lookup	Searching for the Line Item Extendable Lookup on page 2873
Extendable Lookup screen	Extendable Lookup (Line Item) on page 2874
Extendable Lookup Value List zone	Extendable Lookup Value List on page 2875
Extendable Lookup Value zone	Extendable Lookup Value on page 2875

Viewing the Line Item Details

Procedure

To view the details of a line item:

1. Search for the **Line Item** extendable lookup in the **Extendable Lookup Query** screen.
2. In the **Search Results** section, click the link in the **Description** column corresponding to the *e*xtendable lookup business object whose details you want to view.
   The **Extendable Lookup** screen appears.
3. In the **Extendable Lookup Value List** zone, click the **Broadcast** (ᯤ) icon corresponding to the line item whose details you want to view.
   The **Extendable Lookup Value** zone appears.
4. View the details of the line item in the **Extendable Lookup Value** zone.

Related Topics

For more information on...	See...
How to search for the **Line Item** extendable lookup	Searching for the Line Item Extendable Lookup on page 2873
Extendable Lookup screen	Extendable Lookup (Line Item) on page 2874
Extendable Lookup Value List zone	Extendable Lookup Value List on page 2875
Extendable Lookup Value zone	Extendable Lookup Value on page 2875

Claim Template Extendable Lookup

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

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claim template must be defined in the system using the **Claim Template (C1-ExtLookClaimTemplate)** extendable lookup. A claim template encapsulates the following information:

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

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

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

For example, the following table illustrates few claim templates with different line items:

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

The **Extendable Lookup Query** screen allows you to search for an extendable lookup. It contains the following zone:

- Extendable Lookup Search on page 2891

Extendable Lookup Search

The **Extendable Lookup Search** zone allows you to search for an extendable lookup. It contains the following two sections:

- **Search Criteria** - The **Search Criteria** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Business Object	Used to search a particular extendable lookup business object.	No

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Field Name	Field Description	Mandatory (Yes or No)
Description	Used to search extendable lookups with a particular description.	No

Note: You must specify at least one search criterion while searching for an extendable lookup.

- **Search Results** - On clicking the **Search** button, the search results appear based on the specified search criteria. The **Search Results** section contains the following columns:

Column Name	Column Description
Business Object	Displays the extendable lookup business object.
Description	Displays the description of the extendable lookup business object. **Note:** It has a link. On clicking the link, the **Extendable Lookup** screen appears where you can view the details of the respective extendable lookup.

Related Topics

For more information on...	See...
How to search for the **Claim Template** extendable lookup	Searching for the Claim Template Extendable Lookup on page 2892
How to view the values of **Claim Template** extendable lookup	Viewing the Values of the Claim Template Extendable Lookup on page 2893

Searching for the Claim Template Extendable Lookup

Procedure

To search for the **Claim Template** extendable lookup:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **E** and then click **Extendable Lookup**.
   The **Extendable Lookup Query** screen appears.
3. In the **Extendable Lookup Search** zone, enter **C1-ExtLookClaimTemplate** in the **Business Object** field.

   Note: ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.
4. Click **Search**.
   The **Claim Template** extendable lookup business object appears in the **Search Results** section.

Related Topics

For more information on...	See...
Extendable Lookup Query screen	Claim Template Extendable Lookup on page 2890
Extendable Lookup Search zone	Extendable Lookup Search on page 2891

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Viewing the Values of the Claim Template Extendable Lookup

Procedure

To view the values of the **Claim Template** extendable lookup:

1. Search for the **Claim Template** extendable lookup in the **Extendable Lookup Query** screen.
2. In the **Search Results** section, click the link in the **Description** column corresponding to the *e*xtendable lookup business object whose details you want to view.
   The **Extendable Lookup** screen appears.
3. View the values of the **Claim Template** extendable lookup in the **Extendable Lookup Value List** zone.

Related Topics

For more information on...	See...
How to search for the **Claim Template** extendable lookup	Searching for the Claim Template Extendable Lookup on page 2892
Extendable Lookup screen	Extendable Lookup (Claim Template) on page 2893
Extendable Lookup Value List zone	Extendable Lookup Value List on page 2893

Extendable Lookup (Claim Template)

The **Extendable Lookup** screen allows you to view the values of the **Claim Template (C1-ExtLookClaimTemplate)** extendable lookup. It also allows you to define, edit, copy, and delete a claim template. It contains the following zones:

- Extendable Lookup Value List on page 2893
- Extendable Lookup Value on page 2894

Extendable Lookup Value List

The **Extendable Lookup Value List** zone lists the values which are already defined for the **Claim Template** extendable lookup. It contains the following columns:

Column Name	Column Description
Value	Displays the claim template.
Description	Displays the description of the claim template.
Owner	Indicates who has created the claim template. The valid values are: • Framework • Base • Customer Modification
Edit	On clicking the **Edit** (✎) icon, the **Claim Template** screen appears where you can edit the details of the claim template.
Duplicate	On clicking the **Duplicate** (⧉) icon, the **Claim Template** screen appears where you can define a new claim template using an existing claim template.
Delete	On clicking the **Delete** (🗑) icon, you can delete the claim template.

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Column Name	Column Description
	Note: You can delete a claim template when it is not yet used in a claim pricing rule type.
Detailed Description	Displays additional information about the claim template.

Note: Pagination is used to display limited number of records in this zone. You can use the navigation buttons, such as **Previous** and **Next** to navigate between pages.

On clicking the **Broadcast** (📡) icon corresponding to a claim template, the **Extendable Lookup Value** zone appears with the details of the respective claim template.

You can filter the list using various search criteria (such as, **Value** and **Description**) available in the **Filter** area. By default, the **Filter** area is hidden. You can view the **Filter** area by clicking the **Filters** (▽) icon in the upper right corner of this zone.

Related Topics

For more information on...	See...
How to edit a claim template	Editing a Claim Template on page 2904
How to copy a claim template	Copying a Claim Template on page 2906
How to delete a claim template	Deleting a Claim Template on page 2907
How to view the details of a claim template	Viewing the Claim Template Details on page 2908

Extendable Lookup Value

The **Extendable Lookup Value** zone displays the details of the claim template. It contains the following sections:

- **Main** - Displays basic information about the claim template. It contains the following fields:

Field Name	Field Description
Claim Template	Displays the claim template.
Description	Displays the description of the claim template.
Override Description	Displays the overridden description of the claim template.
Detailed Description	Displays additional information about the claim template.
Status	Indicates the status of the claim template. The valid values are: • Active • Inactive

- **Claim Template Usage** - Indicates when the claim template can be used while defining a claim pricing rule for a policy of a bill group. It contains the following field:

Field Name	Field Description
Policy Status	Indicates whether the claim template should be used while defining a claim pricing rule for a policy which is in the **In Force/Active**, **Post Runout**, or **Runout** status. The valid values are: • In Force/Active • Post Runout

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Field Name	Field Description
	• Runout

- **Claim Handling Fees** - Indicates the claim handling fees which are applicable to one ore more line items in the claim template. It contains the following columns:

Column Name	Column Description
Show Line Items in Pricing Rule	Indicates that claim line item appears when you are defining or editing a claim pricing rule.
Fee Type	Indicates the type of charge applicable on the line items.
Fee	Indicates the fee defined for the line items.
Fee Significance	Indicates the purpose of the imposing the claim handling fees on the line items.
Fee Applicability	Indicates the fee applicability on which the claim handling fees are defined.
Rating Information	Indicates the rate type and value that you want to use while defining the rating information for the line items. **Column Name** / **Column Description** Editable – Indicates that rate type and rate value fields are editable while defining or editing the claim handling fees for the line items. Rate Type – Indicates the rate type that you want to use while defining or editing the claim handling fees for the line items. Rate – Displays the rate that you want to use while defining or editing the claim handling fees for the line items.

- **Default Markup or Markdown Values** - Indicates the default markup or markdown values defined for the line items in the claim template. It contains the following fields:

Field Name	Field Description
Pricing Strategy	Indicates whether you want to markup or markdown the line items. The valid values are: • Markup • Markdown • None
Markup or Markdown Type	Indicates whether you want a flat or percentage based markup or markdown on the line items. The valid values are: • Flat Amount • Percentage **Note:** This field appears when the **Markup** or **Markdown** option is selected from the **Pricing Strategy** list.
Markup or Markdown Amount	Displays the default flat markup or markdown amount for the line items. **Note:** This field appears when the **Flat Amount** option is selected from the **Markup or Markdown Type** list.

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Field Name	Field Description
Markup or Markdown Percentage	Displays the default percentage of markup or markdown for all line items. **Note:** This field appears when the **Percentage** option is selected from the **Markup or Markdown Type** list.
Editable	Indicates that rate type and rate value fields are editable while defining or editing the markup or markdown values for the line items.
Rate Type	Displays minimum and maximum markup or markdown defined using the rate type.
Rate	Displays the rate for minimum and maximum markup or markdown defined using the rate type.

- **Line Items** - Lists the line items which are added in the claim template. It contains the following columns:

Column Name	Column Description
Sequence	Indicates the order in which the calculation line should be generated for the line item.
Line Item	Indicate the line item which is added in the claim template.
Billing Eligibility	Indicates whether the line item is eligible for billing. The valid values are: • Eligible • Not Eligible • Rule Based • Used Defined (Default No) • User Defined (Default Yes)
Rule Type	Indicates that rules of the specified rule type should be executed to determine whether the line item is eligible for billing. **Note:** The data appears in this column when the **Rule Based** option is selected from the **Billing Eligibility** list.
Markup or Markdown Percentage Eligibility	Indicates whether the line item is eligible for percentage based markup or markdown when the **Markup or Markdown Type** field is set to **Percentage**. The valid values are: • Eligible • Not Eligible
Post-Processing Required	Indicates that the line item is applicable for post-processing once the claim pricing rule is derived for a claim transaction.
Rating Information	Displays the rate type and rate value that you want to use while defining the rate for the line items.

Column Name	Column Description
Editable	Indicates that the rate type and rate value fields are editable while defining a claim pricing rule.
Rate Type	Indicates the rate type that you want to use while defining the rate for the line items.
Rate	Used to specify the rate that you want to use while defining the rate for the line items.

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Column Name	Column Description
	Column Name / **Column Description** **Note:** This field is editable when the **Editable** checkbox is selected in the **Rate** column of the **Additional Fees** section while defining or editing the **C1-ExtLookClaimTemplate** extendable lookup.

- **Record Actions** - This section contains the following buttons:

Button Name	Button Description
Edit	Used to edit the details of the claim template.
Delete	Used to delete the claim template. **Note:** You can delete a claim template when it is not yet used in a claim pricing rule type.
Duplicate	Used to create a new claim template using an existing claim template.

- **Record Information** - This section contains the following fields:

Field Name	Field Description
Business Object	Indicates the extendable lookup business object using which the claim template is created. In addition, a context menu appears corresponding to this field which helps in navigating to other screens in the application. **Note:** It has a link. On clicking the link, the **Business Object** screen appears where you can view the details of the respective business object.
Owner	Indicates who has created the claim template. The valid values are: • Framework • Base • Customer Modification

By default, the **Extendable Lookup Value** zone does not appear in the **Extendable Lookup** screen. It appears when you click the **Broadcast** (📡) icon corresponding to the claim template in the **Extendable Lookup Value List** zone.

Related Topics

For more information on...	See...
How to edit a claim template	Editing a Claim Template on page 2904
How to copy a claim template	Copying a Claim Template on page 2906
How to delete a claim template	Deleting a Claim Template on page 2907
How to view the details of a claim template	Viewing the Claim Template Details on page 2908

Defining a Claim Template

Procedure

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To define a claim template:

1. Search for the **Claim Template** extendable lookup in the **Extendable Lookup Query** screen.
2. In the **Search Results** section, click the link in the **Description** column corresponding to the *e*xtendable lookup business object whose details you want to view.
   The **Extendable Lookup** screen appears.
3. Click the **Add** button in the **Page Title** area of the **Extendable Lookup** screen.

   The **Claim Template** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details about the claim template. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Claim Template	Used to specify the claim template.	Yes
Description	Used to specify the description for the claim template.	Yes
Override Description	Used when you want to override the description of the claim template.	No
Detailed Description	Used to specify additional information about the claim template.	No
Status	Used to indicate the status of the claim template. The valid values are: • Active • Inactive **Note:** By default, the value is set to **Active**.	Yes

   - **Claim Template Usage** - Used to indicate when the claim template can be used while defining a claim pricing rule for a policy of a bill group. It contains the following field:

Field Name	Field Description	Mandatory (Yes or No)
Policy Status	Used to indicate whether you want to use the claim template while defining a claim pricing rule for a policy which is in the **In Force/Active**, **Post Runout**, or **Runout** status. The valid values are: • In Force/Active • Post Runout • Runout	Yes

   - **Claim Handling Fees** - Used to define the claim handling fees for the claim lines items which are added in the claim template.
   - **Default Markup or Markdown Values** - Used to indicate the default markup or markdown values for the claim line items which are added in the claim template.
   - **Line Items** - Used to add the claim line items in the claim template.
4. Enter the required details in the **Main** section.
5. Select the **In Force/Active**, **Post Runout**, or **Runout** option from the **Policy Status** dropdown list depending on whether you want to use the claim template while defining a claim pricing rule for a policy in a particular status.
6. Define the claim handling fees for the line items in the claim template, if required.
7. Define the default markup or markdown values for the line items in the claim template, if required.
8. Add the required the line items in the claim template.
9. Click **Save**.

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The claim template is added in the **C1-ExtLookClaimTemplate** extendable lookup.

Related Topics

For more information on...	See...
How to search for the **Claim Template** extendable lookup	Searching for the Claim Template Extendable Lookup on page 2892
Extendable Lookup screen	Extendable Lookup (Claim Template) on page 2893
How to define the claim handling fees for the line items in the claim template	Defining the Claim Handling Fees for Line Items in the Claim Template on page 2899
How to define the default markup or markdown values for the line items in the claim template	Defining the Default Markup or Markdown Values for Line Items in a Claim Template on page 2901
How to add the line items in a claim template	Adding a Line Item in a Claim Template on page 2902

Defining the Claim Handling Fees for Line Items in the Claim Template

Procedure

To define the claim handling fees for the line items in the claim template:

1. Ensure that the **Claim Handling Fees** section is expanded *w*hen you are defining, editing, or copying a claim template.

   The **Claim Handling Fees** section contains the following fields:

<table>
<tr><th>Field Name</th><th>Field Description</th><th>Mandatory (Yes or No)</th></tr>
<tr><td>Show Line Items in Pricing Rule</td><td>Used to indicate whether the claim line item is visible while defining or editing the pricing rules.</td><td>Not applicable</td></tr>
<tr><td>Fee Type</td><td>Used to indicate the charge type defined on the line items.</td><td>Yes</td></tr>
<tr><td>Fee</td><td>Used to indicate the type of rate defined on the line items.</td><td>Yes</td></tr>
<tr><td>Fee Significance</td><td>Used to indicate the purpose of the imposing the fees on the line items.</td><td>Yes</td></tr>
<tr><td>Fee Applicability</td><td>Displays one or more applicable claim line item on which the claim handling fees are imposed.<table><tr><th>Field Name</th><th>Field Description</th></tr><tr><td>Line Items</td><td>Indicates the line item that you want to use while defining claim handling fees for the claim pricing rule.</td></tr></table></td><td>Yes</td></tr>
<tr><td>Rating Information</td><td>Used to indicate one or more rate options which are valid for a line item.<table><tr><th>Field Name</th><th>Field Description</th><th>Mandatory (Yes or No)</th></tr><tr><td>Editable</td><td>Used to indicate whether the rate specified for a rate type is editable when you use the claim template in a claim pricing rule.</td><td>No</td></tr></table></td><td>Yes</td></tr>
</table>

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<table>
<tr><th>Field Name</th><th>Field Description</th><th>Mandatory (Yes or No)</th></tr>
<tr><td></td><td>
<table>
<tr><th>Field Name</th><th>Field Description</th><th>Mandatory (Yes or No)</th></tr>
<tr><td>Rate Type</td><td>Indicates the rate type that you want to use while defining the rate for the line items.</td><td>Yes</td></tr>
<tr><td>Rate</td><td>Used to specify the rate that you want to use while defining the rate for the line items.

Note: This field is editable when the Editable checkbox is selected in the Rating Information column of the Claim Handling Fees section while defining or editing the C1-ExtLookClaimTemplate extendable lookup.</td><td>Yes</td></tr>
</table>
</td><td></td></tr>
</table>

2. Enter the required details in the **Claim Handling Fees** section.
3. If you want to add more than one claim handling fee in the claim template, click the **Add** (+) icon and *t*hen repeat step 2.

> **Note:** However, if you want to remove a claim handling fee from the claim template, click the **Delete** (🗑) icon corresponding to the line item.

4. If you want to add more than one fee applicability in the claim template, click the **Add** (+) icon and *t*hen repeat step 2.

> **Note:** However, if you want to remove a fee applicability from the claim template, click the **Delete** (🗑) icon corresponding to the line item.

5. If you want to add more than one rating information in the claim template, click the **Add** (+) icon and *t*hen repeat step 2.

> **Note:** However, if you want to remove a rating information from the claim template, click the **Delete** (🗑) icon corresponding to the line item.

6. Click **Save**.
   The claim handling fees are defined for the line items in the claim template.

Related Topics

For more information on...	See...
How to define a claim template	Defining a Claim Template on page 2897
How to edit a claim template	Editing a Claim Template on page 2904
How to copy a claim template	Copying a Claim Template on page 2906

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Defining the Default Markup or Markdown Values for Line Items in a Claim Template

Procedure

To define the markup or markdown values for line items in a claim pricing rule:

1. Ensure that the **Default Markup or Markdown Values** section is expanded *w*hen you are defining, editing, or copying a claim template.

   The **Default Markup or Markdown Values** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Pricing Strategy	Used to indicate the pricing strategy. The valid values are: • Markdown • Markup • None	No
Markup or Markdown Type	Used to indicate the markup or markdown type for the claim line items. The valid values are: • Flat Amount • Percentage	No
Markup or Markdown Amount	Used to specify the markup or markdown amount.	No
Markup or Markdown Percentage	Used to specify the markup or markdown percentage.	No
Editable	Used to indicate whether the rate specified for a rate type is editable when you use the claim template in a claim pricing rule.	Not applicable
Rate Type	Indicates the minimum and maximum markup or markdown defined using the rate type.	Yes (Conditional) **Note:** This field is required when you define the rate from the respective field.
Rate	Used to specify the value for minimum and maximum markup or markdown using the rate type.	Yes (Conditional) **Note:** This field is required when you select the rate type from the respective field.

2. Enter the required details in the **Markup or Markdown Values** section.
3. If you want to add more than one default markup or markdown value in the claim template, click the **Add** (+) icon and *t*hen repeat step 2.

   Note: However, if you want to remove a default markup or markdown value from the claim template, click the **Delete** (🗑) icon corresponding to the line item.

4. Click **Save**.
   The markup or markdown values for line items are defined for the claim template.

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Related Topics

For more information on...	See...
How to define a claim template	Defining a Claim Template on page 2897
How to edit a claim template	Editing a Claim Template on page 2904
How to copy a claim template	Copying a Claim Template on page 2906

Adding a Line Item in a Claim Template

Prerequisites

To add a line item in a claim template, you should have:

- The line item defined in the **C1-ExtLookPricingRuleLineItem** extendable lookup.
- Rule types defined in the application (where the rule type usage is set to **ASO Billing Line Item Eligibility**) when you want to define rule based billing eligibility for a line item.

Procedure

To add a line item in a claim template:

1. Ensure that the **Line Items** section is expanded when you are defining, editing, or copying a claim template.

   The **Line Items** section contains the following fields in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Sequence	Used to indicate the order in which the calculation line should be generated for the line item.	Yes (Conditional) **Note:** This field is required while adding a line item in the claim template.
Line Item	Used to indicate the line item that you want to include in the claim template. **Note:** The list includes only those line items which are associated to the **Claim** pricing rule type category.	Yes (Conditional) **Note:** This field is required while adding a line item in the claim template.
Billing Eligibility	Used to indicate whether the line item is eligible for billing. If line item is not eligible for billing, the system does not create the calculation line for the line item. The valid values are: • **Eligible** - Used when the line item is eligible for billing. • **Not Eligible** - Used when the line item is not eligible for billing. • **Rule Based** - Used when you want to determine whether the line item is eligible for billing using certain business rules while executing the **Update Status (C1-TXNEX)** batch. • **Used Defined (Default No)** - Used when you want to define billing eligibility for the line item while defining a claim pricing rule using the claim template. If you select this option, by default, the **User Defined Billing Option** option is not selected for the line item in the claim pricing rule.	Yes (Conditional) **Note:** This field is required while adding a line item in the claim template.

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<table>
<tr><th>Field Name</th><th>Field Description</th><th>Mandatory (Yes or No)</th></tr>
<tr><td></td><td>• User Defined (Default Yes) - Used when you want to define billing eligibility for the line item while defining a claim pricing rule using the claim template. If you select this option, by default, the User Defined Billing Option option is selected for the line item in the claim pricing rule.</td><td></td></tr>
<tr><td>Rule Type</td><td>Used to indicate that rules of the specified rule type should be executed to determine whether the line item is eligible for billing.
Note:
The list includes only those rule types where the rule type usage is set to ASO Billing Line Item Eligibility.
The values appear in this list when you select the Rule Based option from the Billing Eligibility list.</td><td>Yes (Conditional)
Note: This field is required when you select the Rule Based option from the Billing Eligibility list.</td></tr>
<tr><td>Markup or Markdown Percentage Eligibility</td><td>Used to indicate whether the line item is eligible for percentage based markup or markdown when the Markup or Markdown Type field is set to Percentage. The valid values are:
• Eligible
• Not Eligible</td><td>Yes (Conditional)
Note: This field is required while adding a line item in the claim template.</td></tr>
<tr><td>Post-Processing Required</td><td>Used to indicate that the line item is applicable for post-processing once the claim pricing rule is derived for a claim transaction.</td><td>Yes (Conditional)
Note: This field is required while adding a line item in the claim template.</td></tr>
<tr><td>Rating Information</td><td>Displays the rate type and rate value that you want to use while defining the rate for the line items.
<table>
<tr><th>Field Name</th><th>Field Description</th><th>Mandatory (Yes or No)</th></tr>
<tr><td>Editable</td><td>Used to indicate that the rate type and rate value fields are editable while defining a claim pricing rule.</td><td>Not applicable</td></tr>
<tr><td>Rate Type</td><td>Used to indicate the rate type that you want to use while defining the rate for the line items.</td><td>Yes (Conditional)
Note: This field is required when you define the rate from the respective field.</td></tr>
<tr><td>Rate</td><td>Used to specify the rate that you want to use while defining the rate for the line items.</td><td>Yes (Conditional)</td></tr>
</table></td><td>Yes (Conditional)
Note: This field is required while adding a line item in the claim template.</td></tr>
</table>

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Field Name	Field Description			Mandatory (Yes or No)
	Field Name	**Field Description**	**Mandatory (Yes or No)**	
			Note: This field is required when you select the rate type from the respective field.	

2. Enter the required details in the **Line Items** section.
3. If you want to add more than one line item in the claim template, click the **Add** (+) icon and *t*hen repeat step 2.

Note: However, if you want to remove a line item from the claim template, click the **Delete** (🗑) icon corresponding to the line item.

4. Click **Save**.
   The line item is added in the claim template.

Related Topics

For more information on...	See...
How to define a claim template	Defining a Claim Template on page 2897
How to edit a claim template	Editing a Claim Template on page 2904
How to copy a claim template	Copying a Claim Template on page 2906

Editing a Claim Template

Procedure

To edit a claim template:

1. Search for the **Claim Template** extendable lookup in the **Extendable Lookup Query** screen.
2. In the **Search Results** section, click the link in the **Description** column corresponding *t*o the extendable lookup business object whose details you want to view.
   The **Extendable Lookup** screen appears.
3. In the **Extendable Lookup Value List** zone, click the **Edit** (✎) icon in the **Edit** column corresponding *t*o the claim template whose details you want to edit.

   The **Claim Template** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details about the claim template. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Claim Template	Displays the claim template.	Not applicable
Description	Used to specify the description for the claim template.	Yes
Override Description	Used when you want to override the description of the claim template.	No

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Field Name	Field Description	Mandatory (Yes or No)
Detailed Description	Used to specify additional information about the claim template.	No
Status	Used to indicate the status of the claim template. The valid values are: • Active • Inactive	Yes

- **Claim Template Usage** - Used to indicate when the claim template can be used while defining a claim pricing rule for a policy of a bill group. It contains the following field:

Field Name	Field Description	Mandatory (Yes or No)
Policy Status	Used to indicate whether you want to use the claim template while defining a claim pricing rule for a policy which is in the **In Force/Active**, **Post Runout**, or **Runout** status. The valid values are: • In Force/Active • Post Runout • Runout	Yes

- **Claim Handling Fees** - Used to indicate the claim handling fees for the lines items which are added in the claim template.
- **Default Markup or Markdown Values** - Used to indicate the default markup or markdown values for the claim line items which are added in the claim template.
- **Line Items** - Used to indicate the line items in the claim template.

Tip: Alternatively, you can edit the details of a claim template by clicking the **Edit** button in the **Extendable Lookup Value** zone.

4. Modify the required details in the **Main** section.
5. Modify the policy status in the **Claim Template Usage** section, if required.
6. Add, edit, or remove the claim handling fees for the line items in the claim template, if required.
7. Modify the default markup or markdown values for the line items in the claim template, if required.
8. Add, edit, or remove line items from the claim template, if required.
9. Click **Save**.
   The changes made to the claim template are saved.

Related Topics

For more information on...	See...
How to search for the **Claim Template** extendable lookup	Searching for the Claim Template Extendable Lookup on page 2892
Extendable Lookup screen	Extendable Lookup (Claim Template) on page 2893
Extendable Lookup Value List zone	Extendable Lookup Value List on page 2893
Extendable Lookup Value zone	Extendable Lookup Value on page 2894
How to define the claim handling fees for the line items in the claim template	Defining the Claim Handling Fees for Line Items in the Claim Template on page 2899
How to define the default markup or markdown values for the line items in the claim template	Defining the Default Markup or Markdown Values for Line Items in a Claim Template on page 2901

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For more information on...	See...
How to add the line items in a claim template	Adding a Line Item in a Claim Template on page 2902

Copying a Claim Template

Instead of creating a claim template from scratch, you can create a new claim template using an existing claim template. This is possible through copying a claim template. On copying a claim template, the details including the line items and default markup or markdown values are copied to the new claim template. You can then edit the details, if required.

Prerequisites

To copy a claim template, you should have:

- Claim template (whose copy you want to create) defined in the application

Procedure

To copy a claim template:

1. Search for the **Claim Template** extendable lookup in the **Extendable Lookup Query** screen.
2. In the **Search Results** section, click the link in the **Description** column corresponding to the *e*xtendable lookup business object whose details you want to view.
   The **Extendable Lookup** screen appears.
3. In the **Extendable Lookup Value List** zone, click the **Duplicate** (⧉) icon in the **Duplicate** column *c*orresponding to the claim template whose copy you want to create.

   The **Claim Template** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details about the claim template. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Claim Template	Used to specify the claim template.	Yes
Description	Used to specify the description for the claim template.	Yes
Override Description	Used when you want to override the description of the claim template.	No
Detailed Description	Used to specify additional information about the claim template.	No
Status	Used to indicate the status of the claim template. The valid values are: • Active • Inactive	Yes

   - **Claim Template Usage** - Used to indicate when the claim template can be used while defining a claim pricing rule for a policy of a bill group. It contains the following field:

Field Name	Field Description	Mandatory (Yes or No)
Policy Status	Used to indicate whether you want to use the claim template while defining a claim pricing rule for a policy which is in the **In Force/Active**, **Post Runout**, or **Runout** status. The valid values are: • In Force/Active	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	• Post Runout • Runout	

- **Claim Handling Fees** - Used to indicate the claim handling fees for the lines items which are added in the claim template.
- **Default Markup or Markdown Values** - Used to indicate the default markup or markdown values for the line items which are added in the claim template.
- **Line Items** - Used to add the claim line items in the claim template.

Tip: Alternatively, you can copy a claim template by clicking the **Duplicate** button in the **Extendable Lookup Value** zone.

4. Enter the required details in the **Main** section.
5. Select the **In Force/Active**, **Post Runout**, or **Runout** option from the **Policy Status** list depending on *w*hether you want to use the claim template while defining a claim pricing rule for a policy in a particular status.
6. Add, edit, or remove the claim handling fees for the line items in the claim template, if required.
7. Modify the default markup or markdown values for the line items in the claim template, if required.
8. Add, edit, or remove the line items from the claim template, if required.
9. Click **Save**.
   The new claim template is added in the **C1-ExtLookClaimTemplate** extendable lookup.

Related Topics

For more information on...	See...
How to search for the **Claim Template** extendable lookup	Searching for the Claim Template Extendable Lookup on page 2892
Extendable Lookup screen	Extendable Lookup (Claim Template) on page 2893
Extendable Lookup Value List zone	Extendable Lookup Value List on page 2893
Extendable Lookup Value zone	Extendable Lookup Value on page 2894
How to define the claim handling fees for the line items in the claim template	Defining the Claim Handling Fees for Line Items in the Claim Template on page 2899
How to define the default markup or markdown values for the line items in the claim template	Defining the Default Markup or Markdown Values for Line Items in a Claim Template on page 2901
How to add the line items in a claim template	Adding a Line Item in a Claim Template on page 2902

Deleting a Claim Template

Procedure

To delete a claim template:

1. Search for the **Claim Template** extendable lookup in the **Extendable Lookup Query** screen.
2. In the **Search Results** section, click the link in the **Description** column corresponding to the extendable lookup business object whose details you want to view.
   The **Extendable Lookup** screen appears.
3. In the **Extendable Lookup Value List** zone, click the **Delete** (🗑) icon in the **Delete** column corresponding to the claim template that you want to delete.
   A message appears confirming whether you want to delete the claim template.

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> **Note:** You can delete a claim template when it is not yet used in a claim pricing rule type.

> **Tip:** Alternatively, you can delete a claim template by clicking the **Delete** button in the **Extendable Lookup Value** zone.

4. Click **OK**.
   The claim template is deleted from the **C1-ExtLookClaimTemplate** extendable lookup.

Related Topics

For more information on...	See...
How to search for the **Claim Template** extendable lookup	Searching for the Claim Template Extendable Lookup on page 2892
Extendable Lookup screen	Extendable Lookup (Claim Template) on page 2893
Extendable Lookup Value List zone	Extendable Lookup Value List on page 2893
Extendable Lookup Value zone	Extendable Lookup Value on page 2894

Viewing the Claim Template Details

Procedure

To view the details of a claim template:

1. Search for the **Claim Template** extendable lookup in the **Extendable Lookup Query** screen.
2. In the **Search Results** section, click the link in the **Description** column corresponding to the *e*xtendable lookup business object whose details you want to view.
   The **Extendable Lookup** screen appears.
3. In the **Extendable Lookup Value List** zone, click the **Broadcast** (ᯤ) icon corresponding to the claim template whose details you want to view.
   The **Extendable Lookup Value** zone appears.
4. View the details of the claim template in the **Extendable Lookup Value** zone.

Related Topics

For more information on...	See...
How to search for the **Claim Template** extendable lookup	Searching for the Claim Template Extendable Lookup on page 2892
Extendable Lookup screen	Extendable Lookup (Claim Template) on page 2893
Extendable Lookup Value List zone	Extendable Lookup Value List on page 2893
Extendable Lookup Value zone	Extendable Lookup Value on page 2894

Rate Option Extendable Lookup

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

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- The rate schedule that you want to use while defining the price item pricing.
- Currency in which you want to define the price item pricing.
- Whether zero pricing should be displayed in the bill.
- Whether the transactions mapped to the price item should be ignored for billing.
- Whether the transactions mapped to the price item should be aggregated for billing.
- The aggregation schedule using which the transactions should be aggregated for billing.
- How and when you want to rate the transaction legs which are mapped to the price item.
- Whether you want the price item pricing to be applied to all customers or only to the new customers.

Once the rate options are defined in the extendable lookup, you can associate one or more rate options with a price item while adding the price item in a claim, specific stop-loss, aggregate stop-loss, retention type claim based, retention type enrollment based, or ancillary pricing rule type. You can then use the rate option while defining pricing rule for the respective price item using the respective pricing rule type. The rate option specified in a pricing rule is used while creating the price item pricing or price assignment for the pricing rule.

For example, the following table illustrates how the rate options can be used for different price items in a pricing rule type:

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

The **Extendable Lookup Query** screen allows you to search for an extendable lookup. It contains the following zone:

- Extendable Lookup Search on page 2909

Extendable Lookup Search

The **Extendable Lookup Search** zone allows you to search for an extendable lookup. It contains the following two sections:

- **Search Criteria** - The **Search Criteria** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Business Object	Used to search a particular extendable lookup business object.	No
Description	Used to search extendable lookups with a particular description.	No

Note: You must specify at least one search criterion while searching for an extendable lookup.

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- **Search Results** - On clicking the **Search** button, the search results appear based on the specified search criteria. The **Search Results** section contains the following columns:

Column Name	Column Description
Business Object	Displays the extendable lookup business object.
Description	Displays the description of the extendable lookup business object.
	Note: It has a link. On clicking the link, the **Extendable Lookup** screen appears where you can view the details of the respective extendable lookup.

Related Topics

For more information on...	See...
How to search for the **Rate Option** extendable lookup	Searching for the Rate Option Extendable Lookup on page 2910
How to view the values of the **Rate Option** extendable lookup	Viewing the Values of the Rate Option Extendable Lookup on page 2910

Searching for the Rate Option Extendable Lookup

Procedure

To search for the **Rate Option** extendable lookup:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **E** and then click **Extendable Lookup**.
   The **Extendable Lookup Query** screen appears.
3. In the **Extendable Lookup Search** zone, enter **C1-ExtLookRetTypeRateOpt** in the **Business Object** field.

   Note: ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.
4. Click **Search**.
   The **Rate Option** extendable lookup business object appears in the **Search Results** section.

Related Topics

For more information on...	See...
Extendable Lookup Query screen	Rate Option Extendable Lookup on page 2908
Extendable Lookup Search zone	Extendable Lookup Search on page 2909

Viewing the Values of the Rate Option Extendable Lookup

Procedure

To view the values of the **Rate Option** extendable lookup:

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1. Search for the **Rate Option** extendable lookup in the **Extendable Lookup Query** screen.
2. In the **Search Results** section, click the link in the **Description** column corresponding to the *e*xtendable lookup business object whose details you want to view.
   The **Extendable Lookup** screen appears.
3. View the values of the **Rate Option** extendable lookup in the **Extendable Lookup Value List** zone.

Related Topics

For more information on...	See...
How to search for the **Rate Option** extendable lookup	Searching for the Rate Option Extendable Lookup on page 2910
Extendable Lookup screen	Extendable Lookup (Rate Option) on page 2911
Extendable Lookup Value List zone	Extendable Lookup Value List on page 2911

Extendable Lookup (Rate Option)

The **Extendable Lookup** screen allows you to view the values of the **Rate Option (C1-ExtLookRetTypeRateOpt)** extendable lookup. It also allows you to define, edit, copy, and delete a rate option. It contains the following zones:

- Extendable Lookup Value List on page 2911
- Extendable Lookup Value on page 2912

Extendable Lookup Value List

The **Extendable Lookup Value List** zone lists the values which are already defined for the **Rate Option** extendable lookup. It contains the following columns:

Column Name	Column Description
Value	Displays the rate option.
Description	Displays the description of the rate option.
Owner	Indicates who has created the rate option. The valid values are: • Framework • Base • Customer Modification
Edit	On clicking the **Edit** (✎) icon, the **Rate Option** screen appears where you can edit the details of the rate option.
Duplicate	On clicking the **Duplicate** (⧉) icon, the **Rate Option** screen appears where you can define a new rate option using an existing rate option.
Delete	On clicking the **Delete** (🗑) icon, you can delete the rate option. **Note:** You can delete a rate option when it is not yet used in a pricing rule type.
Detailed Description	Displays additional information about the rate option.

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Note: Pagination is used to display limited number of records in this zone. You can use the navigation buttons, such as **Previous** and **Next** to navigate between pages.

On clicking the **Broadcast** (📡) icon corresponding to a rate option, the **Extendable Lookup Value** zone appears with the details of the respective rate option.

You can filter the list using various search criteria (such as, **Value** and **Description**) available in the **Filter** area. By default, the **Filter** area is hidden. You can view the **Filter** area by clicking the **Filters** (▽) icon in the upper right corner of this zone.

Related Topics

For more information on...	See...
How to edit a rate option	Editing a Rate Option on page 2916
How to copy a rate option	Copying a Rate Option on page 2919
How to delete a rate option	Deleting a Rate Option on page 2921
How to view the details of a rate option	Viewing the Rate Option Details on page 2921

Extendable Lookup Value

The **Extendable Lookup Value** zone displays the details of the rate option. It contains the following sections:

- **Main** - Displays basic information about the rate option. It contains the following fields:

Field Name	Field Description
Rate Option	Displays the rate option.
Description	Displays the description of the rate option.
Override Description	Displays the overridden description of the rate option.
Detailed Description	Displays additional information about the rate option.
Status	Indicates the status of the rate option. The valid values are: • Active • Inactive
Rate Schedule	Indicates the rate schedule that will be used while defining the price item pricing. It is the rate schedule which helps the system to create calculation lines for a transaction leg. **Note:** It has a link. On clicking the link, the **Rate Schedule** screen appears where you can view the details of the respective rate schedule.
Pricing Currency	Indicates the currency in which the price item pricing will be defined.
Print Zero	Indicates whether zero pricing will be displayed in the bill. The valid values are: • Yes • No
Ignore Transaction	Indicates whether the transactions mapped to the price item will be ignored for billing. The valid values are: • Yes

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Field Name	Field Description
	• No
Aggregate Transaction	Indicates whether the transactions mapped to the price item will be aggregated for billing. The valid values are: • Yes • No
Aggregation Schedule	Indicates the aggregation schedule using which the transactions will be aggregated for billing.
Transaction Rating Criteria	Indicates how and when the transaction legs which are mapped to the price item are rated. The valid values are: • Aggregate Transactions and Then Rate SQs • Do Not Rate Transactions • Rate Transaction and Aggregate Calc Lines • Rate Transactions
Apply To	Indicates whether the price item pricing will be applied to all customers or only to the new customers. The valid values are: • All Customers • New Customers

- **Record Actions** - This section contains the following buttons:

Button Name	Button Description
Edit	Used to edit the details of the rate option.
Delete	Used to delete the rate option. **Note:** You can delete a rate option when it is not yet used in a pricing rule type.
Duplicate	Used to create a new rate option using an existing rate option.

- **Record Information** - This section contains the following fields:

Field Name	Field Description
Business Object	Indicates the extendable lookup business object using which the rate option is created. In addition, a context menu appears corresponding to this field which helps in navigating to other screens in the application. **Note:** It has a link. On clicking the link, the **Business Object** screen appears where you can view the details of the respective business object.
Owner	Indicates who has created the rate option. The valid values are: • Framework • Base • Customer Modification

By default, the **Extendable Lookup Value** zone does not appear in the **Extendable Lookup** screen. It appears when you click the **Broadcast** (📡) icon corresponding to the rate option in the **Extendable Lookup Value List** zone.

Related Topics

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For more information on...	See...
How to edit a rate option	Editing a Rate Option on page 2916
How to copy a rate option	Copying a Rate Option on page 2919
How to delete a rate option	Deleting a Rate Option on page 2921
How to view the details of a rate option	Viewing the Rate Option Details on page 2921

Defining a Rate Option

Prerequisites

To define a rate option, you should have:

- Rate schedules, currencies, and aggregation schedules defined in the application

Procedure

To define a rate option:

1. Search for the **Rate Option** extendable lookup in the **Extendable Lookup Query** screen.
2. In the **Search Results** section, click the link in the **Description** column corresponding *t*o the extendable lookup business object whose details you want to view.
   The **Extendable Lookup** screen appears.
3. Click the **Add** button in the **Page Title** area of the **Extendable Lookup** screen.

   The **Rate Option** screen appears. It contains the following section:

   - **Main** - Used to specify basic details about the rate option. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Rate Option	Used to specify the rate option.	Yes
Description	Used to specify the description for the rate option.	Yes
Override Description	Used when you want to override the description of the rate option.	No
Detailed Description	Used to specify additional information about the rate option.	No
Status	Used to indicate the status of the rate option. The valid values are: • Active • Inactive **Note:** By default, the value is set to **Active**.	Yes
Rate Schedule	Used to indicate the rate schedule that you want to use while defining the price item pricing. It is the rate schedule which helps the system to create calculation lines for a transaction leg. **Note:** The **Search** (🔍) icon appears corresponding to this field. On clicking the **Search** icon, the **Rate Schedule Search** window appears.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
Pricing Currency	Used to indicate the currency in which you want to define the price item pricing.	Yes
Print Zero	Used to indicate whether zero pricing should be displayed in the bill. The valid values are: • Yes • No **Note:** By default, the value is set to **Yes**.	Yes
Ignore Transaction	Used to indicate whether the transactions mapped to the price item should be ignored for billing. The valid values are: • Yes • No **Note:** By default, the value is set to **No**.	Yes
Aggregate Transaction	Used to indicate whether the transactions mapped to the price item should be aggregated for billing. The valid values are: • Yes • No **Note:** By default, the value is set to **No**. This field is disabled when the **Ignore Transaction** field is set to **Yes**.	Yes
Aggregation Schedule	Used to indicate the aggregation schedule using which the transactions should be aggregated for billing. **Note:** This field is disabled when the **Ignore Transaction** field is set to **Yes**.	Yes (Conditional) **Note:** This field is required when the **Aggregate Transaction** field is set to **Yes**.
Transaction Rating Criteria	Used to indicate how and when you want to rate the transaction legs which are mapped to the price item. The valid values are: • Aggregate Transactions and Then Rate SQs **Note:** This value appears in the list when the **Ignore Transaction** field is set to **No** and the **Aggregate Transaction** field is set to **Yes**. • Do Not Rate Transactions • Rate Transaction and Aggregate Calc Lines **Note:** This value appears in the list when the **Ignore Transaction** field is set to **No** and the **Aggregate Transaction** field is set to **Yes**.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	• Rate Transactions **Note:** This value appears in the list only when the **Ignore Transaction** field is set to either **Yes** or **No** and the **Aggregate Transaction** field is set to **No**. **Note:** By default, the value is set to **Do Not Rate Transactions**.	
Apply To	Used to indicate whether you want the price item pricing to be applied to all customers or only to the new customers. The valid values are: • All Customers • New Customers **Note:** By default, the value is set to **All Customers**.	Yes

4. Enter the required details in the **Main** section.
5. Click **Save**.
   The rate option is added in the **C1-ExtLookRetTypeRateOpt** extendable lookup.

Related Topics

For more information on...	See...
How to search for the **Rate Option** extendable lookup	Searching for the Rate Option Extendable Lookup on page 2910
Extendable Lookup screen	Extendable Lookup (Rate Option) on page 2911

Editing a Rate Option

Prerequisites

To edit a rate option, you should have:

- Rate schedules, currencies, and aggregation schedules defined in the application

Procedure

To edit a rate option:

1. Search for the **Rate Option** extendable lookup in the **Extendable Lookup Query** screen.
2. In the **Search Results** section, click the link in the **Description** column corresponding to the *e*xtendable lookup business object whose details you want to view.
   The **Extendable Lookup** screen appears.
3. In the **Extendable Lookup Value List** zone, click the **Edit** (✎) icon in the **Edit** column corresponding to the rate option whose details you want to edit.

   The **Rate Option** screen appears. It contains the following section:

   - **Main** - Used to specify basic details about the rate option. It contains the following fields:

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Field Name	Field Description	Mandatory (Yes or No)
Rate Option	Displays the rate option.	Not applicable
Description	Used to specify the description for the rate option.	Yes
Override Description	Used when you want to override the description of the rate option.	No
Detailed Description	Used to specify additional information about the rate option.	No
Status	Used to indicate the status of the rate option. The valid values are: • Active • Inactive	Yes
Owner	Indicates who has created the rate option. The valid values are: • Framework • Base • Customer Modification	Not applicable
Rate Schedule	Used to indicate the rate schedule that you want to use while defining the price item pricing. It is the rate schedule which helps the system to create calculation lines for a transaction leg. **Note:** The **Search** (🔍) icon appears corresponding to this field. On clicking the **Search** icon, the **Rate Schedule Search** window appears.	Yes
Pricing Currency	Used to indicate the currency in which you want to define the price item pricing.	Yes
Print Zero	Used to indicate whether zero pricing should be displayed in the bill. The valid values are: • Yes • No	Yes
Ignore Transaction	Used to indicate whether the transactions mapped to the price item should be ignored for billing. The valid values are: • Yes • No	Yes
Aggregate Transaction	Used to indicate whether the transactions mapped to the price item should be aggregated for billing. The valid values are: • Yes • No **Note:** This field is disabled when the **Ignore Transaction** field is set to **Yes**.	Yes
Aggregation Schedule	Used to indicate the aggregation schedule using which the transactions should be aggregated for billing.	Yes (Conditional)

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Field Name	Field Description	Mandatory (Yes or No)
	Note: This field is disabled when the **Ignore Transaction** field is set to **Yes**.	**Note:** This field is required when the **Aggregate Transaction** field is set to **Yes**.
Transaction Rating Criteria	Used to indicate how and when you want to rate the transaction legs which are mapped to the price item. The valid values are: • Aggregate Transactions and Then Rate SQs **Note:** This value appears in the list when the **Ignore Transaction** field is set to **No** and the **Aggregate Transaction** field is set to **Yes**. • Do Not Rate Transactions • Rate Transaction and Aggregate Calc Lines **Note:** This value appears in the list when the **Ignore Transaction** field is set to **No** and the **Aggregate Transaction** field is set to **Yes**. • Rate Transactions **Note:** This value appears in the list only when the **Ignore Transaction** field is set to either **Yes** or **No** and the **Aggregate Transaction** field is set to **No**.	Yes
Apply To	Used to indicate whether you want the price item pricing to be applied to all customers or only to the new customers. The valid values are: • All Customers • New Customers	Yes

Tip: Alternatively, you can edit the details of a rate option by clicking the **Edit** button in the **Extendable Lookup Value** zone.

4. Modify the required details in the **Main** section.
5. Click **Save**.
   The changes made to the rate option are saved.

Related Topics

For more information on...	See...
How to search for the **Rate Option** extendable lookup	Searching for the Rate Option Extendable Lookup on page 2910
Extendable Lookup screen	Extendable Lookup (Rate Option) on page 2911
Extendable Lookup Value List zone	Extendable Lookup Value List on page 2911
Extendable Lookup Value zone	Extendable Lookup Value on page 2912

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Copying a Rate Option

Instead of creating a rate option from scratch, you can create a new rate option using an existing rate option. This is possible through copying a rate option. On copying a rate option, the pricing and transaction aggregation details are copied to the new rate option. You can then edit the details, if required.

Prerequisites

To copy a rate option, you should have:

- Rate option (whose copy you want to create) defined in the application
- Rate schedules, currencies, and aggregation schedules defined in the application

Procedure

To copy a rate option:

1. Search for the **Rate Option** extendable lookup in the **Extendable Lookup Query** screen.
2. In the **Search Results** section, click the link in the **Description** column corresponding to the *e*xtendable lookup business object whose details you want to view.
   The **Extendable Lookup** screen appears.
3. In the **Extendable Lookup Value List** zone, click the **Duplicate** (⧉) icon in the **Duplicate** column corresponding to the rate option whose copy you want to create.

   The **Rate Option** screen appears. It contains the following section:

   - **Main** - Used to specify basic details about the rate option. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Rate Option	Used to specify the rate option.	Yes
Description	Used to specify the description for the rate option.	Yes
Override Description	Used when you want to override the description of the rate option.	No
Detailed Description	Used to specify additional information about the rate option.	No
Status	Used to indicate the status of the rate option. The valid values are: • Active • Inactive	Yes
Rate Schedule	Used to indicate the rate schedule that you want to use while defining the price item pricing. It is the rate schedule which helps the system to create calculation lines for a transaction leg. **Note:** The **Search** (🔍) icon appears corresponding to this field. On clicking the **Search** icon, the **Rate Schedule Search** window appears.	Yes
Pricing Currency	Used to indicate the currency in which you want to define the price item pricing.	Yes
Print Zero	Used to indicate whether zero pricing should be displayed in the bill. The valid values are: • Yes	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	• No	
Ignore Transaction	Used to indicate whether the transactions mapped to the price item should be ignored for billing. The valid values are: • Yes • No	Yes
Aggregate Transaction	Used to indicate whether the transactions mapped to the price item should be aggregated for billing. The valid values are: • Yes • No **Note:** This field is disabled when the **Ignore Transaction** field is set to **Yes**.	Yes
Aggregation Schedule	Used to indicate the aggregation schedule using which the transactions should be aggregated for billing. **Note:** This field is disabled when the **Ignore Transaction** field is set to **Yes**.	Yes (Conditional) **Note:** This field is required when the **Aggregate Transaction** field is set to **Yes**.
Transaction Rating Criteria	Used to indicate how and when you want to rate the transaction legs which are mapped to the price item. The valid values are: • Aggregate Transactions and Then Rate SQs **Note:** This value appears in the list when the **Ignore Transaction** field is set to **No** and the **Aggregate Transaction** field is set to **Yes**. • Do Not Rate Transactions • Rate Transaction and Aggregate Calc Lines **Note:** This value appears in the list when the **Ignore Transaction** field is set to **No** and the **Aggregate Transaction** field is set to **Yes**. • Rate Transactions **Note:** This value appears in the list only when the **Ignore Transaction** field is set to either **Yes** or **No** and the **Aggregate Transaction** field is set to **No**.	Yes
Apply To	Used to indicate whether you want the price item pricing to be applied to all customers or only to the new customers. The valid values are: • All Customers • New Customers	Yes

Tip: Alternatively, you can copy a rate option by clicking the **Duplicate** button in the **Extendable Lookup Value** zone.

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4. Enter the required details in the **Main** section.
5. Click **Save**.
   The new rate option is added in the **C1-ExtLookRetTypeRateOpt** extendable lookup.

Related Topics

For more information on...	See...
How to search for the **Rate Option** extendable lookup	Searching for the Rate Option Extendable Lookup on page 2910
Extendable Lookup screen	Extendable Lookup (Rate Option) on page 2911
Extendable Lookup Value List zone	Extendable Lookup Value List on page 2911
Extendable Lookup Value zone	Extendable Lookup Value on page 2912

Deleting a Rate Option

Procedure

To delete a rate option:

1. Search for the **Rate Option** extendable lookup in the **Extendable Lookup Query** screen.
2. In the **Search Results** section, click the link in the **Description** column corresponding to the extendable lookup business object whose details you want to view.
   The **Extendable Lookup** screen appears.
3. In the **Extendable Lookup Value List** zone, click the **Delete** (🗑) icon in the **Delete** column corresponding to the rate option that you want to delete.
   A message appears confirming whether you want to delete the rate option.

> **Note:** You can delete a rate option when it is not yet used in a pricing rule type.

> **Tip:** Alternatively, you can delete a rate option by clicking the **Delete** button in the **Extendable Lookup Value** zone.

4. Click **OK**.
   The rate option is deleted from the **C1-ExtLookRetTypeRateOpt** extendable lookup.

Related Topics

For more information on...	See...
How to search for the **Rate Option** extendable lookup	Searching for the Rate Option Extendable Lookup on page 2910
Extendable Lookup screen	Extendable Lookup (Rate Option) on page 2911
Extendable Lookup Value List zone	Extendable Lookup Value List on page 2911
Extendable Lookup Value zone	Extendable Lookup Value on page 2912

Viewing the Rate Option Details

Procedure

To view the details of a rate option:

1. Search for the **Rate Option** extendable lookup in the **Extendable Lookup Query** screen.

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2. In the **Search Results** section, click the link in the **Description** column corresponding to the *e*xtendable lookup business object whose details you want to view.
   The **Extendable Lookup** screen appears.
3. In the **Extendable Lookup Value List** zone, click the **Broadcast** (ᯤ) icon corresponding to the rate option whose details you want to view.
   The **Extendable Lookup Value** zone appears.
4. View the details of the rate option in the **Extendable Lookup Value** zone.

Related Topics

For more information on...	See...
How to search for the **Rate Option** extendable lookup	Searching for the Rate Option Extendable Lookup on page 2910
Extendable Lookup screen	Extendable Lookup (Rate Option) on page 2911
Extendable Lookup Value List zone	Extendable Lookup Value List on page 2911
Extendable Lookup Value zone	Extendable Lookup Value on page 2912

Rate Type Extendable Lookup

A new extendable lookup for rate type named **C1-ExtLookRateType** is introduced in the system. A rate type extendable lookup enables you to specify the following:

- Whether the system should calculate fees on sum of all applicable claim charges or separately for each applicable claim charge.
- The billable charge line type using which the calculation line should be created when the fee is calculated on sum of all applicable claim charges
- Whether the system should calculate percentage based markup or markdown on sum of all eligible claim charges or separately for each eligible claim charge
- The billable charge line type using which the calculation line should be created when the minimum and maximum markup or markdown is calculated on sum of all eligible claim charges
- Whether the rate type can be used while adding fees, default markup or markdown, or claim line items

Following rate types are used in the system:

- Maximum Fee
- Minimum Fee
- Retained Percentage
- Minimum Markup or Markdown
- Maximum Markup or Markdown
- Minimum Amount
- Maximum Amount

The **Extendable Lookup Query** screen allows you to search for an extendable lookup. It contains the following zone:

- Extendable Lookup Search on page 2922

Extendable Lookup Search

The **Extendable Lookup Search** zone allows you to search for an extendable lookup. It contains the following two sections:

- **Search Criteria** - The **Search Criteria** section contains the following fields:

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Field Name	Field Description	Mandatory (Yes or No)
Business Object	Used to search a particular extendable lookup business object.	No
Description	Used to search extendable lookups with a particular description.	No

Note: You must specify at least one search criterion while searching for an extendable lookup.

- **Search Results** - On clicking the **Search** button, the search results appear based on the specified search criteria. The **Search Results** section contains the following columns:

Column Name	Column Description
Business Object	Displays the extendable lookup business object.
Description	Displays the description of the extendable lookup business object.
	Note: It has a link. On clicking the link, the **Extendable Lookup** screen appears where you can view the details of the respective extendable lookup.

Related Topics

For more information on...	See...
How to search for the **Rate Type** extendable lookup	Searching for the Rate Type Extendable Lookup on page 2923
How to view the values of the **Rate Type** extendable lookup	Viewing the Values of the Rate Type Extendable Lookup on page 2924

Searching for the Rate Type Extendable Lookup

Procedure

To search for the **Rate Type** extendable lookup:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **E** and then click **Extendable Lookup**.
   The **Extendable Lookup Query** screen appears.
3. In the **Extendable Lookup Search** zone, enter **C1-ExtLookRateType** in the **Business Object** field.

   Note: ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.
4. Click **Search**.
   The **Rate Type** extendable lookup business object appears in the **Search Results** section.

Related Topics

For more information on...	See...
Extendable Lookup Query screen	Rate Type Extendable Lookup on page 2922

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For more information on...	See...
Extendable Lookup Search zone	Extendable Lookup Search on page 2922

Viewing the Values of the Rate Type Extendable Lookup

Procedure

To view the values of the **Rate Type** extendable lookup:

1. Search for the **Rate Type** extendable lookup in the **Extendable Lookup Query** screen.
2. In the **Search Results** section, click the link in the **Description** column corresponding to the *e*xtendable lookup business object whose details you want to view.
   The **Extendable Lookup** screen appears.
3. View the values of the **Rate Type** extendable lookup in the **Extendable Lookup Value List** zone.

Related Topics

For more information on...	See...
How to search for the **Rate Type** extendable lookup	Searching for the Rate Type Extendable Lookup on page 2923
Extendable Lookup screen	Extendable Lookup (Rate Type) on page 2924
Extendable Lookup Value List zone	Extendable Lookup Value List on page 2924

Extendable Lookup (Rate Type)

The **Extendable Lookup** screen allows you to view the values of the **Rate Type (C1-ExtLookRateType)** extendable lookup. It also allows you to define, edit, copy, and delete a rate type. It contains the following zones:

- Extendable Lookup Value List on page 2911
- Extendable Lookup Value on page 2912

Extendable Lookup Value List

The **Extendable Lookup Value List** zone lists the values which are already defined for the **Rate Type** extendable lookup. It contains the following columns:

Column Name	Column Description
Value	Displays the rate type.
Description	Displays the description of the rate type.
Owner	Indicates the user who has created the rate type. The valid values are: • Framework • Base • Customer Modification
Edit	On clicking the **Edit** (✎) icon, the **Rate Type** screen appears where you can edit the details of the rate type.

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Column Name	Column Description
Duplicate	On clicking the **Duplicate** (⧉) icon, the **Rate Type** screen appears where you can define a rate type item using an existing rate type.
Delete	On clicking the **Delete** (🗑) icon, you can delete the rate type.
	Note: You can delete a rate type when it is not yet used in a pricing rule type.
Detailed Description	Displays additional information about the rate type.

Note: Pagination is used to display limited number of records in this zone. You can use the navigation buttons, such as **Previous** and **Next** to navigate between pages.

On clicking the **Broadcast** (📡) icon corresponding to a rate type, the **Extendable Lookup Value** zone appears with the details of the respective rate type.

You can filter the list using various search criteria (such as, **Value** and **Description**) available in the **Filter** area. By default, the **Filter** area is hidden. You can view the **Filter** area by clicking the **Filters** (▽) icon in the upper right corner of this zone.

Related Topics

For more information on...	See...
How to edit a rate type	Editing a Rate Type on page 2928
How to copy a rate type	Copying a Rate Type on page 2930
How to delete a rate type	Deleting a Rate Type on page 2931
How to view the details of a rate type	Viewing the Rate Type Details on page 2932

Extendable Lookup Value

The **Extendable Lookup Value** zone displays the details of the rate type. It contains the following sections:

- **Main** - Displays basic information about the rate type. It contains the following fields:

Field Name	Field Description
Rate Type	Displays the rate type.
Description	Displays the description for the rate type.
Override Description	Displays the overridden description of the rate type.
Detailed Description	Displays the additional information about the rate type.
Status	Indicates the status of the rate type. The valid values are: • Active • Inactive
Line-Specific Calculation	Indicates whether the calculation of fees, percentage, or markup and markdown should take place for each and every claim charge or not. The valid values are: • Yes • No

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Field Name	Field Description
Billable Charge Line Type	Indicates the billable charge line type using which the calculation line is created for the charge.

Rate Type Usage - Lists the various charges to which the rate type is associated. It contains the following column in a grid:

Column Name	Column Description
Applicable To	Indicates the claim handling fees that are associated with the rate type.

- **Record Actions** - This section contains the following buttons:

Button Name	Button Description
Edit	Used to edit the details of the rate type.
Delete	Used to delete the rate type. **Note:** You can delete a rate type when it is not yet used in a pricing rule type.
Duplicate	Used to create a new rate type using an existing line item.

- **Record Information** - This section contains the following fields:

Field Name	Field Description
Business Object	Indicates the extendable lookup business object using which the rate type is created. In addition, a context menu appears corresponding to this field which helps in navigating to other screens in the application. **Note:** It has a link. On clicking the link, the **Business Object** screen appears where you can view the details of the respective business object.
Owner	Indicates who has created the line item. The valid values are: • Framework • Base • Customer Modification

By default, the **Extendable Lookup Value** zone does not appear in the **Extendable Lookup** screen. It appears when you click the **Broadcast** (📡) icon corresponding to the line item in the **Extendable Lookup Value List** zone.

Related Topics

For more information on...	See...
How to edit a rate type	Editing a Rate Type on page 2928
How to copy a rate type	Copying a Rate Type on page 2930
How to delete a rate type	Deleting a Rate Type on page 2931
How to view the details of a rate type	Viewing the Rate Type Details on page 2932

Defining a Rate Type

Prerequisites

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To define a rate type, you should have:

- Billable charge line type and rate types defined in the application.

Procedure

To define a rate type:

1. Search for the **Rate Type** extendable lookup in the **Extendable Lookup Query** screen.
2. In the **Search Results** section, click the link in the **Description** column corresponding *t*o the extendable lookup business object whose details you want to view.
   The **Extendable Lookup** screen appears.
3. Click the **Add** button in the **Page Title** area of the **Extendable Lookup** screen.

   The **Rate Type** screen appears. It contains the following section:

   - **Main** - Used to specify basic details about the rate type. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Rate Type	Used to specify the rate type.	Yes
Description	Used to specify the description for the rate type.	Yes
Override Description	Used when you want to override the description of the rate type.	No
Detailed Description	Used to specify additional information about the rate type.	No
Status	Used to indicate the status of the rate type. The valid values are: • Active • Inactive **Note:** By default, the value is set to **Active**.	No
Line-Specific Calculation	Used to indicate whether the calculation of fees, percentage, or markup and markdown should take place for each and every claim charge or not. The valid values are: • Yes • No	Yes
Billable Charge Line Type	Used to indicate the billable charge line type using which you want to create the calculation line for the charge (i.e. line item). **Note:** The **Search** (🔍) icon appears corresponding to the **Billable Charge Line Type** field. On clicking the **Search** icon, the **Billable Charge Line Type Search** window appears. On specifying the value for a billable charge line type, the description of the billable charge line type appears corresponding to the **Billable Charge Line Type** field.	No

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- **Rate Type Usage** - Used to specify the usage of a rate type. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Applicable To	Used to indicate whether the rate type can be used while adding fees, default markup or markdown, or claim line items. The valid values are: • Claim Handling Fees • Claim Line Items • Markup or Markdown	Yes

4. Enter the required details in the **Main** section.
5. Select the required rate type usage (for the rate type) from the **Rate Type Usage** section.
6. If you want to define more than one rate type usage for the rate type, click the **Add** (+) icon and then repeat step 5.

> **Note:** However, if you want to remove a rate type usage from the rate type, click the **Delete** (🗑) icon corresponding to the **Applicable To** field.

7. Click **Save**.
   The rate type is added in the **C1-ExtLookRateType** extendable lookup.

Related Topics

For more information on...	See...
How to search for the **Rate Type** extendable lookup	Searching for the Rate Type Extendable Lookup on page 2923
Extendable Lookup screen	Extendable Lookup (Rate Type) on page 2924

Editing a Rate Type

Prerequisites

To edit a rate type, you should have:

- Billable charge line type and rate type usage defined in the application.

Procedure

To edit a rate type:

1. Search for the **Rate Type** extendable lookup in the **Extendable Lookup Query** screen.
2. In the **Search Results** section, click the link in the **Description** column corresponding *t*o the extendable lookup business object whose details you want to view.
   The **Extendable Lookup** screen appears.
3. In the **Extendable Lookup Value List** zone, click the **Edit** (✎) icon in the **Edit** column corresponding to the rate type whose details you want to edit.

   The **Rate Type** screen appears. It contains the following section:

   - **Main** - Used to specify basic details about the rate type. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Rate Type	Displays the rate type.	Not applicable

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Field Name	Field Description	Mandatory (Yes or No)
Description	Used to specify the description for the rate type.	Yes
Override Description	Used when you want to override the description of the rate type.	No
Detailed Description	Used to specify additional information about the rate type.	No
Status	Used to indicate the status of the rate type. The valid values are: • Active • Inactive	No
Line-Specific Calculation	Used to indicate whether the calculation of fees, percentage, or markup and markdown should take place for each and every claim charge or not. The valid values are: • Yes • No	Yes
Billable Charge Line Type	Used to indicate the billable charge line type using which you want to create the calculation line for the charge (i.e. line item). **Note:** The **Search** (🔍) icon appears corresponding to the **Billable Charge Line Type** field. On clicking the **Search** icon, the **Billable Charge Line Type Search** window appears. On specifying the value for a billable charge line type, the description of the billable charge line type appears corresponding to the **Billable Charge Line Type** field.	No

- **Rate Type Usage** - Used to specify the usage of a rate type. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Applicable To	Used to indicate whether the rate type can be used while adding fees, default markup or markdown, or claim line items. The valid values are: • Claim Handling Fees • Claim Line Items • Markup or Markdown	Yes

Tip: Alternatively, you can edit the details of a rate type by clicking the **Edit** button in the **Extendable Lookup Value** zone.

4. Modify the required details in the **Main** section, if required.
5. Add, edit, or remove usage (for the rate type) from the **Usage** section, if required.
6. If you want to define more than one rate type usage for the rate type, click the **Add** (+) icon and then repeat step 5.

Note: However, if you want to remove a rate type usage from the rate type, click the **Delete** (🗑) icon corresponding to the **Applicable To** field.

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7. Click **Save**.
   The changes made to the rate type are saved.

Related Topics

For more information on...	See...
How to search for the **Rate Type** extendable lookup	Searching for the Rate Type Extendable Lookup on page 2923
Extendable Lookup screen	Extendable Lookup (Rate Type) on page 2924
Extendable Lookup Value List zone	Extendable Lookup Value List on page 2924
Extendable Lookup Value zone	Extendable Lookup Value on page 2925

Copying a Rate Type

Instead of creating a rate type from scratch, you can create a new rate type using an existing rate type. This is possible through copying a rate type. On copying a rate type, the line specific calculation, billable charge type, and usage detailed are copied to the new rate type. You can then edit the details, if required.

Prerequisites

To copy a rate type, you should have:

- Rate type (whose copy you want to create) defined in the application.
- Billable charge line type and rate type usage defined in the application.

Procedure

To copy a rate type:

1. Search for the **Rate Type** extendable lookup in the **Extendable Lookup Query** screen.
2. In the **Search Results** section, click the link in the **Description** column corresponding *t*o the extendable lookup business object whose details you want to view.
   The **Extendable Lookup** screen appears.
3. In the **Extendable Lookup Value List** zone, click the **Duplicate** (⧉) icon in the **Duplicate** column corresponding to the rate type whose copy you want to create.

   The **Rate Type** screen appears. It contains the following section:

   - **Main** - Used to specify basic details about the rate type. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Rate Type	Used to specify the rate type.	Yes
Description	Used to specify the description for the rate type.	Yes
Override Description	Used when you want to override the description of the rate type.	No
Detailed Description	Used to specify additional information about the rate type.	No
Status	Used to indicate the status of the rate type. The valid values are: • Active • Inactive	No

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Field Name	Field Description	Mandatory (Yes or No)
Line-Specific Calculation	Used to indicate whether the calculation of fees, percentage, or markup and markdown should take place for each and every claim charge or not. The valid values are: • Yes • No	Yes
Billable Charge Line Type	Used to indicate the billable charge line type using which you want to create the calculation line for the charge (i.e. line item). **Note:** The **Search** (🔍) icon appears corresponding to the **Billable Charge Line Type** field. On clicking the **Search** icon, the **Billable Charge Line Type Search** window appears. On specifying the value for a billable charge line type, the description of the billable charge line type appears corresponding to the **Billable Charge Line Type** field.	No

- **Rate Type Usage** - Used to specify the usage of a rate type. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Applicable To	Used to indicate whether the rate type can be used while adding fees, default markup or markdown, or claim line items.	Yes

Tip: Alternatively, you can copy a rate type by clicking the **Duplicate** button in the **Extendable Lookup Value** zone.

4. Enter the required details in the **Main** section, if required.
5. Select the required rate type usage (for the rate type) from the **Rate Type Usage** section.
6. If you want to define more than one rate type usage for the rate type, click the **Add** (+) icon and then repeat step 5.

Note: However, if you want to remove a rate type usage from the rate type, click the **Delete** (🗑) icon corresponding to the **Applicable To** field.

7. Click **Save**.
   The new rate type is added in the **C1-ExtLookRateType** extendable lookup.

Related Topics

For more information on...	See...
How to search for the **Rate Type** extendable lookup	Searching for the Rate Type Extendable Lookup on page 2923
Extendable Lookup screen	Extendable Lookup (Rate Type) on page 2924
Extendable Lookup Value List zone	Extendable Lookup Value List on page 2924
Extendable Lookup Value zone	Extendable Lookup Value on page 2925

Deleting a Rate Type

Procedure

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To delete a rate type:

1. Search for the **Rate Type** extendable lookup in the **Extendable Lookup Query** screen.
2. In the **Search Results** section, click the link in the **Description** column corresponding to the extendable lookup business object whose details you want to view.
   The **Extendable Lookup** screen appears.
3. In the **Extendable Lookup Value List** zone, click the **Delete** (🗑) icon in the **Delete** column corresponding to the rate type that you want to delete.
   A message appears confirming whether you want to delete the rate type.

   Note: You can delete a rate type when it is not yet used in a pricing rule type.

   Tip: Alternatively, you can delete a rate type by clicking the **Delete** button in the **Extendable Lookup Value** zone.
4. Click **OK**.
   The rate type is deleted from the **C1-ExtLookRateType** extendable lookup.

Related Topics

For more information on...	See...
How to search for the **Rate Type** extendable lookup	Searching for the Rate Type Extendable Lookup on page 2923
Extendable Lookup screen	Extendable Lookup (Rate Type) on page 2924
Extendable Lookup Value List zone	Extendable Lookup Value List on page 2924
Extendable Lookup Value zone	Extendable Lookup Value on page 2925

Viewing the Rate Type Details

Procedure

To view the details of a rate type:

1. Search for the **Rate Option** extendable lookup in the **Extendable Lookup Query** screen.
2. In the **Search Results** section, click the link in the **Description** column corresponding to the *e*xtendable lookup business object whose details you want to view.
   The **Extendable Lookup** screen appears.
3. In the **Extendable Lookup Value List** zone, click the **Broadcast** (📡) icon corresponding to the rate option whose details you want to view.
   The **Extendable Lookup Value** zone appears.
4. View the details of the rate type in the **Extendable Lookup Value** zone.

Related Topics

For more information on...	See...
How to search for the **Rate Type** extendable lookup	Searching for the Rate Type Extendable Lookup on page 2923
Extendable Lookup screen	Extendable Lookup (Rate Type) on page 2924
Extendable Lookup Value List zone	Extendable Lookup Value List on page 2924
Extendable Lookup Value zone	Extendable Lookup Value on page 2925

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Pricing Group

Oracle Revenue Management and Billing enables you to create pricing groups for a bill group. It consists of one or more rules. Each rule has a unique priority. A rule contains one or more criteria. Each criterion can contain the following:

- **Source System** - Indicates the external system from where the claim or enrollment transaction is received.
- **Parameter 1**, **Parameter 2**, **Parameter 3**, and **Parameter 4** - Indicates employee attributes based on which you want to define the pricing.

Note that the source system and parameter 1 are mandatory when you are defining a criterion in a rule. In the **Parameter 1** field, you can only specify the employee attribute which is defined for the bill group and source system combination in the **Bill Group Derivation and Pricing Parameters** zone.

You can specify multiple parameter 2, parameter 3, and parameter 4 combinations in the criterion. You can also specify multiple source system, parameter 1, parameter 2, parameter 3, and parameter 4 combinations (i.e. multiple criteria) in a rule. Once a pricing group is defined for a bill group, you can then use the pricing group while defining a pricing rule for the bill group. This enables you to define various rates for employees with different set of attributes. For example, in a claim pricing rule, you can maintain different markup and markdown values for employees who belong to the Western, Eastern, and Central location of United States.

You can define, edit, copy, and delete a pricing group through the **Bill Group Pricing Groups** zone in the **Pricing** tab of the **Customer 360° Information** screen.

Viewing the Pricing Groups of a Bill Group

Procedure

To view the pricing groups of a bill group:

1. Search for the bill group whose is associated with the self-funded policy in the **Customer 360° View** screen.
2. In the **Search Results** section, click the **View** (🔗) icon corresponding to the bill group whose *d*etails you want to view.
   The **Person** tab appears in the **Customer 360° Information** screen.
3. Click the **Pricing Information** tab.
   The **Pricing Information** tab appears.
4. In the **Bill Group Self-Funded Policy Information** zone, click the **Broadcast** (📡) icon corresponding *t*o a bill group whose pricing groups you want to view.
   The **Bill Group Self-Funded Policy Pricing Rules** and **Bill Group Pricing Groups** zones appear.
5. View the pricing groups which are defined for the bill group and are currently active in the **Bill Group Pricing Groups** zone.

Related Topics

For more information on...	**See...**
How to search for a person	Searching for a Person on page 597
Customer 360° Information screen	Customer 360° Information on page 607
Pricing Information tab	Customer 360° Information - Pricing Information on page 641
Bill Group Self-Funded Policy Information zone	Bill Group Self-Funded Policy Information on page 648
Bill Group Pricing Groups zone	Bill Group Pricing Groups on page 653

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Defining a Pricing Group for a Bill Group

Prerequisites

To define a pricing group for a bill group, you should have:

- Values defined for the **C1-SourceSystemLookup** extendable lookup

Procedure

To define a pricing group for a bill group:

1. Search for the Administrative Services Only (ASO) person in the **Customer 360° View** screen.
2. In the **Search Results** section, click the **View** (🔗) icon corresponding to the person whose details you want *t*o view.
   The **Person** tab in the **Customer 360° Information** screen appears.
3. Click the **Pricing** tab.
   The **Pricing** tab appears.
4. In the **Bill Group ASO Policy Information** zone, click the **Broadcast** (📡) icon corresponding to a bill group for *w*hom you want to define a pricing group.
   The **Bill Group ASO Policy Pricing Rules** and **Bill Group Pricing Groups** zones appear.
5. Click the **Add** link in the upper right corner of the **Bill Group Pricing Groups** zone.

   The **Pricing Group** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details about the pricing group. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Bill Group Information	Indicates the bill group for whom you want to define the pricing group.	Not applicable
Status	Used to indicate the status of the pricing group. The valid values are: • Active • Inactive	Yes
Description	Used to specify the description for the pricing group.	Yes

   - **Pricing Group Rules** - Used to define rules in the pricing group. It contains the following fields in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Priority	Used to indicate the order in which the rule should be executed while determining the pricing for the price item. **Note:** You cannot define multiple rules in the pricing group with the same priority.	Yes
Rule	Used to specify the rule in the pricing group.	Yes
Description	Used to specify the description for the pricing group rule.	Yes
Criteria	On clicking the **Add** (📄) icon, you can define criteria for the pricing group rule.	Not applicable

6. Enter the required details in the **Main** section.
7. Define the required rules in the **Pricing Group Rules** section.
8. Click the **Add** (📄) icon in the **Criteria** field corresponding to the pricing group rule for which you want to *d*efine the criteria.

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The following fields appear in another grid:

Field Name	Field Description	Mandatory (Yes or No)
Source System	Used to indicate the external system from where the claim or enrollment transaction is received.	Yes
Parameter 1	Used to specify the employee attribute based on which you want to define the pricing. **Note:** You can only specify the employee attribute which is defined for the bill group and source system combination in the **Bill Group Derivation and Pricing Parameters** zone. You must not specify the ampersand (&) character in this field. The **Search** (🔍) icon appears corresponding to this field. On clicking the **Search** icon, the **Parameter 1 List for Bill Group** window appears.	Yes
Parameter 2	Used to specify the employee attribute based on which you want to define the pricing. **Note:** You must not specify the ampersand (&) character in this field.	No
Parameter 3	Used to specify the employee attribute based on which you want to define the pricing. **Note:** You must not specify the ampersand (&) character in this field.	No
Parameter 4	Used to specify the employee attribute based on which you want to define the pricing. **Note:** You must not specify the ampersand (&) character in this field.	No

9. Enter the source system and parameter 1 in the pricing group rule criteria.

> **Note:** You must define at least one rule in the pricing group and at least one source system and parameter 1 combination in the pricing group rule.

10. If required, enter the parameter 2, parameter 3, and parameter 4 for the source system and parameter 1 combination *i*n the pricing group rule criteria.
11. If you want to define more than one parameter 2, parameter 3, and parameter 4 for the source system and parameter 1 *c*ombination, click the **Add** (+) icon corresponding to the **Parameter 2** field and then repeat step 10.

> **Note:** However, if you want to remove a parameter 2, parameter 3, and parameter 4 from the source system and parameter 1 combination, click the **Delete** (🗑) icon corresponding to the parameter 2, parameter 3, and parameter 4.

12. If you want to define more than one source system and parameter 1 combination in the pricing group rule, click the **Add** (+) icon corresponding to the **Source System** field and then repeat step 9 and 10.

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> **Note:** However, if you want to remove a source system and parameter 1 combination from the pricing group rule, click the **Delete** (🗑) icon corresponding to the combination.

13. If you want to define more than one rule in the pricing group, click the **Add** (+) icon corresponding to the **Priority** field and then repeat the steps from 7 to 10.

> **Note:** However, if you want to remove a rule from the pricing group, click the **Delete** (🗑) icon corresponding to the pricing group rule.

14. Click **Save**.
    The pricing group is defined for the bill group.

Related Topics

For more information on...	See...
How to search for a person	Searching for a Person on page 597
Customer 360° Information screen	Customer 360° Information on page 607
Pricing tab	Customer 360° Information - Pricing Information on page 641
Bill Group ASO Policy Information zone	Bill Group Self-Funded Policy Information on page 648
Bill Group Pricing Groups zone	Bill Group Pricing Groups on page 653
Bill Group Derivation and Pricing Parameters zone	Bill Group Derivation and Pricing Parameters on page 616

Editing a Pricing Group of a Bill Group

Prerequisites

To edit a pricing group of a bill group, you should have:

- Values defined for the **C1-SourceSystemLookup** extendable lookup

Procedure

To edit a pricing group of a bill group:

1. Search for the Administrative Services Only (ASO) person in the **Customer 360° View** screen.
2. In the **Search Results** section, click the **View** (🔗) icon corresponding to the person whose details you want *t*o view.
   The **Person** tab in the **Customer 360° Information** screen appears.
3. Click the **Pricing** tab.
   The **Pricing** tab appears.
4. In the **Bill Group ASO Policy Information** zone, click the **Broadcast** (📡) icon corresponding to a bill group whose *p*ricing group you want to edit.
   The **Bill Group ASO Policy Pricing Rules** and **Bill Group Pricing Groups** zones appear.
5. In the **Bill Group Pricing Groups** zone, click the **Edit** (✎) icon in the **Edit** column corresponding to the *p*ricing group whose details you want to edit.

   The **Pricing Group** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details about the pricing group. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Bill Group Information	Indicates the bill group for whom you want to define the pricing group.	Not applicable

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Field Name	Field Description	Mandatory (Yes or No)
Status	Used to indicate the status of the pricing group. The valid values are: • Active • Inactive	Yes
Description	Used to specify the description for the pricing group.	Yes

- **Pricing Group Rules** - Used to define rules in the pricing group. It contains the following fields in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Priority	Used to indicate the order in which the rule should be executed while determining the pricing for the price item. **Note:** You cannot define multiple rules in the pricing group with the same priority.	Yes
Rule	Used to specify the rule in the pricing group.	Yes
Description	Used to specify the description for the pricing group rule.	Yes
Criteria	On clicking the **Add** (+) icon, you can define criteria for the pricing group rule.	Not applicable

Note: You cannot define, edit, or remove a rule when the pricing group is already used while defining a pricing rule for the bill group.

6. Modify the required details in the **Main** section.
7. Edit the required rules in the **Pricing Group Rules** section.
8. Click the **Add** (+) icon in the **Criteria** field corresponding to the pricing group rule for which you want to *e*dit the criteria.

   The following fields appear in another grid:

Field Name	Field Description	Mandatory (Yes or No)
Source System	Used to indicate the external system from where the claim or enrollment transaction is received.	Yes
Parameter 1	Used to specify the employee attribute based on which you want to define the pricing. **Note:** You can only specify the employee attribute which is defined for the bill group and source system combination in the **Bill Group Derivation and Pricing Parameters** zone. You must not specify the ampersand (&) character in this field. The **Search** (🔍) icon appears corresponding to this field. On clicking the **Search** icon, the **Parameter 1 List for Bill Group** window appears.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
Parameter 2	Used to specify the employee attribute based on which you want to define the pricing. **Note:** You must not specify the ampersand (&) character in this field.	No
Parameter 3	Used to specify the employee attribute based on which you want to define the pricing. **Note:** You must not specify the ampersand (&) character in this field.	No
Parameter 4	Used to specify the employee attribute based on which you want to define the pricing. **Note:** You must not specify the ampersand (&) character in this field.	No

Note: You cannot define, edit, or remove the source system, parameter 1, parameter 2, parameter 3, and parameter 4 from a rule when the pricing group is already used while defining a pricing rule for the bill group.

9. If required, enter the source system and parameter 1 in the pricing group rule criteria.

Note: You must define at least one rule in the pricing group and at least one source system and parameter 1 combination in the pricing group rule.

10. If required, enter the parameter 2, parameter 3, and parameter 4 for the source system and parameter 1 combination in the pricing group rule criteria.
11. If you want to define more than one parameter 2, parameter 3, and parameter 4 for the source system and parameter 1 combination, click the **Add** (+) icon corresponding to the **Parameter 2** field and then repeat step 10.

Note: However, if you want to remove a parameter 2, parameter 3, and parameter 4 from the source system and parameter 1 combination, click the **Delete** (🗑) icon corresponding to the parameter 2, parameter 3, and parameter 4.

12. If you want to define more than one source system and parameter 1 combination in the pricing group rule, click the **Add** (+) icon corresponding to the **Source System** field and then repeat step 9 and 10.

Note: However, if you want to remove a source system and parameter 1 combination from the pricing group rule, click the **Delete** (🗑) icon corresponding to the combination.

13. If you want to define more than one rule in the pricing group, click the **Add** (+) icon corresponding to the **Priority** field and then repeat the steps from 7 to 10.

Note: However, if you want to remove a rule from the pricing group, click the **Delete** (🗑) icon corresponding to the pricing group rule.

14. Click **Save**.
    The changes made to the pricing group are saved.

Related Topics

For more information on...	See...
How to search for a person	Searching for a Person on page 597
Customer 360° Information screen	Customer 360° Information on page 607

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For more information on...	See...
Pricing tab	Customer 360° Information - Pricing Information on page 641
Bill Group ASO Policy Information zone	Bill Group Self-Funded Policy Information on page 648
Bill Group Pricing Groups zone	Bill Group Pricing Groups on page 653
Bill Group Derivation and Pricing Parameters zone	Bill Group Derivation and Pricing Parameters on page 616

Deleting a Pricing Group of a Bill Group

Procedure

To delete a pricing group of a bill group:

1. Search for the Administrative Services Only (ASO) person in the **Customer 360° View** screen.
2. In the **Search Results** section, click the **View** (🔗) icon corresponding to the person whose details you want *t*o view.
   The **Person** tab in the **Customer 360° Information** screen appears.
3. Click the **Pricing** tab.
   The **Pricing** tab appears.
4. In the **Bill Group ASO Policy Information** zone, click the **Broadcast** (📡) icon corresponding to a bill group whose *p*ricing group you want to delete.
   The **Bill Group ASO Policy Pricing Rules** and **Bill Group Pricing Groups** zones appear.
5. In the **Bill Group Pricing Groups** zone, click the **Delete** (🗑) icon in the **Delete** column corresponding to the *p*ricing group that you want to delete.

   A message appears confirming whether you want to delete the pricing group.

   Note: You can delete a pricing group when it is not yet used while defining a pricing rule for the bill group.
6. Click **OK**.
   The pricing group is deleted.

Related Topics

For more information on...	See...
How to search for a person	Searching for a Person on page 597
Customer 360° Information screen	Customer 360° Information on page 607
Pricing tab	Customer 360° Information - Pricing Information on page 641
Bill Group ASO Policy Information zone	Bill Group Self-Funded Policy Information on page 648
Bill Group Pricing Groups zone	Bill Group Pricing Groups on page 653

Copying a Pricing Group of a Bill Group

Instead of creating a pricing group from scratch, you can create a new pricing group using an existing pricing group. This is possible through copying a pricing group. On copying a pricing group, the details including the rules are copied to the new pricing group. You can then edit the details, if required.

Prerequisites

To copy a pricing group of a bill group, you should have:

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- Pricing group (whose copy you want to create) defined in the application
- Values defined for the **C1-SourceSystemLookup** extendable lookup

Procedure

To copy a pricing group of a bill group:

1. Search for the Administrative Services Only (ASO) person in the **Customer 360° View** screen.
2. In the **Search Results** section, click the **View** (🔗) icon corresponding to the person whose details you want *t*o view.
   The **Person** tab in the **Customer 360° Information** screen appears.
3. Click the **Pricing** tab.
   The **Pricing** tab appears.
4. In the **Bill Group ASO Policy Information** zone, click the **Broadcast** (📡) icon corresponding to a bill group whose *p*ricing group you want to copy.
   The **Bill Group ASO Policy Pricing Rules** and **Bill Group Pricing Groups** zones appear.
5. In the **Bill Group Pricing Groups** zone, click the **Duplicate** (📋) icon in the **Duplicate** column *c*orresponding to the pricing group whose copy you want to create.

   The **Pricing Group** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details about the pricing group. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Bill Group Information	Indicates the bill group for whom you want to define the pricing group.	Not applicable
Status	Used to indicate the status of the pricing group. The valid values are: • Active • Inactive	Yes
Description	Used to specify the description for the pricing group.	Yes

   - **Pricing Group Rules** - Used to define rules in the pricing group. It contains the following fields in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Priority	Used to indicate the order in which the rule should be executed while determining the pricing for the price item. **Note:** You cannot define multiple rules in the pricing group with the same priority.	Yes
Rule	Used to specify the rule in the pricing group.	Yes
Description	Used to specify the description for the pricing group rule.	Yes
Criteria	On clicking the **Add** (📄) icon, you can define criteria for the pricing group rule.	Not applicable

6. Enter the required details in the **Main** section.
7. Define, edit, or remove the required rules from the **Pricing Group Rules** section.
8. Click the **Add** (📄) icon in the **Criteria** field corresponding to the pricing group rule for which you want to *d*efine or edit the criteria.

   The following fields appear in another grid:

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Field Name	Field Description	Mandatory (Yes or No)
Source System	Used to indicate the external system from where the claim or enrollment transaction is received.	Yes
Parameter 1	Used to specify the employee attribute based on which you want to define the pricing. **Note:** You can only specify the employee attribute which is defined for the bill group and source system combination in the **Bill Group Derivation and Pricing Parameters** zone. You must not specify the ampersand (&) character in this field. The **Search** (🔍) icon appears corresponding to this field. On clicking the **Search** icon, the **Parameter 1 List for Bill Group** window appears.	Yes
Parameter 2	Used to specify the employee attribute based on which you want to define the pricing. **Note:** You must not specify the ampersand (&) character in this field.	No
Parameter 3	Used to specify the employee attribute based on which you want to define the pricing. **Note:** You must not specify the ampersand (&) character in this field.	No
Parameter 4	Used to specify the employee attribute based on which you want to define the pricing. **Note:** You must not specify the ampersand (&) character in this field.	No

9. Enter the source system and parameter 1 in the pricing group rule criteria.

> **Note:** You must define at least one rule in the pricing group and at least one source system and parameter 1 combination in the pricing group rule.

10. If required, enter the parameter 2, parameter 3, and parameter 4 for the source system and parameter 1 combination in the pricing group rule criteria.
11. If you want to define more than one parameter 2, parameter 3, and parameter 4 for the source system and parameter 1 combination, click the **Add** (+) icon corresponding to the **Parameter 2** field and then repeat step 10.

> **Note:** However, if you want to remove a parameter 2, parameter 3, and parameter 4 from the source system and parameter 1 combination, click the **Delete** (🗑) icon corresponding to the parameter 2, parameter 3, and parameter 4.

12. If you want to define more than one source system and parameter 1 combination in the pricing group rule, click the **Add** (+) icon corresponding to the **Source System** field and then repeat step 9 and 10.

> **Note:** However, if you want to remove a source system and parameter 1 combination from the pricing group rule, click the **Delete** (🗑) icon corresponding to the combination.

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13. If you want to define more than one rule in the pricing group, click the **Add** (+) icon corresponding to the **Priority** field and then repeat the steps from 7 to 10.

> **Note:** However, if you want to remove a rule from the pricing group, click the **Delete** (🗑) icon corresponding to the pricing group rule.

14. Click **Save**.
    The new pricing group is defined for the bill group.

Related Topics

For more information on...	See...
How to search for a person	Searching for a Person on page 597
Customer 360° Information screen	Customer 360° Information on page 607
Pricing tab	Customer 360° Information - Pricing Information on page 641
Bill Group ASO Policy Information zone	Bill Group Self-Funded Policy Information on page 648
Bill Group Pricing Groups zone	Bill Group Pricing Groups on page 653
Bill Group Derivation and Pricing Parameters zone	Bill Group Derivation and Pricing Parameters on page 616

Pricing Rule Type

Oracle Revenue Management and Billing enables you to define a pricing rule type using which you can create a pricing rule. Through this screen you can define the following pricing rule types:

- **Claim**
- **Specific Stop-Loss (SSL)**
- **Aggregate Stop-Loss (ASL)**
- **Retention Type Claim Based**
- **Retention Type Enrollment Based**
- **Flat Fee**
- **Ancillary**
- **Discount Arrangement**
- **Level Funded**
- **Minimum Premium Pricing**
- **Age Based**
- **Tier Based**
- **Pass-Through Billable Charge**
- **Additional Fee**
- **Benefit**
- **Discount Charge**

This screen consists of the following zones:

- Pricing Rule Type List on page 2943
- Pricing Rule Type on page 2946

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Pricing Rule Type List

The **Pricing Rule Type List** zone lists the pricing rule types that are already defined in the system. It contains the following columns:

Column Name	Column Description
Pricing Rule Type	Displays the pricing rule type.
Description	Displays the description of the pricing rule type.
Pricing Rule Type Category	Indicates the category to which the pricing rule type belongs. The valid values are: • Claim • Specific Stop-Loss • Aggregate Stop-Loss • Retention Type Claim Based • Retention Type Enrollment Based • Flat Fees • Ancillary • Discount Arrangement • Discount Charge • Level Funded • Age Based • Tier Based • Pass-Through Billable Charge • Benefit • Additional Fee • Minimum Pricing Rule Type
Edit	On clicking the **Edit** (✎) icon, the **Claim Pricing Rule Type**, **Specific Stop-Loss (SSL) Pricing Rule Type**, **Aggregate Stop-Loss (ASL) Pricing Rule Type**, **Retention Type Claim Based Pricing Rule Type**, **Retention Type Enrollment Based Pricing Rule Type**, **Flat Fees Pricing Rule Type**, **Ancillary Pricing Rule Type**, **Discount Arrangement Pricing Rule Type**, **Discount Charge Pricing Rule Type**, **Level Funded Pricing Rule Type**, **Age Based Pricing Rule Type**, **Tier Based Pricing Rule Type**, **Pass-Through Billable Charge Pricing Rule Type**, **Benefit Pricing Rule Type**, **Additional Fee Pricing Rule Type**, or **Minimum Pricing Rule Type** screen appears, based on the pricing rule type category, where you can edit the details of the respective pricing rule type.
Delete	On clicking the **Delete** (🗑) icon, you can delete the pricing rule type. **Note:** You can delete a pricing rule type when it is not yet used in the system.

Note: Pagination is used to display limited number of records in this zone. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

On clicking the **Broadcast** (📡) icon corresponding to a pricing rule type, the **Pricing Rule Type** zone appears with the details of the respective pricing rule type.

You can filter the list using the **Pricing Rule Type Category** field available in the **Filter** area. By default, the **Filter** area is hidden. You can view the **Filter** area by clicking the **Filters** (▽) icon in the upper right corner of this zone.

Related Topics

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For more information on...	See...
How to edit a claim pricing rule type	Editing a Claim Pricing Rule Type on page 2980
How to delete a claim pricing rule type	Deleting a Claim Pricing Rule Type on page 2983
How to view the details of a claim pricing rule type	Viewing the Claim Pricing Rule Type Details on page 2983
How to edit a specific stop-loss pricing rule type	Editing a Specific Stop-Loss (SSL) Pricing Rule Type on page 3012
How to delete a specific stop-loss pricing rule type	Deleting a Specific Stop-Loss (SSL) Pricing Rule Type on page 3014
How to view the details of a specific stop-loss pricing rule type	Viewing the Specific Stop-Loss (SSL) Pricing Rule Type Details on page 3015
How to edit an aggregate stop-loss pricing rule type	Editing an Aggregate Stop-Loss (ASL) Pricing Rule Type on page 3046
How to delete an aggregate stop-loss pricing rule type	Deleting an Aggregate Stop-Loss (ASL) Pricing Rule Type on page 3048
How to view the details of an aggregate stop-loss pricing rule type	Viewing the Aggregate Stop-Loss (ASL) Pricing Rule Type Details on page 3049
How to edit a retention type claim based pricing rule type	Editing a Retention Type Claim Based Pricing Rule Type on page 3077
How to delete a retention type claim based pricing rule type	Deleting a Retention Type Claim Based Pricing Rule Type on page 3079
How to view the details of a retention type claim based pricing rule type	Viewing the Retention Type Claim Based Pricing Rule Type Details on page 3080
How to edit a retention type enrollment based pricing rule type	Editing a Retention Type Enrollment Based Pricing Rule Type on page 3103
How to delete a retention type enrollment based pricing rule type	Deleting a Retention Type Enrollment Based Pricing Rule Type on page 3105
How to view the details of a retention type enrollment based pricing rule type	Viewing the Retention Type Enrollment Based Pricing Rule Type Details on page 3106
How to edit a one-time flat fee pricing rule type	Editing a One-Time Flat Fee Pricing Rule Type on page 3130
How to delete a one-time flat fee pricing rule type	Deleting a One-Time Flat Fee Pricing Rule Type on page 3133
How to view the details of a one-time flat fee pricing rule type	Viewing the One-Time Flat Fee Pricing Rule Type Details on page 3133
How to edit a bill period based recurring flat fee pricing rule type	Editing a Bill Period Based Recurring Flat Fee Pricing Rule Type on page 3144
How to delete a bill period based recurring flat fee pricing rule type	Deleting a Bill Period Based Recurring Flat Fee Pricing Rule Type on page 3147
How to view the details of a bill period based recurring flat fee pricing rule type	Viewing the Bill Period Based Recurring Flat Fee Pricing Rule Type Details on page 3147
How to edit a frequency based recurring flat fee pricing rule type	Editing a Frequency Based Recurring Flat Fee Pricing Rule Type on page 3158

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For more information on...	See...
How to delete a frequency based recurring flat fee pricing rule type	Deleting a Frequency Based Recurring Flat Fee Pricing Rule Type on page 3161
How to view the details of a frequency based recurring flat fee pricing rule type	Viewing the Frequency Based Recurring Flat Fee Pricing Rule Type Details on page 3161
How to edit an ancillary pricing rule type	Editing an Ancillary Pricing Rule Type on page 3193
How to delete an ancillary pricing rule type	Deleting an Ancillary Pricing Rule Type on page 3196
How to view the details of an ancillary pricing rule type	Viewing the Ancillary Pricing Rule Type Details on page 3197
How to edit a discount arrangement pricing rule type	Editing a Discount Arrangement Pricing Rule Type on page 3229
How to delete a discount arrangement pricing rule type	Deleting a Discount Arrangement Pricing Rule Type on page 3232
How to view the details of a discount arrangement pricing rule type	Viewing the Discount Arrangement Pricing Rule Type Details on page 3232
How to edit a level funded pricing rule type	Editing a Level Funded Pricing Rule Type on page 3262
How to delete a level funded pricing rule type	Deleting a Level Funded Pricing Rule Type on page 3264
How to view the details of a level funded pricing rule type	Viewing the Level Funded Pricing Rule Type Details on page 3264
How to edit an age based pricing rule type	Editing an Age Based Pricing Rule Type on page 3389
How to delete an age based pricing rule type	Deleting an Age Based Pricing Rule Type on page 3391
How to view the details of an age based pricing rule type	Viewing the Age Based Pricing Rule Type Details on page 3392
How to edit a tier based pricing rule type	Editing a Tier Based Pricing Rule Type on page 3405
How to delete a tier based pricing rule type	Deleting a Tier Based Pricing Rule Type on page 3407
How to view the details of a tier based pricing rule type	Viewing the Tier Based Pricing Rule Type Details on page 3408
How to edit a pass-through billable charge pricing rule type	Editing a Pass-Through Billable Charge Pricing Rule Type on page 3417
How to delete a pass-through billable charge pricing rule type	Deleting a Pass-Through Billable Charge Pricing Rule Type on page 3419
How to view the details of a pass-through billable charge pricing rule type	Viewing the Pass-Through Billable Charge Pricing Rule Type Details on page 3419
How to edit the details of an additional fee pricing rule type	Editing an Additional Fee Pricing Rule Type on page 3431

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For more information on...	See...
How to delete the details of an additional fee pricing rule type	Deleting an Additional Fee Pricing Rule Type on page 3433
How to view the details of an additional fee pricing rule type	Viewing the Additional Fee Pricing Rule Type Details on page 3433
How to view the details of a benefit pricing rule type	Viewing the Benefit Pricing Rule Type Details on page 3446
How to edit the details of a benefit pricing rule type	Editing a Benefit Pricing Rule Type on page 3444
How to delete the details of a benefit pricing rule type	Deleting a Benefit Pricing Rule Type on page 3445
How to edit a discount charge pricing rule type	Editing a Discount Charge Pricing Rule Type on page 3458
How to delete a discount charge pricing rule type	Deleting a Discount Charge Pricing Rule Type on page 3460
How to view the details of a discount charge pricing rule type	Viewing the Discount Charge Pricing Rule Type Details on page 3460

Pricing Rule Type

The **Pricing Rule Type** zone displays the details of the pricing rule type for claim, aggregate stop-loss, specific stop-loss, retention type enrollment based, retention type claim based, one-time flat fee, bill period based recurring flat fee, and frequency based recurring flat fee. This zone contains the following sections:

- **Main** - This section provides basic information about the pricing rule type. It contains the following fields:

Field Name	Field Description
Pricing Rule Type	Displays the pricing rule type.
Description	Displays the description for the pricing rule type.
Detailed Description	Displays additional information about the pricing rule type category.
Pricing Rule Business Object	Indicates the pricing rule business object. In addition, a context menu appears corresponding to this field which helps in navigating to other screens in the application. The valid values are: • Claim Pricing Rule • Aggregate Stop-Loss (ASL) Pricing Rule • Specific Stop-Loss (SSL) Pricing Rule • Retention Type Claim Based Pricing Rule • Retention Type Enrollment Based Pricing Rule • Flat Fee Pricing Rule • Ancillary Pricing Rule • Discount Arrangement Pricing Rule • Level Funded (LF) Pricing Rule • Minimum Premium Program Pricing Rule

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Field Name	Field Description
	Note: It has a link. On clicking the link, the **Business Object** screen appears where you can view the details of the respective business object.
Business Object	Indicates the pricing rule type business object. In addition, a context menu appears corresponding to this field which helps in navigating to other screens in the application. The valid values are: • Claim Pricing Rule Type • Aggregate Stop-Loss (ASL) Pricing Rule Type • Specific Stop-Loss (SSL) Pricing Rule Type • Retention Type Claim Based Pricing Rule Type • Retention Type Enrollment Based Pricing Rule Type • Flat Fee Pricing Rule Type • Ancillary Pricing Rule Type • Discount Arrangement Pricing Rule Type • Level Funded (LF) Pricing Rule Type • Minimum Premium Program Pricing Rule Type
	Note: It has a link. On clicking the link, the **Business Object** screen appears where you can view the details of the respective business object.
Status	Indicates the status of the pricing rule type. The valid values are: • Active • Inactive
Primary	Displays whether the pricing rule type is primary or not.
Pricing Rule Type Category	Indicates the pricing rule type category for the pricing rule type. The valid values are: • Claim • Aggregate Stop-Loss • Specific Stop-Loss • Retention Type Claim Based • Retention Type Enrollment Based • Flat Fees • Ancillary • Discount Arrangement • Level Funded • Minimum Premium Program

- **Related Pricing Rule Types** - This section lists the pricing rule types which are related to the parent pricing rule type. It contains the following columns:

Column Name	Column Description
Sequence	Displays the order in which pricing rule type is executed.
Pricing Rule Type	Displays the related pricing rule type for the parent rule type.
	Note: It has a link. On clicking the link, the **Pricing Rule Type** screen appears where you can view the details of the respective pricing rule type.
Eligibility Rule Type	Indicates the rule type eligibility for the related pricing rule type.

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Column Name	Column Description
	Note: It has a link. On clicking the link, the **Rule Type** screen appears where you can view the eligibility details of the respective pricing rule type.

Note: This section appears when the pricing rule type is a primary pricing rule type.

- **Transaction Field Mapping** - This section displays the transaction related data mapped to the pricing rule type. It contains the following fields:

Field Name	Field Description
Source System	Displays the external system from where the transaction data is mapped.
Parameter 1 ... Parameter 4	Displays the parameters mapped for the transactions.
Incurred Date	Displays the date incurred for transaction.
Paid Date	Displays the transaction paid date.
Source of Funds	Displays the source of funds used to make the payment.
Composite	Displays the composite transaction data.
Claim Disposition	Displays the disposition of the claims transaction.
Provider's Tax Identification Number	Displays the tax identification number of the provider.
Member ID	Displays the member ID.
Main Subscriber ID	Displays the customer ID.
Run-in Identifier	Displays the run-in identifier.
Runout Identifier	Displays the runout identifier.
Coverage Start Date	Displays the transaction coverage start date.
Coverage End Date	Displays the transaction coverage end date.
Retroactivity Indicator	Displays information of the retroactivity indicator.

Note: This section appears when the pricing rule type is a primary pricing rule type.

- **Algorithms** - This section displays the algorithms used for the pricing rule type. It contains the following columns:

Column Name	Column Description
System Event	Indicates the system event on which the algorithm must be executed. The valid values are: • Account and Price Item Derivation • Account and Price Item Derivation Post-Processing • Accumulation Billable Charge Post-Processing • Accumulation Billable Charge Pre-Processing • Accumulation Post-Processing • Accumulation Pre-Processing • Bill After Date Determination • Bill Group Derivation • Billable Charge Creation Post-Processing • Billable Charge Creation Pre-Processing

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Column Name	Column Description
	• Final Settlement Derivation • New Born Waiver Calculation • Premium Calculation • Pricing Rule Derivation • Pricing Rule Post-Processing • Pricing Rule Pre-Processing • Pricing Rule Proration Amount Calculation • Skip Month Premium Calculation • Transaction Validation
Sequence	Displays the order in which the algorithms for each system event must be executed.
Algorithm	Displays the algorithm. **Note:** It has a link. On clicking the link, the **Algorithm** screen appears with the details of the respective algorithm.

- **Additional Data** - This section displays the additional information about the pricing rule type. It contains the following fields:

Field Name	Field Description
Eligible for Level Funding	Indicates whether the pricing rule type is eligible for level funding or not. The valid values are: • Yes • No
Eligible for Specific Stop-Loss	Indicates whether the pricing rule type is eligible for specific stop-loss or not. The valid values are: • Yes • No **Note:** This field appears when the option selected for the **Pricing Rule Type Category** is **Claim**, **Retention Type Claim Based**, or **Retention Type Enrollment Based**.
Eligible for Minimum Premium Program	Indicates whether the pricing rule type is eligible for minimum premium program or not. The valid values are: • Yes • No **Note:** This field appears when the option selected for the **Pricing Rule Type Category** is
Run-in Identifier Value	Displays the value for run-in identifier.
Runout Identifier Value	Displays the value for runout identifier.

Note: This section does not appear when the pricing rule type category is flat fees.

- **Price Items** - This section displays the price items assigned to the pricing rule type. It contains the following columns:

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<table>
<tr><th>Column Name</th><th>Column Description</th></tr>
<tr><td>Price Item</td><td>Displays the price item information.

Note: It has a link. On clicking the link, the Price Item screen appears where you can view the details of the respective price item.</td></tr>
<tr><td>Rate Option</td><td>On clicking the Add () icon, the following column appears:

<table><tr><th>Column Name</th><th>Column Description</th></tr><tr><td>Rate Option</td><td>Indicates the rate option for the price item.</td></tr></table>
Note: This column does not appear when the pricing rule type category is flat fees.</td></tr>
<tr><td>Bill To Account</td><td>On clicking the Add () icon, the following columns appear:

<table><tr><th>Column Name</th><th>Column Description</th></tr><tr><td>Priority</td><td>Displays the order in which the invoice type was considered while defining a price item.</td></tr><tr><td>Invoice Type</td><td>Displays the invoice type for the price item.</td></tr></table></td></tr>
<tr><td>Eligibility Rule Type</td><td>Indicates the rule type which indicates the rules that should be executed to determine whether the price item is eligible for billing.

Note: It has a link. On clicking the link, the Rule Type screen appears where you can view the eligibility details of the respective pricing rule type.</td></tr>
</table>

- **Price Item Parameters** - This section displays the price item parameters in the pricing rule type. It contains the following columns:

<table>
<tr><th>Column Name</th><th>Column Description</th></tr>
<tr><td>Price Item Parameter</td><td>Displays the parameter associated with the price item.

Note: It has a link. On clicking the link, the Parameter screen appears where you can view the details of the respective parameter.</td></tr>
<tr><td>Transaction Field</td><td>Displays the additional transaction data.

Note:
It has a link. On clicking the link, the Field screen appears where you can view the details of the respective transaction field.
This column does not appear when the pricing rule type category is flat fees.</td></tr>
<tr><td>Eligible for Specific Stop-Loss</td><td>Displays the parameter eligible for Specific Stop-Loss when the eligibility checkbox was checked.

Note: This field appears only when the option selected for the Pricing Rule Type Category is Claim, Retention Type Claim Based, or Retention Type Enrollment Based.</td></tr>
</table>

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Column Name	Column Description
Eligible for Level Funding	Displays the parameter eligible for level funding when the eligibility checkbox was checked.

- **Characteristics** - This section displays the pricing rule type characteristics. It contains the following columns:

Column Name	Column Description
Characteristic Type	Indicates the characteristic type.
Characteristic Value	Displays the value for the characteristic type.

- **Event Management** - This section displays the audit event details. It contains the following columns:

Column Name	Column Description
Audit Event Type	Displays the audit event type which you can use while adding elements for audit in a fully-insured benefit pricing rule type.
Element Type	Indicates the type of audit element for a fully-insured benefit pricing rule type. The valid values are: • Business Object Status • Characteristic • Field
Element Name	Displays the element name for a fully-insured benefit pricing rule type.
Element Value	Displays the value for an element name.

- **Claim Templates** - This section list the pricing rule type for claim template. It contains the following field:

Field Name	Field Description
Claim Template	Indicates the claim template.

Note: This section appears when the **Business Object** is **Claim Pricing Rule Type**.

- **Claim-Specific Additional Data** - This section displays the claim specific additional data. It contains the following fields:

Field Name	Field Description
Rule Based Billing Eligibility Field	Displays whether the rule based field is eligible for billing or not.
	Note: It has a link. On clicking the link, the **Field** screen appears where you can view the details of the respective field.
Rule Based Markup or Markdown Eligibility Field	Displays whether the rule based markup or markdown field is eligible for billing or not.
	Note: It has a link. On clicking the link, the **Field** screen appears where you can view the details of the respective field.
Markup or Markdown Billable Charge Line Type	Displays the markup or markdown billable charge line type.

Note: This section appears when the **Business Object** is **Claim Pricing Rule Type**.

- **ASL-Specific Additional Data** - This section displays the Aggregated Stop-Loss specific additional data. It contains the following fields:

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Field Name	Field Description
ASL Billable Charge Line Type	Displays the Aggregated Stop-Loss billable charge line type.
Domestic Provider Claim Billable Charge Line Type	Displays the claim billable charge line type for domestic provider.
Rule Based Domestic Provider Claim Eligibility Field	Displays the rule based domestic provider for claim eligibility field.
ASL Limit Price Item	Displays the Aggregated Stop-Loss limit price item.
Rule Based Billing Eligibility Field	Displays whether the rule based field is eligible for billing or not. **Note:** It has a link. On clicking the link, the **Field** screen appears where you can view the details of the respective field.
Rule Based Markup or Markdown Eligibility Field	Displays whether the rule based markup or markdown field is eligible for billing or not. **Note:** It has a link. On clicking the link, the **Field** screen appears where you can view the details of the respective field.
Markup or Markdown Billable Charge Line Type	Displays the markup or markdown billable charge line type.

Note: This section appears when the **Business Object** is **Aggregate Stop-Loss (ASL) Pricing Rule Type**.

- **Enrollment-Specific Additional Data** - This section displays the enrollment specific additional data. It contains the following fields:

Field Name	Field Description
Retroactivity Indicator Value	Displays the value for the retroactivity indicator.

Note: This section appears when the **Business Object** is **Retention Type Enrollment Based Pricing Rule Type**.

- **Claim Disposition Details** - This section displays the details of claim disposition. It contains the following columns:

Column Name	Column Description
Claim Disposition	Indicates the claim disposition.
Disposition Mode	Indicates the claim disposition mode. The valid values are: • Align Signage • Zero Out

Note: This section appears when the **Business Object** is **Retention Type Claim Based Pricing Rule Type**.

- **SSL-Specific Additional Data** - This section displays the Specific Stop-Loss additional data. It contains the following fields:

Field Name	Field Description
SSL Billable Charge Line Type	Displays the Specific Stop-Loss billable charge line type.
Domestic Provider Claim Billable Charge Line Type	Displays the claim billable charge line type for domestic provider.

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Field Name	Field Description
Rule Based Domestic Provider Claim Eligibility Field	Displays the rule based domestic provider for claim eligibility field.
Rule Based Billing Eligibility Field	Displays whether the rule based field is eligible for billing or not. **Note:** It has a link. On clicking the link, the **Field** screen appears where you can view the details of the respective field.
Rule Based Markup or Markdown Eligibility Field	Displays whether the rule based markup or markdown field is eligible for billing or not. **Note:** It has a link. On clicking the link, the **Field** screen appears where you can view the details of the respective field.
Markup or Markdown Billable Charge Line Type	Displays the markup or markdown billable charge line type.

Note: This section appears when the **Business Object** is **Specific Stop-Loss (SSL) Pricing Rule Type**.

- **Billable Charge Line Types** - This section list the billable charge line type. It contains the following column:

Column Name	Column Description
Billable Charge Line Type	Indicates the billable charge line type.

Note: This section appears when the **Business Object** is **Flat Fees Pricing Rule Type**.

- **Flat Fees - Specific Additional Data** - This section displays the recurring flat fee that is specific and considered as additional data. It contains the following fields:

Field Name	Field Description
Bill Segment Cancel Reason	Indicates the reason for cancelling the bill segment.
Recurring Fee	Displays whether the recurring flat fee is required or not.
Recurring Method	Indicates the recurring method if recurring fee is required. The valid values are: • Bill Period • Frequency **Note:** This field appears when the checkbox for **Recurring Fee** field is selected.

Note: This section appears when the **Business Object** is **Flat Fees Pricing Rule Type**.

This section contains the following sub-section:

- **Bill Periods** - This section displays the bill period for the recurring flat fee. It contains the following column:

Column Name	Column Description
Bill Period	Indicates the bill period.

Note: This section appears when the **Recurring Method** is **Bill Period**.

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- **Additional Fee Indicator** - This section displays the additional fees which are applicable to one or more line items in the claim pricing rule. It contains the following fields:

Column Name	Column Description
Fee	Indicates the charge type category for the claim pricing rule.
Claim Additional Fee Indicator	Indicates the charge type sub category for the claim pricing rule.

Note: This section appears when the **Business Object** is **Claim Pricing Rule Type**.

- **Minimum Premium Program - Specific Additional Data** -

Column Name	Column Description

- **Record Actions** - This section contains the following buttons:

Button Name	Button Description
Edit	Used to edit the details of the pricing rule type.
Delete	Used to delete the pricing rule type.

- **Record Information** - This section contains the following fields:

Field Name	Field Description
Business Object	Indicates the business object using which the extendable lookup value for pricing rule type is created. In addition, a context menu appears corresponding to this field which helps in navigating to other screens in the application. **Note:** It has a link. On clicking the link, the **Business Object** screen appears with the details of the respective business object.

By default, the **Pricing Rule Type** zone does not appear in the **Pricing Rule Type** screen. It appears when you click the **Broadcast** (📡) icon corresponding to the pricing rule type in the **Pricing Rule Type List** zone.

Related Topics

For more information on...	See...
Pricing Rule Type screen	Pricing Rule Type on page 2942
Pricing Rule Type List zone	Pricing Rule Type List on page 2943
How to edit the claim pricing rule type	Editing a Claim Pricing Rule Type on page 2980
How to edit the specific stop-loss pricing rule type	Editing a Specific Stop-Loss (SSL) Pricing Rule Type on page 3012
How to edit the aggregate stop-loss pricing rule type	Editing an Aggregate Stop-Loss (ASL) Pricing Rule Type on page 3046
How to edit the retention type claim based pricing rule type	Editing a Retention Type Claim Based Pricing Rule Type on page 3077
How to edit the retention type enrollment based pricing rule type	Editing a Retention Type Enrollment Based Pricing Rule Type on page 3103
How to edit the one-time flat fee pricing rule type	Editing a One-Time Flat Fee Pricing Rule Type on page 3130

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For more information on...	See...
How to edit the bill period based recurring flat fee pricing rule type	Editing a Bill Period Based Recurring Flat Fee Pricing Rule Type on page 3144
How to edit the frequency based recurring flat fee pricing rule type	Editing a Frequency Based Recurring Flat Fee Pricing Rule Type on page 3158
How to delete a pricing rule type	Deleting a Pricing Rule Type
How to edit a benefit pricing rule type	Editing a Benefit Pricing Rule Type on page 3444
How to delete a benefit pricing rule type	Deleting a Benefit Pricing Rule Type on page 3445

Claim Pricing

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

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

It is the claim pricing rule type which helps the system to determine:

- Business object using which the claim pricing rule should be created in the system.
- Whether it is the primary pricing rule type from where the related pricing rule types, such as specific stop-loss, aggregate stop-loss, and retention type claim based pricing rule types, will inherit the attributes.

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

- Pricing rule types which are related to claim pricing rule type.
- Transaction fields from where the data for claim, specific stop-loss, aggregate stop-loss, retention type claim based processing should be retrieved.
- Algorithm which should be triggered while validating a transaction.

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

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

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

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

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

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

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

- Price items for which you can define claim pricing rules using the claim pricing rule type.
- Rate options that you can use while defining the pricing for a price item.
- Different type of account to which the price item should be billed based on the specified priority.
- Price item parameters which you can use while accumulating specific stop-loss and aggregate stop-loss and while aggregating transactions.
- Claim templates which can be used while defining claim pricing rules using the claim pricing rule type.
- Additional information, such as:
    - Whether the price items included in the claim pricing rule type are eligible for specific stop-loss and aggregate stop-loss.
    - Identifiers which help to determine whether the claim transaction is received during the run-in period of the policy.
    - Billable charge line type using which you want to create markup or markdown calculation lines.
    - Transaction field which you want to use in the rules as the output parameter to determine whether the line item is eligible for billing.
    - Transaction field which you want to use in the rules as the output parameter to determine whether the markup or markdown calculation line is eligible for billing.

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

- Price item for which you want to define the pricing.
- Pricing date range during which the pricing is effective.
- Rate option and claim template which you want to use while defining the claim pricing.
- Whether you want to markup or markdown the various charges.
- Whether you want to use a flat amount for markup or markdown on overall charges.
- Whether you want to calculate markup or markdown amount based on percentage for each eligible charge.
- Whether a line item is eligible for billing when the billing eligibility for the line item in the claim template is set to **User Defined**.

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

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

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

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

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Defining a Claim Pricing Rule Type

Prerequisites

To define a claim pricing rule type, you should have:

- Business Object **C1-PricingRuleTypeClaim** defined for pricing rule type.
- Business Object **C1-PricingRuleClaim** defined for pricing rule.
- Pricing rule type category for claim defined in the application

Procedure

To define a claim pricing rule type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **P** and then click **Pricing Rule Type**.
   A sub-menu appears.
3. Click the **Add** option from the **Pricing Rule Type** sub-menu.

   The **Select Business Object** screen appears. It contains the following field:

Field Name	Field Description	Mandatory (Yes or No)
Pricing Rule Type Business Object	Used to indicate the business object using which you want to create the pricing rule type. **Note:** You can create a claim pricing rule type using the **Claim Pricing Rule Type** business object.	Yes

Tip: Alternatively, you can access this screen by clicking the **Add** button in the **Page Title** area of the **Pricing Rule Type** screen.

4. Select the **Claim Pricing Rule Type** business object.
5. Click **OK**.

   The **Claim Pricing Rule Type** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details about the claim pricing rule type.
   - **Related Pricing Rule Types** - Used to define the pricing rule types which are related to the parent pricing rule type.
   - **Transaction Field Mapping** - Used to specify the transaction related data mapped to the pricing rule type
   - **Algorithms** - Used to define the algorithms used for the pricing rule type.
   - **Additional Data** - Used to specify the additional information about the pricing rule type.
   - **Price Items** - Used to define the price items assigned to the pricing rule type.
   - **Price Item Parameters** - Used to define the price item parameters in the pricing rule type.
   - **Characteristics** - Used to define the characteristics for the pricing rule type.
   - **Claim Templates** - Used to define the pricing rule type for claim template.
   - **Claim-Specific Additional Data** - Used to specify the claim specific additional data.

   The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Pricing Rule Type	Used to specify the pricing rule type.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
Description	Used to specify the description for the pricing rule type.	Yes
Detailed Description	Used to specify additional information about the pricing rule type.	No
Related Transaction Business Object	Used to indicate the pricing rule business object. The valid values are: • Claim Pricing Rule • Aggregate Stop-Loss (ASL) Pricing Rule • Specific Stop-Loss (SSL) Pricing Rule • Retention Type Claim Based Pricing Rule • Retention Type Enrollment Based Pricing Rule	Yes
Business Object	Indicate the pricing rule type business object for claim.	Not applicable
Status	Used to indicate the status of the pricing rule type. The valid values are: • Active • Inactive	Yes
Primary	Used to select the checkbox if the pricing rule type is primary.	No
Pricing Rule Type Category	Used to indicate the pricing rule type category for the pricing rule type. The valid values are: • Claim • Aggregate Stop-Loss • Specific Stop-Loss • Retention Type Claim Based • Retention Type Enrollment Based	Yes

6. Enter the required details in the **Main** section.
7. Add the related pricing rule types in the primary pricing rule type, if required.

Note: Related Pricing Rule Types section appears when the pricing rule type is primary.

8. Define the transaction field mapping in the primary pricing rule type, if required.

Note: Transaction Field Mapping section appears when the pricing rule type is primary.

9. Associate algorithms with the pricing rule type, if required.
10. Define additional data for the pricing rule type, if required.
11. Add pricing items in the pricing rule type, if required.
12. Add price item parameters in the pricing rule type, if required.
13. Define characteristics for the pricing rule type, if required.
14. Add claim templates in the claim pricing rule type, if required.
15. Add the claim-specific data in the pricing rule type, if required.
16. Define claim handling fees indicator in the claim pricing rule type, if required.
17. Click **Save**.
    The claim pricing rule type is defined.

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Related Topics

For more information on...	See...
Pricing Rule Type screen	Pricing Rule Type on page 2942
How to add the related pricing rule types in the primary pricing rule type	Adding Related Pricing Rule Types in a Primary Pricing Rule Type on page 2959
How to define the transaction field mapping in the primary pricing rule type	Defining Transaction Field Mapping in a Primary Pricing Rule Type on page 2961
How to associate algorithms with the pricing rule type	Associating Algorithms with a Pricing Rule Type on page 2967
How to define additional data for the pricing rule type	Defining Additional Data for a Pricing Rule Type on page 2969
How to add pricing items in the pricing rule type	Adding Price Items in a Pricing Rule Type on page 2971
How to add price item parameters in the pricing rule type	Adding a Price Item Parameter in a Pricing Rule Type on page 2973
How to define a characteristic for the pricing rule type	Defining a Characteristic for a Pricing Rule Type on page 2975
How to add claim templates in the claim pricing rule type	Adding Claim Templates in a Claim Pricing Rule Type on page 2977
How to add the claim-specific data in the pricing rule type	Adding the Claim-Specific Data in a Pricing Rule Type on page 2978
How to define the claim handling fees indicators in the claim pricing rule type	Adding Claim Handling Fees Indicator in a Claim Pricing Rule Type on page 2979

Adding Related Pricing Rule Types in a Primary Pricing Rule Type

Prerequisites

To add related pricing rule types in a primary pricing rule type, you should have:

- Aggregate Stop Loss pricing rule type defined in the application.
- Specific Stop Loss pricing rule type defined in the application.
- Level Funding pricing rule type defined in the application.

Procedure

To add related pricing rule types in a primary pricing rule type:

1. Ensure that the **Related Pricing Rule Types** section is expanded when you are defining or editing a primary pricing rule type.

   Note:

   This section appears when you have chosen the **Primary** from the **Main** section.

   The **Related Pricing Rule Types** section contains the following columns in a grid:

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Column Name	Column Description	Mandatory (Yes or No)
Sequence	Used to specify the order in which the related pricing rule type should be invoked.	Yes (Conditional) **Note:** This field is required when you are defining a pricing rule type for the related pricing rule type.
Pricing Rule Type	Used to specify the pricing rule type which should be executed to determine whether the related pricing rule type is eligible for deriving the transaction legs. **Note:** On clicking the **Search** (🔍) icon that appears corresponding to the **Pricing Rule Type** field, the **Pricing Rule Type Search** window appears. On specifying the related pricing rule type, the description of the pricing rule type appears corresponding to the **Pricing Rule Type** field.	Yes (Conditional) **Note:** This field is required when the corresponding **Sequence** and **Eligibility Rule Type** field is specified for the related pricing rule type.
Eligibility Rule Type	Used to indicate the rule type eligibility for the related pricing rule type. **Note:** The **Eligibility Rule Type** list includes only those rule-types where the rule type eligibility is **Related Pricing Rule Type Eligibility**.	No

2. Enter the required details in the **Related Pricing Rule Types** section.
3. If you want to define more than one related pricing rule type for the primary pricing rule type, click the **Add** (+) icon and then repeat step 2.

Note: However, if you want to remove a related pricing rule type from the primary pricing rule type, click the **Delete** (🗑) icon corresponding to the related pricing rule type.

4. Click **Save**.
   The related pricing rule types are added for the primary pricing rule type.

Related Topics

For more information on...	See...
How to define a claim pricing rule type	Defining a Claim Pricing Rule Type on page 2957
How to define a specific stop-loss (SSL) pricing rule type	Defining a Specific Stop-Loss (SSL) Pricing Rule Type on page 3008
How to define an aggregate stop-loss (ASL) pricing rule type	Defining a Aggregate Stop-Loss (ASL) Pricing Rule Type on page 3041
How to define a retention type claim based pricing rule type	Defining a Retention Type Claim Based Pricing Rule Type on page 3074
How to define a retention type enrollment based pricing rule type	Defining a Retention Type Enrollment Based Pricing Rule Type on page 3100
How to define a one-time flat fee pricing rule type	Defining a One-Time Flat Fee Pricing Rule Type on page 3126

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For more information on...	See...
How to define a bill period based recurring flat fee pricing rule type	Defining a Bill Period Based Recurring Flat Fee Pricing Rule Type on page 3140
How to define a frequency based recurring flat fee pricing rule type	Defining a Frequency Based Recurring Flat Fee Pricing Rule Type on page 3154
How to edit a claim pricing rule type	Editing a Claim Pricing Rule Type on page 2980
How to edit a specific stop-loss (SSL) pricing rule type	Editing a Specific Stop-Loss (SSL) Pricing Rule Type on page 3012
How to edit an aggregate stop-loss (ASL) pricing rule type	Editing an Aggregate Stop-Loss (ASL) Pricing Rule Type on page 3046
How to edit a retention type claim based pricing rule type	Editing a Retention Type Claim Based Pricing Rule Type on page 3077
How to edit a retention type enrollment based pricing rule type	Editing a Retention Type Enrollment Based Pricing Rule Type on page 3103
How to edit a one-time flat fee pricing rule type	Editing a One-Time Flat Fee Pricing Rule Type on page 3130
How to edit a bill period based recurring flat fee pricing rule type	Editing a Bill Period Based Recurring Flat Fee Pricing Rule Type on page 3144
How to edit a frequency based recurring flat fee pricing rule type	Editing a Frequency Based Recurring Flat Fee Pricing Rule Type on page 3158

Defining Transaction Field Mapping in a Primary Pricing Rule Type

Prerequisites

To define the transaction field mapping for a primary pricing rule type, you should have:

- Transaction fields defined in the application

Procedure

To define the transaction field mapping for a primary pricing rule type:

1. Ensure that the **Transaction Field Mapping** section is expanded when you are defining a primary pricing rule type.

> **Note:**
> This section appears when you have chosen the **Primary** option from the **Main** section.

The **Transaction Field Mapping** section contains the following fields:

Field Name	Field Description
Source System	Used to specify the external system from where the transaction data is mapped. **Note:** On clicking the **Search** (🔍) icon that appears corresponding to the **Source System** field, the **Transaction Field Search** window appears. On specifying the source system, the description of the source system appears corresponding to the **Source System** field.

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Field Name	Field Description
Parameter 1.....Parameter 4	Used to specify the parameters mapped for the transaction.
	Note: On clicking the **Search** (🔍) icon that appears corresponding to the **Parameter 1**, **Parameter 2**, **Parameter 3**, **Parameter 4** field, the **Transaction Field Search** window appears. On specifying the parameter, the description of the parameter appears corresponding to the **Parameter 1**, **Parameter 2**, **Parameter 3**, **Parameter 4** field respectively.
Incurred Date	Used to specify the date incurred for transaction.
	Note: On clicking the **Search** (🔍) icon that appears corresponding to the **Incurred Date** field, the **Transaction Field Search** window appears. On specifying the incurred date, the description of the incurred date appears corresponding to the **Incurred Date** field.
Paid Date	Used to specify the transaction paid date.
	Note: On clicking the **Search** (🔍) icon that appears corresponding to the **Paid Date** field, the **Transaction Field Search** window appears. On specifying the paid date, the description of the paid date appears corresponding to the **Paid Date** field.
Source of Funds	Used to specify the source of funds used to make the payment.
	Note: On clicking the **Search** (🔍) icon that appears corresponding to the **Source of Funds** field, the **Transaction Field Search** window appears. On specifying the source of funds, the description of the source of funds appears corresponding to the **Source of Funds** field.
Composite	Used to specify the composite transaction data.
	Note: On clicking the **Search** (🔍) icon that appears corresponding to the **Composite** field, the **Transaction Field Search** window appears. On specifying the composite, the description of the composite appears corresponding to the **Composite** field.
Claim Disposition	Used to specify the disposition of the claims transaction.

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Field Name	Field Description
	Note: On clicking the **Search** (🔍) icon that appears corresponding to the **Claim Disposition** field, the **Transaction Field Search** window appears. On specifying the claim disposition, the description of the claim disposition appears corresponding to the **Claim Disposition** field.
Provider's Tax Identification Number	Used to specify the tax identification number of the provider.
	Note: On clicking the **Search** (🔍) icon that appears corresponding to the **Provider's Tax Identification Number** field, the **Transaction Field Search** window appears. On specifying the provider's tax identification number, the description of the provider's tax identification number appears corresponding to the **Provider's Tax Identification Number** field.
Member ID	Used to specify the member ID.
	Note: On clicking the **Search** (🔍) icon that appears corresponding to the **Member ID** field, the **Transaction Field Search** window appears. On specifying the member ID, the description of the member ID appears corresponding to the **Member ID** field.
Main Subscriber ID	Used to specify the customer ID.
	Note: On clicking the **Search** (🔍) icon that appears corresponding to the **Main Subscriber ID** field, the **Transaction Field Search** window appears. On specifying the main subscriber ID, the description of the main subscriber ID appears corresponding to the **Main Subscriber ID** field.
Run-in Identifier	Used to specify the run-in identifier.
	Note: On clicking the **Search** (🔍) icon that appears corresponding to the **Run-in Identifier** field, the **Transaction Field Search** window appears. On specifying the run-in identifier, the description of the run-in identifier appears corresponding to the **Run-in Identifier** field.
Runout Identifier	Used to specify the runout identifier.

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Field Name	Field Description
	Note: On clicking the **Search** (🔍) icon that appears corresponding to the **Runout Identifier** field, the **Transaction Field Search** window appears. On specifying the runout identifier, the description of the runout identifier appears corresponding to the **Runout Identifier** field.
Third Party Identifier	Used to specify the third party identifier to determine that the claim transaction is received from an external source system while defining a claim pricing rule type.
	Note: On clicking the **Search** (🔍) icon that appears corresponding to the **Third Party Identifier** field, the **Transaction Field Search** window appears. On specifying the third party identifier, the description of the third party identifier appears corresponding to the **Third Party Identifier** field.
Coverage Start Date	Used to specify the transaction coverage start date.
	Note: On clicking the **Search** (🔍) icon that appears corresponding to the **Coverage Start Date** field, the **Transaction Field Search** window appears. On specifying the coverage start date, the description of the coverage start date appears corresponding to the **Coverage Start Date** field.
Coverage End Date	Used to specify the transaction coverage end date.
	Note: On clicking the **Search** (🔍) icon that appears corresponding to the **Coverage End Date** field, the **Transaction Field Search** window appears. On specifying the coverage end date, the description of the coverage end date appears corresponding to the **Coverage End Date** field.
Retroactivity Indicator	Used to specify information of the retroactivity indicator.
	Note: On clicking the **Search** (🔍) icon that appears corresponding to the **Retroactivity Indicator** field, the **Transaction Field Search** window appears. On specifying the retroactivity indicator, the description of the retroactivity indicator appears corresponding to the **Retroactivity Indicator** field.
Network Indicator	Used to map to a transaction field which indicates whether the service provider is in network or out of network.

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Field Name	Field Description
	Note: On clicking the **Search** (🔍) icon that appears corresponding to the **Network Indicator** field, the **Transaction Field Search** window appears. On specifying the network indicator, the description of the network indicator appears corresponding to the **Network Indicator** field.
Covered Charged Amount	Used to map to a transaction field which indicates the amount which is covered for the employee in the policy.
	Note: On clicking the **Search** (🔍) icon that appears corresponding to the **Covered Charged Amount** field, the **Transaction Field Search** window appears. On specifying the covered charged amount, the description of the covered charged amount appears corresponding to the **Covered Charged Amount** field.
Discount Savings Amount	Used to map to a transaction field which indicates the amount which is offered as the discount to the service provider.
	Note: On clicking the **Search** (🔍) icon that appears corresponding to the **Discount Savings Amount** field, the **Transaction Field Search** window appears. On specifying the discount savings amount, the description of the discount savings amount appears corresponding to the **Discount Savings Amount** field.
Accumulation Only Identifier	Used to map to a transaction field which indicates that the claim transaction should only be used for calculating charges for the accumulated products, such as Specific Stop-Loss, Aggregate Stop-Loss, and so on. This means that the system should not derive the claim transaction leg. Instead, it should only derive the specific stop-loss or aggregate stop loss transaction legs for the claim transaction.
	Note: On clicking the **Search** (🔍) icon that appears corresponding to the **Accumulation Only Identifier** field, the **Transaction Field Search** window appears. On specifying the accumulation only identifier, the description of the accumulation only identifier appears corresponding to the **Accumulation Only Identifier** field.
Billing Eligibility Identifier	Used to specify whether the transaction is eligible for billing or not.
	Note: On clicking the **Search** (🔍) icon that appears corresponding to the **Billing Eligibility Identifier** field, the **Transaction Field Search** window appears. On specifying the billing eligibility identifier, the description of the billing eligibility identifier appears corresponding to the **Billing Eligibility Identifier** field.

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Field Name	Field Description
Transaction Upload Date	Used to map to a transaction field which indicates the date when the transaction was uploaded in the external system. The system does not derive the discount transaction leg when the transaction upload date is later than the settlement date.
	Note: On clicking the **Search** (🔍) icon that appears corresponding to the **Transaction Upload Date** field, the **Transaction Field Search** window appears. On specifying the transaction upload date, the description of the transaction upload date appears corresponding to the **Transaction Upload Date** field.
Claim Handling Fees Indicator	Used to specify the claim handling fees which are applicable to one or more line items in the claim pricing rule.
	Note: On clicking the **Search** (🔍) icon that appears corresponding to the **Claim Handling Fees Indicator** field, the **Transaction Field Search** window appears. On specifying the claim handling fees indicator, the description of the claim handling fees indicator appears corresponding to the **Claim Handling Fees Indicator** field.

2. Enter the required details in the **Transaction Field Mapping** section.
3. Click **Save**.
   The transaction field mapping is defined for the primary pricing rule type.

Related Topics

For more information on...	See...
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Associating Algorithms with a Pricing Rule Type

Prerequisites

To associate algorithms with a pricing rule type, you should have:

- Algorithm and Algorithm Type defined in the application.
- System event defined in the application.

Procedure

To associate algorithms with a pricing rule type:

1. Ensure that the **Algorithms** section is expanded when you are defining a pricing rule type.

   The **Algorithms** section contains the following columns in a grid:

Column Name	Column Description	Mandatory (Yes or No)
System Event	Used to indicate the system event on which the algorithm is executed. The valid values are: • Account and Price Item Derivation • Accumulation Billable Charge Post-Processing • Accumulation Billable Charge Pre-Processing • Accumulation Post-Processing • Accumulation Pre-Processing • Bill After Date Determination • Bill Group Derivation • Final Settlement Derivation • Billable Charge Creation Pre-Processing • Billable Charge Creation Post-Processing • Pricing Rule Post-Processing • Pricing Rule Pre-Processing • Premium Calculation • Transaction Validation	Yes **Note:** This field is required when you are defining an algorithm for the pricing rule type.
Sequence	Used to specify the order in which the algorithms for each system event must be executed.	Yes (Conditional)

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Column Name	Column Description	Mandatory (Yes or No)
		Note: This field is required when you are defining an algorithm for the pricing rule type.
Algorithm	Used to specify the algorithm.	Yes (Conditional)
	Note: If you select the system event option, the **Search** (🔍) icon appears corresponding to the **Algorithm** field. On clicking the **Search** (🔍) icon, the **Algorithm Search** window appears. On specifying the algorithm, the description of the algorithm appears corresponding to the **Algorithm** field.	**Note:** This field is required when you are defining an algorithm for the pricing rule type.

2. Enter the required details in the **Algorithms** section.
3. If you want to associate more than one algorithm for the pricing rule type, click the **Add** (+) icon and then repeat step 2.

> **Note:** However, if you want to disassociate an algorithm from the pricing rule type, click the **Delete** (🗑) icon corresponding to the algorithm.

4. Click **Save**.
   The algorithms are associated with the pricing rule type.

Related Topics

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Defining Additional Data for a Pricing Rule Type

Procedure

To define additional data for a pricing rule type:

1. Ensure that the **Additional Data** section is expanded when you are defining a pricing rule type.

   Note: This section does not appear when the **Pricing Rule Type Category** is **Flat Fees**.

   The **Additional Data** section contains the following fields:

Field Name	Field Description
Eligible for Level Funding	Used to indicate whether the pricing rule type is eligible for level funding or not. The valid values are: • Yes • No
Eligible for Specific Stop-Loss	Used to whether the pricing rule type is eligible for specific stop-loss or not. The valid values are: • Yes • No **Note:** This field appears when the option selected for the **Pricing Rule Type Category** is **Claim**, **Retention Type Claim Based**, or **Retention Type Enrollment Based**.
Run-in Identifier Value	Used to specify the identifier value to determine that the ancillary transaction is received during the run-in period of the policy.
Third Party Identifier Value	Used to specify the identifier value to determine that the ancillary transaction is received from an external source system.
Accumulation Only Identifier Value	Used to specify the identifier value to determine that the ancillary transaction contains the accumulated information of ASL, SSL, and Level Funding pricing types.
Eligible for Write-Off in Post Runout	Used to indicate whether the pricing rule is eligible for Write-Off in Post Runout or not. The valid values are: • Yes

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Field Name	Field Description
	• No
Post Runout Write-Off Adjustment Type	Used to specify the adjustment type using which the post runout write-off adjustments must be created.
Rule Based Price Item Eligibility Field	Used to specify the price item eligibility field that satisfies the pricing rule.
Rule Based Related Pricing Rule Type Eligibility Field	Used to specify the pricing rule type eligibility field that satisfies the pricing rule.
Rule Based Eligibility Value	Used to specify the eligibility value that satisfies the pricing rule.

2. Enter the required details in the **Additional Data** section.
3. Click **Save**.
   The additional data is defined for the ppricing rule type.

Related Topics

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Adding Price Items in a Pricing Rule Type

Prerequisites

To add price items in a pricing rule type, you should have:

- Price items defined in the application
- Rate Options defined in the application
- Invoice Type defined in the application

Procedure

To add price items in a pricing rule type:

1. Ensure that the **Price Items** section is expanded when you are defining or *e*diting a pricing rule type.

   The **Price Items** section contains the following columns in a grid:

<table>
<tr><th>Column Name</th><th>Column Description</th></tr>
<tr><td>Price Item</td><td>Used to specify the price item information.

Note:
On clicking the Search (🔍) icon that appears corresponding to the Price Item field, the Price Item Search window appears.
On specifying the price item, the description of the price item appears corresponding to the Price Items field.</td></tr>
<tr><td>Rate Option</td><td>On clicking the Add (➕) icon, the following column appears in a grid:
<table><tr><th>Column Name</th><th>Column Description</th><th>Mandatory (Yes or No)</th></tr><tr><td>Rate Option</td><td>Used to indicate the rate option for the price item. The valid values are:
• Aggregate Stop Loss
• Ancillary
• Claims
• Discount Share
• Enrollment Based Retention Per Member Per Month
• Enrollment Based Retention Per Subscriber Per Month
• Flat Dollar Per Claim - Aggregate Daily
• Percentage of Claim - Aggregate Daily
• Retention Claim Percentage Based Service Agreement
• Retention - Aggregate Monthly
• Specific Stop Loss</td><td>Yes (Conditional)
Note: This field is required when the Price Item field is present.</td></tr></table></td></tr>
</table>

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<table>
<tr><th>Column Name</th><th>Column Description</th></tr>
<tr><td></td><td>
<table>
<tr><th>Column Name</th><th>Column Description</th><th>Mandatory (Yes or No)</th></tr>
<tr><td></td><td>• TFM Claim Weekly</td><td></td></tr>
</table>
Note: The Rate Option column does not appear when the Pricing Rule Type Category is Flat Fees.
</td></tr>
<tr><td>Bill To Account</td><td>On clicking the Add (+) icon, the following columns appear in a grid:
<table>
<tr><th>Column Name</th><th>Column Description</th><th>Mandatory (Yes or No)</th></tr>
<tr><td>Priority</td><td>Used to specify the order in which the invoice type is considered for a price item.</td><td>Yes (Conditional)
Note: This field is required when you are defining the invoice type.</td></tr>
<tr><td>Invoice Type</td><td>Used to specify the invoice type for the price item.
Note: On clicking the Search (Q) icon that appears corresponding to the Invoice Type field, the Invoice Type Search window appears.</td><td>No</td></tr>
</table>
</td></tr>
</table>

2. Enter the required details in the **Price Items** section.
3. If you want to define more than one price item for the pricing rule type, click the **Add** (+) icon and then repeat step 2.

Note: However, if you want to remove a price item from the pricing rule type, click the **Delete** (🗑) icon corresponding to the price item.

4. If you want to define more than one rate option to the price item for the pricing rule type, click the **Add** (+) icon and then repeat step 2.

Note: However, if you want to remove a rate option from the price item for the pricing rule type, click the **Delete** (🗑) icon corresponding to the rate option.

5. If you want to define more than one invoice types to the price item for the pricing rule type, click the **Add** (+) icon and then repeat step 2.

Note: However, if you want to remove a invoice type from the price item for the pricing rule type, click the **Delete** (🗑) icon corresponding to the invoice type.

6. Click **Save**.
   The price items are added for the pricing rule type.

Related Topics

For more information on...	See...
How to define a claim pricing rule type	Defining a Claim Pricing Rule Type on page 2957

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Adding a Price Item Parameter in a Pricing Rule Type

Prerequisites

To add a price item parameter in a pricing rule type, you should have:

- Parameters defined in the application
- Transaction field defined in the application
- Price item parameter associated with the price item

Procedure

To add a price item parameter in a pricing rule type:

1. Ensure that the **Price Item Parameters** section is expanded when you are defining or *e*diting a pricing rule type.

   The **Price Item Parameters** section contains the following columns in a grid:

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Column Name	Column Description	Mandatory (Yes or No)
Price Item Parameter	Used to specify the parameter which you can use while defining the pricing for the price item. **Note:** On clicking the **Search** (🔍) icon corresponding to the **Price Item Parameter** field, the **Parameter Search** window appears. On specifying the parameter, the description of the price item parameter appears corresponding to the **Price Item Parameter** field.	Yes (Conditional) **Note:** This field is required when you are defining the pricing rule type.
Transaction Field	Used to specify the transaction field from where the data should be retrieved. **Note:** On clicking the **Search** (🔍) icon corresponding to the **Transaction Field** field, the **Transaction Field Search** window appears. On specifying the transaction field, the description of the transaction field appears corresponding to the **Transaction Field**.	Yes (Conditional) **Note:** This field is required once the price item parameter is specified.
Eligible for Specific Stop-Loss	Used to indicate whether the price item parameter can be used in the accumulation criteria.	No
Eligible for Level Funding	Used to specify whether the price item parameter can be used in level funding or not.	No

2. Enter the required details in the **Price Item Parameters** section.
3. If you want to add more than one price item parameter for the pricing rule type, click the **Add** (+) icon and then repeat step 2.

> **Note:** However, if you want to remove a price item parameter from the pricing rule type, click the **Delete** (🗑) icon corresponding to the price item parameter.

4. Click **Save**.
   A price item parameter is added for the pricing rule type.

Related Topics

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Defining a Characteristic for a Pricing Rule Type

Prerequisites

To define the characteristics for a pricing rule type, you should have:

- Characteristic types defined in the application (where the characteristic entity is set to **Pricing Rule Type**)

Procedure

To define a characteristic for a pricing rule type:

1. Ensure that the **Characteristics** section is expanded when you are defining a pricing rule type.

   The **Characteristics** section contains the following columns in a grid:

Column Name	Column Description	Mandatory (Yes or No)
Characteristic Type	Used to indicate the characteristic type.	Yes (Conditional)
	Note: The list includes only those characteristic types where the characteristic entity is set to **Pricing Rule Type**.	**Note:** This field is required when you are defining a characteristic for the pricing rule type.
Characteristic Value	Used to specify the value for the characteristic type.	Yes (Conditional)

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Column Name	Column Description	Mandatory (Yes or No)
	Note: If you select a predefined characteristic type, the **Search** (🔍) icon appears corresponding to the **Characteristic Value** field. On clicking the **Search** icon, the **Predefined Characteristic Search** window appears. On specifying the value for a predefined characteristic type, the description of the characteristic value appears corresponding to the **Characteristic Value** field.	**Note:** This field is required when you are defining a characteristic for the pricing rule type.

2. Enter the required details in the **Characteristics** section.
3. If you want to define more than one characteristic for the pricing rule type, click the **Add** (+) icon and then repeat step 2.

Note: However, if you want to remove a characteristic from the pricing rule type, click the **Delete** (🗑) icon corresponding to the characteristic.

4. Click **Save**.
   The characteristics are defined for the pricing rule type.

Related Topics

For more information on...	See...
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Adding Claim Templates in a Claim Pricing Rule Type

Prerequisites

To add claim templates in a claim pricing rule type, you should have:

- Claim templates defined in the application

Procedure

To add claim templates in a claim pricing rule type:

1. Ensure that the **Claim Templates** section is expanded when you are defining or editing a pricing rule type.

   The **Claim Templates** section contains the following columns in a grid:

Column Name	Column Description	Mandatory (Yes or No)
Claim Template	Used to indicate the claim template.	Yes (Conditional) **Note:** This field is required when you are defining a claim template for the pricing rule type.

2. Enter the required details in the **Claim Templates** section.
3. If you want to define more than one claim template for the pricing rule type, click the **Add** (+) icon and then repeat step 2.

   Note: However, if you want to remove a claim template from the pricing rule type, click the **Delete** (🗑) icon corresponding to the claim template.

4. Click **Save**.
   The claim templates are defined for the pricing rule type.

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Adding the Claim-Specific Data in a Pricing Rule Type

Procedure

To add the Claim-Specific additional data in a pricing rule type:

1. Ensure that the **Claim-Specific Additional Data** section is *e*xpanded when you are defining or editing a pricing rule type.

   The **Claim-Specific Additional Data** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Rule Based Billing Eligibility Field	Used to specify whether the rule based field is eligible for billing or not. **Note:** On clicking the **Search** (🔍) icon that appears corresponding to the **Rule Based Billing Eligibility Field** field, the **Field Search** window appears. On specifying the field, the description of the field appears corresponding to the **Rule Based Billing Eligibility Field** field.	No
Rule Based Markup or Markdown Eligibility Field	Used to specify whether the rule based markup or markdown field is eligible for billing or not.	No

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Field Name	Field Description	Mandatory (Yes or No)
	Note: On clicking the **Search** (🔍) icon that appears corresponding to the **Rule Based Markup or Markdown Eligibility Field** field, the **Field Search** window appears. On specifying the field, the description of the field appears corresponding to the **Rule Based Markup or Markdown Eligibility Field** field.	
Markup or Markdown Billable Charge Line Type	Used to specify the markup or markdown billable charge line type.	No
	Note: On clicking the **Search** (🔍) icon that appears corresponding to the **Markup or Markdown Billable Charge Line Type** field, the **Billable Charge Line Type Search** window appears. On specifying the billable charge line type, the description of the billable charge lien type appears corresponding to the **Markup or Markdown Billable Charge Line Type** field.	

2. Enter the required details in the **Claim-Specific Additional Data** section.
3. Click **Save**.
   The Claim-Specific Additional data is added in the pricing rule type.

Related Topics

For more information on...	See...
How to define a claim pricing rule type	Defining a Claim Pricing Rule Type on page 2957
How to edit the claim pricing rule type	Editing a Claim Pricing Rule Type on page 2980

Adding Claim Handling Fees Indicator in a Claim Pricing Rule Type

Procedure

To add claim handling fees indicator in a claim pricing rule type:

1. Ensure that the **Claim Handling Fees Indicator** section is expanded when you are defining or editing a claim pricing rule type.

   The **Claim Handling Fees Indicator** section contains the following fields in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Fee	Used to indicate the charge type category for the claim pricing rule type.	Yes (Conditional)

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Field Name	Field Description	Mandatory (Yes or No)
		Note: This field is required while adding claim handling fees indicator in a claim pricing rule.
Fee Indicator	Used to specify the charge type sub category for the claim pricing rule type.	No

2. Enter the required details in the **Claim Handling Fees Indicator** section.
3. If you want to define more than one claim handling fees indicator for the claim pricing rule type, click the **Add** (+) icon and then repeat step 2.

Note: However, if you want to remove a claim handling fees indicator from the claim pricing rule type, click the **Delete** (🗑) icon corresponding to the fee.

4. Click **Save**.
   The claim handling fees indicator is defined for the claim pricing rule type.

Related Topics

For more information on...	See...
How to define a claim pricing rule type	Defining a Claim Pricing Rule Type on page 2957
How to define a specific stop-loss (SSL) pricing rule type	Defining a Specific Stop-Loss (SSL) Pricing Rule Type on page 3008
How to define an aggregate stop-loss (ASL) pricing rule type	Defining a Aggregate Stop-Loss (ASL) Pricing Rule Type on page 3041
How to define a retention type claim based pricing rule type	Defining a Retention Type Claim Based Pricing Rule Type on page 3074
How to define a retention type enrollment based pricing rule type	Defining a Retention Type Enrollment Based Pricing Rule Type on page 3100
How to edit the claim pricing rule type	Editing a Claim Pricing Rule Type on page 2980
How to edit the specific stop-loss (SSL) pricing rule type	Editing a Specific Stop-Loss (SSL) Pricing Rule Type on page 3012
How to edit the aggregate stop-loss (ASL) pricing rule type	Editing an Aggregate Stop-Loss (ASL) Pricing Rule Type on page 3046
How to edit the retention type claim based pricing rule type	Editing a Retention Type Claim Based Pricing Rule Type on page 3077
How to edit the retention type enrollment based pricing rule type	Editing a Retention Type Enrollment Based Pricing Rule Type on page 3103

Editing a Claim Pricing Rule Type

Prerequisites

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To edit the claim pricing rule type, you should have:

- Business Object **C1-PricingRuleClaim** defined for pricing rule.
- Pricing rule type category for claim defined in the application

Procedure

To edit a claim pricing rule type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **P** and then click **Pricing Rule Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Pricing Rule Type** sub-menu.
   The **Pricing Rule Type** screen appears.
4. In the **Pricing Rule Type List** zone, click the **Edit** (✎) icon in the **Edit** column corresponding *t*o the pricing rule type for claim whose details you want to edit.

   The **Claim Pricing Rule Type** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details about the claim pricing rule type.
   - **Related Pricing Rule Types** - Used to define the pricing rule types which are related to the parent pricing rule type.
   - **Transaction Field Mapping** - Used to specify the transaction related data mapped to the pricing rule type
   - **Algorithms** - Used to define the algorithms used for the pricing rule type.
   - **Additional Data** - Used to specify the additional information about the pricing rule type.
   - **Price Items** - Used to define the price items assigned to the pricing rule type.
   - **Price Item Parameters** - Used to define the price item parameters in the pricing rule type.
   - **Characteristics** - Used to define the characteristics for the pricing rule type.
   - **Claim Templates** - Used to define the pricing rule type for claim template.
   - **Claim-Specific Additional Data** - Used to specify the claim specific additional data.

   The **Main** section contains the following fields:

Field Name	**Field Description**	**Mandatory (Yes or No)**
Pricing Rule Type	Displays the pricing rule type.	Not applicable
Description	Used to specify the description for the pricing rule type.	Yes
Detailed Description	Used to specify additional information about the pricing rule type.	No
Related Transaction Business Object	Used to indicate the pricing rule business object. The valid values are: • Claim Pricing Rule • Aggregate Stop-Loss (ASL) Pricing Rule • Specific Stop-Loss (SSL) Pricing Rule • Retention Type Claim Based Pricing Rule • Retention Type Enrollment Based Pricing Rule	Yes
Business Object	Displays the pricing rule type business object for claim.	Not applicable
Status	Used to indicate the status of the pricing rule type. The valid values are: • Active • Inactive	Yes

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Field Name	Field Description	Mandatory (Yes or No)
Primary	Used to select the checkbox if the pricing rule type is primary.	No
Pricing Rule Type Category	Used to indicate the pricing rule type category for the pricing rule type. The valid values are: • Claim • Aggregate Stop-Loss • Specific Stop-Loss • Retention Type Claim Based • Retention Type Enrollment Based	Yes

Tip: Alternatively, you can click the **Edit** button in the **Pricing Rule Type** zone to edit the pricing rule type for claim.

5. Modify the details in the **Main** section, if required.
6. Add, edit, or remove the related pricing rule types in the primary pricing rule type, if required.
7. Modify the transaction field mapping in the primary pricing rule type, if required.
8. Add, edit, or remove algorithms with the pricing rule type, if required.
9. Modify the additional data for the pricing rule type, if required.
10. Add, edit, or remove pricing items in the pricing rule type, if required.
11. Add, edit, or remove price item parameters in the pricing rule type, if required.
12. Add, edit, or remove characteristics for the pricing rule type, if required.
13. Add, edit, or remove claim templates in the claim pricing rule type, if required.
14. Modify the claim-specific data in the pricing rule type, if required.
15. Click **Save**.
    The changes made to the claim pricing rule type are saved.

Related Topics

For more information on...	See...
Pricing Rule Type screen	Pricing Rule Type on page 2942
Pricing Rule Type List zone	Pricing Rule Type List on page 2943
Pricing Rule Type zone	Pricing Rule Type on page 2946
How to add the related pricing rule types in the primary pricing rule type	Adding Related Pricing Rule Types in a Primary Pricing Rule Type on page 2959
How to define the transaction field mapping in the primary pricing rule type	Defining Transaction Field Mapping in a Primary Pricing Rule Type on page 2961
How to associate algorithms with the pricing rule type	Associating Algorithms with a Pricing Rule Type on page 2967
How to define additional data for the pricing rule type	Defining Additional Data for a Pricing Rule Type on page 2969
How to add pricing items in the pricing rule type	Adding Price Items in a Pricing Rule Type on page 2971

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For more information on...	See...
How to add price item parameters in the pricing rule type	Adding a Price Item Parameter in a Pricing Rule Type on page 2973
How to define a characteristic for the pricing rule type	Defining a Characteristic for a Pricing Rule Type on page 2975
How to add claim templates in the claim pricing rule type	Adding Claim Templates in a Claim Pricing Rule Type on page 2977
How to add the claim-specific data in the pricing rule type	Adding the Claim-Specific Data in a Pricing Rule Type on page 2978

Deleting a Claim Pricing Rule Type

Procedure

To delete a claim pricing rule type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **P** and then click **Pricing Rule Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Pricing Rule Type** sub-menu.
   The **Pricing Rule Type** screen appears.
4. In the **Pricing Rule Type List** zone, click the **Delete** (🗑) icon in the **Delete** column corresponding to the claim pricing rule type that you want to delete.
   A message appears confirming whether you want to delete the claim pricing rule type.

   Note: You can delete a claim pricing rule type when it is not yet used in the system.

   Tip: Alternatively, you can delete a claim pricing rule type by clicking the **Delete** button in the **Pricing Rule Type** zone.
5. Click **OK**.
   The claim pricing rule type is deleted.

Related Topics

For more information on...	See...
Pricing Rule Type screen	Pricing Rule Type on page 2942
Pricing Rule Type List zone	Pricing Rule Type List on page 2943
Pricing Rule Type zone	Pricing Rule Type on page 2946

Viewing the Claim Pricing Rule Type Details

Procedure

To view the details of a claim pricing rule type:

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1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **P** and then click **Pricing Rule Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Pricing Rule Type** sub-menu.
   The **Pricing Rule Type** screen appears.
4. In the **Pricing Rule Type List** zone, click the **Broadcast** (📡) icon corresponding to the claim pricing rule type whose details you want to view.
   The **Pricing Rule Type** zone appears.
5. View the details of the claim pricing rule type in the **Pricing Rule Type** zone.

Related Topics

For more information on...	See...
Pricing Rule Type screen	Pricing Rule Type on page 2942
Pricing Rule Type List zone	Pricing Rule Type List on page 2943
Pricing Rule Type zone	Pricing Rule Type on page 2946

Defining a Claim Pricing Rule for a Parent Customer

Prerequisites

To define a claim pricing rule for a parent customer, you should have:

- Business Object **C1-PricingRule** defined for pricing rule.
- Business Object **C1-PricingRuleClaim** defined for claim pricing rule.
- Pricing rule type defined in the application.
- Price item defined in the application.
- Rate options defined in the Rate Option (**C1-ExtLookRateType**) extendable lookup.
- Claim template defined in the Claim Template (**C1-ExtLookClaimTemplate**) extendable lookup.
- Line items defined in the Line Item (**C1-ExtLookPricingRuleLineItem**) extendable lookup.

Procedure

To define a claim pricing rule for a parent customer:

1. Search for the account, person, or policy whose pricing details you want to view in the **Customer 360° View** screen.
2. In the **Search Results** section, click the **View** (🔗) icon corresponding to the account, person, or policy whose pricing details you want to view.
   The **Account**, **Person**, *or* **Policy** tab in the **Customer 360° Information** screen appears.
3. Click the **Pricing** tab and then click the **Add** link in the upper right corner of the **Parent Customer Pricing Rules** zone.

   The **Pricing Rule** screen appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Person Name	Displays the person name.	Not applicable
Person Type	Displays the person type.	Not applicable
Pricing Rule Type	Used to indicate the pricing rule type to create the pricing rule.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	Note: You can create a claim pricing rule using the **Pricing Rule Type** for claim.	

4. Click **OK**.

The **Claim Pricing Rule** screen appears. It contains the following sections:

- **Customer Information** - Displays the customer information.
- **Main** - Used to specify basic details about the claim pricing rule.
- **Claim Handling Fees** - Used to define the claim handling fees for the line items in the claim pricing rule.
- **Markup or Markdown Values** - Used to define the markup or markdown values for the line items in the claim pricing rule.
- **Line Items** - Used to associate line items eligible for billing in the claim pricing rule.
- **Characteristics** - Used to define the characteristics for the claim pricing rule.

The **Customer Information** section contains the following fields:

Field Name	Field Description
Parent Customer Information	Displays the parent customer information.
Pricing Rule Type	Indicates the pricing rule type.
Status	Indicates the status of the parent customer for the claim pricing rule. The valid values are: • Active • Inactive • Pending

The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Price Item	Used to indicate the price item.	Yes
Pricing Start Date	Used to specify the pricing rule start date. **Note:** This field is enabled when an option from **Price Item** field is selected. By default it displays the **Policy Start Date**.	Yes
Pricing End Date	Used to specify the pricing rule end date. **Note:** This field is enabled when an option from **Price Item** field is selected. By default it displays the **Policy End Date**.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
Rate Option	Used to indicate the rate option to define the claim pricing rule for the price item.	Yes
Claim Template	Used to indicate the claim template to define the claim pricing rule for a parent customer. **Note:** This field is enabled for selection when an option from **Price Item** field is selected.	Yes

5. Enter the required details in the **Main** section.
6. Define the claim handling fees for the line items in a claim pricing rule, if required.

   Note: The **Claim Handling Fees** section appears when an option from **Claim Template** field is selected.
7. Define the markup or markdown values for the line items in a claim pricing rule, if required.

   Note: The **Markup or Markdown Values** section appears when an option from **Claim Template** field is selected.
8. Define line items in a claim pricing rule, if required.

   Note: The **Line Items** section appears when an option from **Claim Template** field is selected.
9. Define characteristics for a claim pricing rule, if required.
10. Click **Save**.
    The claim pricing rule for a parent customer is defined.

Related Topics

For more information on...	See...
Customer 360° Information - Pricing tab	Customer 360° Information - Pricing Information on page 641
Parent Customer Pricing Rules zone	Parent Customer Pricing Rules on page 643
How to define claim handling fees on line items in a claim pricing rule	Defining the Claim Handling Fees For Line Items in a Claim Pricing Rule on page 2986
How to define markup or markdown values on line items in a claim pricing rule	Defining the Markup or Markdown Values For Line Items in a Claim Pricing Rule on page 2987
How to define line items in a claim pricing rule	Defining the Line Items in a Claim Pricing Rule on page 2990
How to define a characteristic for a claim pricing rule	Defining a Characteristic for a Claim Pricing Rule on page 2992

Defining the Claim Handling Fees For Line Items in a Claim Pricing Rule

Procedure

To define claim handling fees for the line items in a claim pricing rule:

1. Ensure that the **Claim Handling Fees** section is expanded when you have selected an option from the **Claim Template** field of **Main** section while defining a claim pricing rule.

   The **Claim Handling Fees** section contains the following fields:

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<table>
<tr><th>Field Name</th><th>Field Description</th><th>Mandatory (Yes or No)</th></tr>
<tr><td>Fee Type</td><td>Indicates the charge type defined on the line items.</td><td>Not applicable</td></tr>
<tr><td>Fee</td><td>Indicates the type of rate defined on the line items.</td><td>Not applicable</td></tr>
<tr><td>Fee Significance</td><td>Indicates the purpose of the imposing the fees on the line items.</td><td>Not applicable</td></tr>
<tr><td>Fee Applicability</td><td>Displays one or more applicable claim line item on which additional fees are imposed.<table><tr><th>Field Name</th><th>Field Description</th></tr><tr><td>Line Item</td><td>Indicates the line item that you want to use while defining additional fees for the claim pricing rule.</td></tr></table></td><td>Not applicable</td></tr>
<tr><td>Rating Information</td><td>Displays the rating information that you want to use while defining the rate for the line items.<table><tr><th>Field Name</th><th>Field Description</th></tr><tr><td>Rate Type</td><td>Indicates the rate type that you want to use while defining the rate for the line items.</td></tr><tr><td>Rate</td><td>Used to specify the rate that you want to use while defining the rate for the line items.

Note: This field is editable when the Editable checkbox is selected in the Rate column of the Claim Handling Fees section while defining or editing the C1-ExtLookClaimTemplate extendable lookup.</td></tr></table></td><td>No</td></tr>
</table>

2. Enter the required details in the **Claim Handling Fees** section.
3. Click **Save**.
   The claim handling fees for the line items are defined in a claim pricing rule.

Related Topics

For more information on...	See...
How to define a claim pricing rule for a parent customer	Defining a Claim Pricing Rule for a Parent Customer on page 2984
How to edit the claim pricing rule for a parent customer	Editing a Claim Pricing Rule of a Parent Customer on page 2993

Defining the Markup or Markdown Values For Line Items in a Claim Pricing Rule

Procedure

To define the markup or markdown values for the line items in a claim pricing rule:

1. Ensure that the **Markup or Markdown Values** section is expanded when you have selected an option from the **Claim Template** field of **Main** section while defining a claim pricing rule.

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The **Markup or Markdown Values** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Pricing Strategy	Used to indicate the pricing strategy. The valid values are: • Markdown • Markup • None **Note:** This field is disabled when the **Post Run Out Claims** option is selected from the **Claim Template** field of the **Main** section.	No
Markup or Markdown Type	Used to indicate the markup or markdown value type for claim pricing rule. The valid values are: • Flat Amount • Percentage **Note:** This field is disabled when the **Post Run Out Claims** option is selected from the **Claim Template** field of **Main** section.	No
Markup or Markdown Amount	Used to specify the markup or markdown amount. **Note:** This field is disabled when you select, • the **Post Run Out Claims** option from the **Claim Template** field of the **Main** section. • or the **Percentage** option from the **Markup or Markdown Type** field.	Yes (Conditional) **Note:** This field is required when you select **Flat Amount** option from the **Markup or Markdown Type** field.
Rate Type	Indicates the minimum and maximum markup or markdown defined using the rate type.	Not applicable
Rate Value	Used to specify the value for minimum and maximum markup or markdown using the rate type. **Note:** This field is editable only when the **Editable** checkbox is selected in the **Rate** column of the **Additional Fees** section while defining or editing the **C1-ExtLookClaimTemplate** extendable lookup.	Yes (Conditional) **Note:** This field is required when you select **Percentage** option from the **Markup or Markdown Type** field.

2. Enter the required details in the **Markup or Markdown Values** section.
3. Click **Save**.
   The markup or markdown values for the line items are defined for the claim pricing rule.

Related Topics

For more information on...	See...
How to define a claim pricing rule for a parent customer	Defining a Claim Pricing Rule for a Parent Customer on page 2984
How to edit the claim pricing rule for a parent customer	Editing a Claim Pricing Rule of a Parent Customer on page 2993

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Defining the Markup or Markdown Values for Line Items for Each Rule in a Claim Pricing Rule

Procedure

To define the markup or markdown values for line items for each rule in a claim pricing rule:

1. Ensure that sections for each rule are expanded when you have selected an option from the **Claim Template** field of **Main** section while defining a claim pricing rule.
2. Expand the **Markup or Markdown Values** and **Line Items** sections relevant to each rule.

   The **Markup or Markdown Values** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Pricing Strategy	Used to indicate the pricing strategy. The valid values are: • Markdown • Markup • None	No
Markup or Markdown Type	Used to indicate the markup or markdown value type for claim pricing rule. The valid values are: • Flat Amount • Percentage	No
Markup or Markdown Amount	Used to specify the markup or markdown amount.	Yes (Conditional)
	Note: This field is disabled when you select the **Flat Amount** option from the **Markup or Markdown Type** field.	**Note:** This field is required when you selecting **Percentage** option from the **Markup or Markdown Type** field.

   The **Line Items** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Sequence	Displays the sequence number for the line items.	Not applicable
Line Item	Displays the billing line items.	Not applicable
Billing Eligibility	Displays whether the line item is user defined, eligible or not eligible for billing. The valid values are: • Eligible • Not Eligible • User Defined (Default Yes) • User Defined (Default No)	Not applicable
User Defined Billing Option	Used to specify whether the billing option is user defined, eligible or not eligible.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The checkbox for this field is by default checked and disabled for values **Eligible**, **Rule Based**, or **Not Eligible** in the **Billing Eligibility** field. The checkbox for this field is enabled for values **User Defined (Default Yes)** or **User Defined (Default No)** in the **Billing Eligibility**.	
Markup or Markdown Percentage Eligibility	Displays whether the line item is eligible or not eligible for markup or markdown percentage. The valid values are: • Eligible • Not Eligible	Not applicable
Markup or Markdown Percentage	Used to specify the percentage for markup or markdown value. **Note:** This field is enabled when the **Markup or Markdown Percentage Eligibility** is **Eligible** and when the **Markup or Markdown Type** is **Percentage**.	Yes

3. Enter the required details in the **Markup or Markdown Values** section.
4. Enter the required details in the **Line Items** section.
5. Click **Save**.
   The markup or markdown values for line items for each rule are defined in the claim pricing rule.

Related Topics

For more information on...	See...
How to define a claim pricing rule for a bill group using a pricing group	Defining a Claim Pricing Rule for a Bill Group Using a Pricing Group on page 2999
How to edit the claim pricing rule of a bill group	Editing a Claim Pricing Rule of a Bill Group on page 3002

Defining the Line Items in a Claim Pricing Rule

Procedure

To define the line items in a claim pricing rule:

1. Ensure that the **Line Items** section is expanded when you are defining or editing a claim template.

   The **Line Items** section contains the following fields in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Sequence	Displays the sequence number for the line items.	Not applicable
Line Item	Displays the billing line items.	Not applicable
Billing Eligibility	Displays whether the line item is user defined, eligible or not eligible for billing. The valid values are:	Not applicable

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<table>
<tr><th>Field Name</th><th>Field Description</th><th>Mandatory (Yes or No)</th></tr>
<tr><td></td><td>• Eligible
• Not Eligible
• Rule Based
• User Defined (Default No)
• User Defined (Default Yes)</td><td></td></tr>
<tr><td>User Defined Billing Option</td><td>Used to specify whether the billing option is user defined, eligible or not eligible for billing.

Note:
This option appears selected and disabled when the Billing Eligibility column displays either Eligible, Rule Based, or Not Eligible.
This option appears selected and enabled when the Billing Eligibility column displays User Defined (Default Yes).
This option appears unchecked and enabled when the Billing Eligibility column displays User Defined (Default No).</td><td>Yes (Conditional)

Note: This field is required when the Billing Eligibility column displays User Defined (Default No).</td></tr>
<tr><td>Markup or Markdown Percentage Eligibility</td><td>Indicates whether the line item is eligible or not eligible for markup or markdown percentage. The valid values are:
• Eligible
• Not Eligible</td><td>Not applicable</td></tr>
<tr><td>Markup or Markdown Percentage</td><td>Used to specify the percentage for markup or markdown value.

Note: This field is enabled when the Markup or Markdown Percentage Eligibility is Eligible and when the Markup or Markdown Type is Percentage.</td><td>Yes (Conditional)

Note: This field is required when Markup or Markdown Percentage Eligibility is Eligible and when the Markup or Markdown Type is Percentage</td></tr>
<tr><td>Rating Information</td><td>Displays the rate type and rate value that you want to use while defining the rate for the line items.

<table>
<tr><th>Field Name</th><th>Field Description</th><th>Mandatory (Yes or No)</th></tr>
<tr><td>Rate Type</td><td>Indicates the rate type that you want to use while defining the rate for the line items.</td><td>Not applicable</td></tr>
<tr><td>Rate</td><td>Used to specify the rate value that you want to use while defining the rate for the line items.</td><td>Yes</td></tr>
</table>
</td><td>Yes</td></tr>
</table>

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Field Name	Field Description			Mandatory (Yes or No)
	Field Name	**Field Description**	**Mandatory (Yes or No)**	
		Note: This field is editable when the **Editable** checkbox is selected in the **Rating Information** column of the **Claim Handling Fees** section while defining or editing the **C1-ExtLookClaimTemplate** extendable lookup.		

2. Enter the required details in the **Line Items** section.
3. If you want to define more than one line item for the claim pricing rule, click the **Add** (+) icon and then repeat step 2.

Note: However, if you want to remove a line item from the claim pricing rule, click the **Delete** (🗑) icon corresponding to the line item.

4. Click **Save**.
   The line items are defined for the claim pricing rule.

Related Topics

For more information on...	See...
How to define a claim pricing rule for a parent customer	Defining a Claim Pricing Rule for a Parent Customer on page 2984
How to edit the claim pricing rule for a parent customer	Editing a Claim Pricing Rule of a Parent Customer on page 2993

Defining a Characteristic for a Claim Pricing Rule

Prerequisites

To define a characteristic for a claim pricing rule, you should have:

- Characteristic types defined in the application (where the characteristic entity is set to **Pricing Rule**)

Procedure

To define a characteristic for a claim pricing rule:

1. Ensure that the **Characteristics** section is expanded when you are defining or editing a pricing rule.

   The **Characteristics** section contains the following fields in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Effective Date	Used to specify the date from when the characteristic is effective for the claim pricing rule.	Yes (Conditional) **Note:** This field is required when you are defining a characteristic for the claim pricing rule.

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Field Name	Field Description	Mandatory (Yes or No)
Characteristic Type	Used to indicate the characteristic type.	Yes (Conditional)
	Note: The list includes only those characteristic types where the characteristic entity is set to **Pricing Rule**.	**Note:** This field is required when you are defining a characteristic for the claim pricing rule.
Characteristic Value	Used to specify the value for the characteristic type.	Yes (Conditional)
	Note: If you select a predefined characteristic type, the **Search** (🔍) icon appears corresponding to the **Characteristic Value** field. On clicking the **Search** icon, the **Predefined Characteristic Search** window appears. On specifying the value for a predefined characteristic type, the description of the characteristic value appears corresponding to the **Characteristic Value** field.	**Note:** This field is required when you are defining a characteristic for the claim pricing rule.

2. Enter the required details in the **Characteristics** section.
3. If you want to define more than one characteristic for the claim pricing rule, click the **Add** (+) icon and then repeat step 2.

> **Note:** However, if you want to remove a characteristic from the claim pricing rule, click the **Delete** (🗑) icon corresponding to the characteristic.

4. Click **Save**.
   The characteristics are defined for the claim pricing rule.

Related Topics

For more information on...	See...
How to define a claim pricing rule for a parent customer	Defining a Claim Pricing Rule for a Parent Customer on page 2984
How to edit the claim pricing rule for a parent customer	Editing a Claim Pricing Rule of a Parent Customer on page 2993

Editing a Claim Pricing Rule of a Parent Customer

Prerequisites

To edit a claim pricing rule of a parent customer, you should have:

- Business Object **C1-PricingRuleClaim** defined for claim pricing rule.
- Rate options defined in the Rate Option (**C1-ExtLookRateType**) extendable lookup.
- Claim template defined in the Claim Template (**C1-ExtLookClaimTemplate**) extendable lookup.
- Line items defined in the Line Item (**C1-ExtLookPricingRuleLineItem**) extendable lookup.

Procedure

To edit a claim pricing rule of a parent customer:

1. Search for the account, person, or policy whose pricing details you want to view in the **Customer 360° View** screen.

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2. In the **Search Results** section, click the **View** (🔗) icon corresponding to the account, person, *or* policy whose pricing details you want to view.
   The **Account**, **Person**, or **Policy** tab in the **Customer 360° Information** screen appears.
3. Click the **Pricing Information** tab.
   The **Pricing Information** tab appears.
4. In the **Parent Customer Pricing Rules** zone, click the **Edit** (✎) icon in the **Edit** column corresponding to the pricing rule type for claim whose claim pricing rule details you want to edit.

   The **Claim Pricing Rule** screen appears. It contains the following sections:

   - **Customer Information** - Displays the customer information.
   - **Main** - Used to specify basic details about the claim pricing rule.
   - **Claim Handling Fees** - Used to define the claim handling fees for the lines items in the claim pricing rule.
   - **Markup or Markdown Values** - Used to define the markup or markdown values for the lines items in the claim pricing rule.
   - **Line Items** - Used to associate line items eligible for billing in the claim pricing rule.
   - **Characteristics** - Used to define the characteristics for the claim pricing rule.

   The **Customer Information** section contains the following fields:

Column Name	Column Description
Parent Customer Information	Displays the parent customer information
Pricing Rule Type	Indicates the pricing rule type.
Status	Indicates the status of the parent customer for the claim pricing rule. The valid values are: • Active • Inactive • Pending

   The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Price Item	Used to indicate the price item for which you want to edit the pricing.	Yes
Pricing Start Date	Used to specify the start date from when the pricing will be effective for the price item. **Note:** The pricing start date cannot be later than the pricing end date.	Yes (Conditional) **Note:** Pricing Start Date should be entered if Pricing End Date has been mentioned.
Pricing End Date	Used to specify the end date till when the pricing will be effective for the price item. **Note:** The pricing end date cannot be earlier than the pricing start date.	No
Rate Option	Used to indicate the rate option that you want to use while editing the pricing for the price item.	Yes
Claim Template	Used to indicate the claim template of the claim pricing rule for a parent customer.	Yes (Conditional)

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Field Name	Field Description	Mandatory (Yes or No)
		Note: This field is required when you are reapplying for a claim template.

Note: This section also consists of a button, **Reapply**, on clicking the button a message occurs indicating that updating the claim template will reset all the default fields on the pricing rule.

5. Modify the details in the **Main** section, if required.
6. Modify the claim handling fees specified for the line items in a claim pricing rule, if required.
7. Modify the markup or markdown values for the line items in a claim pricing rule, if required.
8. Modify the line items in a claim pricing rule, if required.
9. Add, edit, or remove characteristics for a claim pricing rule, if required.
10. Click **Save**.
    The changes made to a claim pricing rule for a parent customer are saved.

Related Topics

For more information on...	See...
Customer 360° Information - Pricing tab	Customer 360° Information - Pricing Information on page 641
Parent Customer Pricing Rules zone	Parent Customer Pricing Rules on page 643
How to define claim handling fees for line items in a claim pricing rule	Defining the Claim Handling Fees For Line Items in a Claim Pricing Rule on page 2986
How to define markup or markdown values for line items in a claim pricing rule	Defining the Markup or Markdown Values For Line Items in a Claim Pricing Rule on page 2987
How to define a characteristic for a claim pricing rule	Defining a Characteristic for a Claim Pricing Rule on page 2992

Viewing a Claim Pricing Rule of a Parent Customer

Procedure

To view a claim pricing rule of a parent customer:

1. Search for a parent customer whose pricing details you want to view in the **Customer 360° View** screen.
2. In the **Search Results** section, click the **View** (🔗) icon corresponding to the account, person, *or* policy whose pricing details you want to view.
   The **Person** tab appears in the **Customer 360° Information** screen
3. Click the **Pricing** tab.
   The **Pricing** tab appears.
4. In the **Parent Customer Pricing Rules** zone, click the link in the **Pricing Rule Information** column corresponding to the claim pricing rule type whose claim pricing rule parent customer details you want to view.
   The **Claim** screen appears. It contains the following zone:
   - **Claim** - Displays the pricing rule claim details for a parent customer. It contains the following sections:
     - **Main** - Displays the basic details of the claim pricing rule.
     - **Claim Handling Fees** - Displays the claim handling fees defined for the lines items in the claim pricing rule.

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- **Markup or Markdown Values** - Displays the markup or markdown values for the lines items in the claim pricing rule.
- **Line Items** - Displays the associated line items eligible for billing in the claim pricing rule.
- **Characteristics** - Displays the characteristics defined for the claim pricing rule.

5. View the basic details of claim pricing rule in the **Main** section.
6. View the claim handling fees defined for the line items in the **Claim Handling Fees** section.
7. View the markup or markdown values for the lines items in the **Markup or Markdown Values** section.
8. View the associated line items eligible for billing in the **Line Items** section.
9. View the characteristics of the claim pricing rule in the **Characteristics** section.

Related Topics

For more information on...	See...
Customer 360° Information - Pricing tab	Customer 360° Information - Pricing Information on page 641
Parent Customer Pricing Rules zone	Parent Customer Pricing Rules on page 643
Pricing Rule screen	Pricing Rule (Used for Viewing) on page 689
Claim zone	Claim on page 690

Deleting a Claim Pricing Rule of a Parent Customer

Procedure

To delete a claim pricing rule of a parent customer:

1. Search for the account, person, or policy whose pricing details you want to view in the **Customer 360° View** screen.
2. In the **Search Results** section, click the **View** (🔗) icon corresponding to the account, person, or policy whose pricing details you want to view.
   The **Account**, **Person**, or **Policy** tab in the **Customer 360° Information** screen appears.
3. Click the **Pricing** tab, in the **Parent Customer Pricing Rules** zone, click the **Delete** (🗑) icon in the **Delete** column corresponding to the claim pricing rule type whose claim pricing rule you want to delete.
   A message appears confirming whether you want to delete the claim pricing rule.
4. Click **OK**.
   The claim pricing rule of a parent customer is deleted.

Related Topics

For more information on...	See...
Customer 360° Information - Pricing tab	Customer 360° Information - Pricing Information on page 641
Parent Customer Pricing Rules zone	Parent Customer Pricing Rules on page 643

Defining a Claim Pricing Rule for a Bill Group

Prerequisites

To define a claim pricing rule for a bill group, you should have:

- Business Object **C1-PricingRule** defined for pricing rule.
- Business Object **C1-PricingRuleClaim** defined for claim pricing rule.
- Pricing rule type defined in the application.

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- Policy status defined in the application.
- Price item defined in the application.
- Rate options defined in the Rate Option (**C1-ExtLookRateType**) extendable lookup.
- Claim template defined in the Claim Template (**C1-ExtLookClaimTemplate**) extendable lookup.
- Line items defined in the Line Item (**C1-ExtLookPricingRuleLineItem**) extendable lookup.

Procedure

To define a claim pricing rule for a bill group:

1. Search for the account, person, or policy whose pricing details you want to view in the **Customer 360° View** screen.
2. In the **Search Results** section, click the **View** (🔗) icon corresponding to the account, person, or policy whose pricing details you want to view.
   The **Account**, **Person**, or **Policy** tab in the **Customer 360° Information** screen appears.
3. Click the **Pricing** tab and then click the **Add** link in the upper right corner of the **Bill Group ASO Policy Pricing Rules** zone.

   The **Pricing Rule** screen appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Person Name	Indicates the name of the parent customer.	Not applicable
Person Type	Indicates the type of the parent customer.	Not applicable
Pricing Rule Type	Used to indicate the pricing rule type using which you want to create a claim pricing rule for the bill group. **Note:** You can create a claim pricing rule using the **Pricing Rule Type** for claim.	Yes
Pricing Group	Used to indicate the pricing group for the bill group. **Note:** Select the pricing group option when the claim pricing rule has to be defined for a bill group using the pricing group.	No
Policy Status	Used to indicate the policy status for the bill group. The valid values are: • In Force/Active • Post Runout • Runout **Note:** Claim pricing rule cannot be created for **Runout** or **Post Runout** policy statuses, where the policy run out end date is missing.	Yes

4. Click **OK**.

   The **Claim Pricing Rule** screen appears. It contains the following sections:

   - **Customer Information** - Displays the customer information for bill group.
   - **Main** - Used to specify basic details about the claim pricing rule.
   - **Claim Handling Fees** - Used to define the claim handling fees on the lines items for the claim pricing rule.
   - **Markup or Markdown Values** - Used to define the markup or markdown values for the line items in the claim pricing rule.
   - **Line Items** - Used to associate line items eligible for billing in the claim pricing rule.
   - **Characteristics** - Used to define the characteristics for the claim pricing rule.

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The **Customer Information** section contains the following fields:

Field Name	Field Description
Bill Group Information	Displays the bill group information.
Policy Start Date	Displays the date from when the policy is effective.
Policy End Date	Displays the date till when the policy is effective.
Policy Status	Indicates the policy status for the claim pricing rule. The valid values are: • In Force/Active • Post Runout • Runout
Pricing Rule Type	Indicates the pricing rule type.
Status	Indicates the bill group status for the claim pricing rule. The valid values are: • Active • Inactive • Pending

The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Price Item	Used to indicate the price item for which you want to edit the pricing.	Yes
Pricing Start Date	Used to specify the start date from when the pricing will be effective for the price item. **Note:** The pricing start date cannot be later than the pricing end date.	Yes (Conditional) **Note:** Pricing Start Date should be entered if Pricing End Date has been mentioned.
Pricing End Date	Used to specify the end date till when the pricing will be effective for the price item. **Note:** The pricing end date cannot be earlier than the pricing start date.	No
Rate Option	Used to indicate the rate option that you want to use while editing the pricing for the price item.	Yes
Claim Template	Used to indicate the claim template of the claim pricing rule for a bill group.	Yes (Conditional) **Note:** This field is required when you are reapplying for a claim template.

Note: This section also consists of a button, **Reapply**, on clicking the button a message occurs indicating that updating the claim template will reset all the default fields on the pricing rule.

5. Enter the required details in the **Main** section.
6. Define the claim handling fees for the line items in a claim pricing rule, if required.

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> **Note:** The **Claim Handling Fees** section appears when an option from **Claim Template** field is selected.

7. Define the markup or markdown values for the line items in a claim pricing rule, if required.

> **Note:** The **Markup or Markdown Values** section appears when an option from **Claim Template** field is selected.

8. Define line items in a claim pricing rule, if required.

> **Note:** The **Line Items** section appears when an option from **Claim Template** field is selected.

9. Define characteristics for a claim pricing rule, if required.
10. Click **Save**.
    The claim pricing rule for a bill group is defined.

> **Note:** A price list and price assignment is created, the created price list is assigned to the claim pricing rule.

Related Topics

For more information on...	See...
Customer 360° Information - Pricing tab	Customer 360° Information - Pricing Information on page 641
Bill Group ASO Policy Pricing Rules zone	Bill Group Self-Funded Policy Pricing Rules on page 649
How to define claim handling fees for the line items in a claim pricing rule	Defining the Claim Handling Fees For Line Items in a Claim Pricing Rule on page 2986
How to define markup or markdown values for the line items in a claim pricing rule	Defining the Markup or Markdown Values For Line Items in a Claim Pricing Rule on page 2987
How to define a characteristic for a claim pricing rule	Defining a Characteristic for a Claim Pricing Rule on page 2992

Defining a Claim Pricing Rule for a Bill Group Using a Pricing Group

Prerequisites

To define a claim pricing rule for a bill group using a pricing group, you should have:

- Business Object **C1-PricingRule** defined for pricing rule.
- Business Object **C1-PricingRuleClaim** defined for claim pricing rule.
- Pricing rule type defined in the application.
- Pricing group defined in the application.
- Policy status defined in the application.
- Price item defined in the application.
- Rate option defined in the application.
- Claim template defined in the application.

Procedure

To define a claim pricing rule for a bill group using a pricing group:

1. Search for the account, person, or policy whose pricing details you want to view in the **Customer 360° View** screen.
2. In the **Search Results** section, click the **View** (🔗) icon corresponding to the account, person, or policy whose pricing details you want to view.

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The **Account**, **Person**, or **Policy** tab in the **Customer 360° Information** screen appears.

3. Click the **Pricing** tab and then click the **Add** link in the upper right corner of the **Bill Group ASO Policy Pricing Rules** zone.

   The **Pricing Rule** screen appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Person Name	Displays the person name.	Not applicable
Person Type	Displays the person type.	Not applicable
Pricing Rule Type	Used to indicate the pricing rule type to create the pricing rule. **Note:** You can create a claim pricing rule using the **Pricing Rule Type** for claim.	Yes
Pricing Group	Used to indicate the pricing group.	Yes
Policy Status	Used to indicate the policy status for pricing rule. The valid values are: • In Force/Active • Post Runout • Runout **Note:** Claim pricing rule cannot be created for **Runout** or **Post Runout** policy status where the policy run out End Date is missing.	Yes

4. Click **OK**.

   The **Claim Pricing Rule** screen appears. It contains the following sections:

- **Customer Information** - Displays the customer information for bill group using pricing group.
- **Main** - Used to specify basic details about the claim pricing rule.
- **Markup or Markdown Values** - Used to define the markup or markdown values for line items for each rule.
- **Line Items** - Used to associate line items eligible for billing for each rule.
- **Characteristics** - Used to define the characteristics for the claim pricing rule.

The **Customer Information** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Bill Group Information	Displays the bill group information.	Not applicable
Policy Start Date	Displays the policy start date.	Not applicable
Policy End Date	Displays the policy end date.	Not applicable
Policy Status	Indicates the policy status for pricing rule. The valid values are: • In Force/Active • Post Runout • Runout	Not applicable
Pricing Group	Displays the pricing group.	Not applicable
Pricing Rule Type	Indicates the pricing rule type.	Not applicable

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The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Price Item	Used to indicate the price item.	Yes
Pricing Start Date	Used to specify the pricing rule start date. **Note:** This field is enabled when an option from **Price Item** field is selected. By default it displays the **Policy Start Date**.	Yes
Pricing End Date	Used to specify the pricing rule end date. **Note:** This field is enabled when an option from **Price Item** field is selected. By default it displays the **Policy End Date**.	Yes
Rate Option	Used to indicate the rate option to define the claim pricing rule for the price item.	Yes
Claim Template	Used to indicate the claim template to define the claim pricing rule for a bill group. **Note:** This field is enabled for selection when an option from **Price Item** field is selected.	Yes

5. Enter the required details in the **Main** section.
6. Define markup or markdown values for line items for each rule in a claim pricing rule, if required.

> **Note:** The **Markup or Markdown Values** section appears in the rule section and the rule section appears when an option from **Claim Template** field is selected.

7. Define line items for each rule in a claim pricing rule, if required.

> **Note:** The **Line Items** section appears in the rule section and the rule section appears when an option from **Claim Template** field is selected.

8. Define characteristics for a claim pricing rule, if required.
9. Click **Save**.
   The claim pricing rule for a bill group using a pricing group is defined.

> **Note:** A price list and price assignment is created, the price list created is assigned to the claim pricing rule.

Related Topics

For more information on...	See...
Customer 360° Information - Pricing tab	Customer 360° Information - Pricing Information on page 641
Bill Group ASO Policy Pricing Rules zone	Bill Group Self-Funded Policy Pricing Rules on page 649

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For more information on...	See...
How to define markup or markdown values for line items for each rule in a claim pricing rule	Defining the Markup or Markdown Values for Line Items for Each Rule in a Claim Pricing Rule on page 2989
How to define a characteristic for a claim pricing rule	Defining a Characteristic for a Claim Pricing Rule on page 2992

Editing a Claim Pricing Rule of a Bill Group

Prerequisites

To edit a claim pricing rule of a bill group, you should have:

- Business Object **C1-PricingRuleClaim** defined for claim pricing rule.
- Rate options defined in the Rate Option (**C1-ExtLookRateType**) extendable lookup.
- Claim template defined in the Claim Template (**C1-ExtLookClaimTemplate**) extendable lookup.
- Line items defined in the Line Item (**C1-ExtLookPricingRuleLineItem**) extendable lookup.

Procedure

To edit a claim pricing rule of a bill group:

1. Search for the account, person, or policy whose pricing details you want to view in the **Customer 360° View** screen.
2. In the **Search Results** section, click the **View** (🔗) icon corresponding to the account, person, or policy whose pricing details you want to view.
   The **Account**, **Person**, or **Policy** tab in the **Customer 360° Information** screen appears.
3. Click the **Pricing Information** tab.
   The **Pricing Information** tab appears.
4. Click the **Broadcast** (📡) icon in the **Bill Group ASO Policy Information** zone, corresponding to the **Bill Group Information** column, whose bill group details you want to view.
   The **Bill Group ASO Policy Pricing Rules** zone appears.
5. Click the **Edit** (✎) icon in the **Bill Group ASO Policy Pricing Rules** zone, corresponding to the **Pricing Group Information** column, whose pricing details you want to edit.

   The **Claim Pricing Rule** screen appears. It contains the following sections:

   - **Customer Information** - Displays the customer information for the bill group.
   - **Main** - Used to specify basic details about the claim pricing rule.
   - **Claim Handling Fees** - Used to define the claim handling fees on the lines items in the claim pricing rule.
   - **Markup or Markdown Values** - Used to define the markup or markdown values on the lines items in the claim pricing rule.
   - **Line Items** - Used to associate line items eligible for billing.
   - **Characteristics** - Used to define the characteristics for the claim pricing rule.

   The **Customer Information** section contains the following fields:

Column Name	Column Description
Bill Group Information	Displays the bill group name.
Policy Start Date	Displays the date from when the policy is effective.
Policy End Date	Displays the date till when the policy is effective.
Policy Status	Indicates the policy status for the claim pricing rule. The valid values are:

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Column Name	Column Description
	• In Force/Active • Post Runout • Runout
Pricing Rule Type	Indicates the pricing rule type.
Status	Indicates the bill group status for the claim pricing rule. The valid values are: • Active • Inactive • Pending

The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Price Item	Used to indicate the price item for which you want to edit the pricing.	Yes
Pricing Start Date	Used to specify the start date from when the pricing will be effective for the price item. **Note:** The pricing start date cannot be later than the pricing end date.	Yes (Conditional) **Note:** Pricing Start Date should be entered if Pricing End Date has been mentioned.
Pricing End Date	Used to specify the end date till when the pricing will be effective for the price item. **Note:** The pricing end date cannot be earlier than the pricing start date.	No
Rate Option	Used to indicate the rate option that you want to use while editing the pricing for the price item.	Yes
Claim Template	Used to indicate the claim template of the claim pricing rule for a bill group.	Yes

Note: This section also consists of a button, **Reapply**, on clicking the button a message occurs indicating that updating the claim template will reset all the default fields on the pricing rule.

6. Modify the details in the **Main** section, if required.
7. Modify the claim handling fees specified on the line items in a claim pricing rule, if required.
8. Modify the markup or markdown values on the line items in a claim pricing rule, if required.
9. Modify the line items in a claim pricing rule, if required.
10. Add, edit, or remove the characteristics for a claim pricing rule, if required.
11. Click **Save**.
    The changes made to a claim pricing rule for a bill group are saved.

Related Topics

For more information on...	See...
Customer 360° Information - Pricing tab	Customer 360° Information - Pricing Information on page 641

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For more information on...	See...
Bill Group ASO Policy Pricing Rules zone	Bill Group Self-Funded Policy Pricing Rules on page 649
How to define the claim handling fees for line items in a claim pricing rule	Defining the Claim Handling Fees For Line Items in a Claim Pricing Rule on page 2986
How to define the markup or markdown values for line items in a claim pricing rule	Defining the Markup or Markdown Values For Line Items in a Claim Pricing Rule on page 2987
How to define a characteristic for a claim pricing rule	Defining a Characteristic for a Claim Pricing Rule on page 2992

Viewing a Claim Pricing Rule of a Bill Group

Procedure

To view a claim pricing rule of a bill group:

1. Search for a bill group in the **Customer 360° View** screen.
2. In the **Search Results** section, click the **View** (🔗) icon corresponding *t*o the account, person, or policy whose pricing details you want to view.
   The **Person** tab appears in the **Customer 360° Information** screen.
3. Click the **Pricing** tab.
   The **Pricing** tab appears.
4. In the **Bill Group ASO Policy Information** zone, click the **Broadcast** (📡) icon corresponding *t*o the bill group whose claim pricing rule bill group details you want to view.
5. In the **Bill Group ASO Policy Pricing Rules** zone, click the link in the **Pricing Rule Information** column corresponding to the claim pricing rule type whose claim pricing rule bill group you want to view.

   The **Pricing Rule** screen appears. It contains the following zone:

   - **Claim** - Displays the pricing rule claim details for a bill group. It contains the following sections:
     - **Main** - Displays the basic details of the claim pricing rule.
     - **Claim Handling Fees** - Displays the claim handling fees specified for the lines items in the claim pricing rule.
     - **Markup or Markdown Values** - Displays the markup or markdown values for the lines items in the claim pricing rule.
     - **Line Items** - Displays the associated line items eligible for billing.
     - **Characteristics** - Displays the characteristics defined for the claim pricing rule.
6. View the basic details of claim pricing rule in the **Main** section.
7. View the claim handling fees specified for the line items in the **Claim Handling Fees** section.
8. View the markup or markdown values for the line items in the **Markup or Markdown Values** section.
9. View the associated line items eligible for billing in the **Line Items** section.
10. View the characteristics of the claim pricing rule in the **Characteristics** section.

Related Topics

For more information on...	See...
Customer 360° Information - Pricing tab	Customer 360° Information - Pricing Information on page 641

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For more information on...	See...
Bill Group ASO Policy Pricing Rules zone	Bill Group Self-Funded Policy Pricing Rules on page 649
Pricing Rule screen	Pricing Rule (Used for Viewing) on page 689
Claim zone	Claim on page 690

Deleting a Claim Pricing Rule of a Bill Group

Procedure

To delete a claim pricing rule of a bill group:

1. Search for the account, person, or policy whose pricing details you want to view in the **Customer 360° View** screen.
2. In the **Search Results** section, click the **View** (🔗) icon corresponding *t*o the account, person, or policy whose pricing details you want to view.
   The **Account**, **Person**, or **Policy** tab in the **Customer 360° Information** screen appears.
3. Click the **Pricing** tab, in the **Bill Group ASO Policy Pricing Rules** zone, click the **Delete** (🗑) icon in the **Delete** column corresponding *t*o the pricing rule type that you want to delete.
   A message appears confirming whether you want to delete the claim pricing rule.
4. Click **OK**.
   The claim pricing rule of a bill group is deleted.

Related Topics

For more information on...	See...
Customer 360° Information - Pricing tab	Customer 360° Information - Pricing Information on page 641
Bill Group ASO Policy Pricing Rules zone	Bill Group Self-Funded Policy Pricing Rules on page 649

Specific Stop-Loss (SSL) Pricing

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

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

It is the specific stop-loss pricing rule type which helps the system to determine:

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

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

- Algorithm which should be triggered while validating a transaction.

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

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

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

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

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

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

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

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

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

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

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- Accumulation parameters (such as incurred start date, incurred end date, paid start date, paid end date, etc.) based on which you want to accumulate the specific stop-loss for the claim transactions which are processed in the run-in or active period of the policy.
- The maximum limit defined for specific stop-loss at the member or main subscriber level.
- Settlement days which helps to calculate the settlement date (i.e. pricing end date, incurred end date, or paid end date whichever is later + settlement days)
- Whether the Aggregate Specific Stop-Loss (ASSL) should be calculated during the C1-BCSSL batch run for each bill group
- The ASSL limit indicating that the aggregate specific stop-loss amount beyond this limit will be paid by the insurance company to the ASSL credit account.
- Whether any member, main subscriber, or provider is excluded during the specific stop-loss calculation Different SSL limit (i.e. lasered amount) for a member, main subscriber, or provider who are expected to have higher claim amount.

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

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

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

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

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

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

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

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

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

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

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

Defining a Specific Stop-Loss (SSL) Pricing Rule Type

Prerequisites

To define a specific stop-loss (SSL) pricing rule type, you should have:

- Business Object **C1-PricingRuleTypeSSL** defined for pricing rule type.
- Business Object **C1-PricingRuleSSL** defined for pricing rule.
- Pricing rule type category for specific stop-loss defined in the application

Procedure

To define a specific stop-loss pricing rule type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **P** and then click **Pricing Rule Type**.
   A sub-menu appears.
3. Click the **Add** option from the **Pricing Rule Type** sub-menu.

   The **Select Business Object** screen appears. It contains the following field:

Field Name	Field Description	Mandatory (Yes or No)
Pricing Rule Type Business Object	Used to indicate the business object using which you want to create the pricing rule type. **Note:** You can create a specific stop-loss pricing rule type using the **Specific Stop-Loss (SSL) Pricing Rule Type** business object.	Yes

Tip: Alternatively, you can access this screen by clicking the **Add** button in the **Page Title** area of the **Pricing Rule Type** screen.

4. Select the **Specific Stop-Loss (SSL) Pricing Rule Type** business object.
5. Click **OK**.

   The **Specific Stop-Loss (SSL) Pricing Rule Type** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details about the specific stop-loss pricing rule type.
   - **Related Pricing Rule Types** - Used to define the pricing rule types which are related to the parent pricing rule type.
   - **Transaction Field Mapping** - Used to specify the transaction related data mapped to the pricing rule type
   - **Algorithms** - Used to define the algorithms used for the pricing rule type.
   - **Additional Data** - Used to specify the additional information about the pricing rule type.
   - **Price Items** - Used to define the price items assigned to the pricing rule type.
   - **Price Item Parameters** - Used to define the price item parameters in the pricing rule type.
   - **Characteristics** - Used to define the characteristics for the pricing rule type.
   - **SSL-Specific Additional Data** - Used to specify the specific stop-loss related additional data.

   The **Main** section contains the following fields:

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Field Name	Field Description	Mandatory (Yes or No)
Pricing Rule Type	Used to specify the pricing rule type.	Yes
Description	Used to specify the description for the pricing rule type.	Yes
Detailed Description	Used to specify additional information about the pricing rule type.	No
Related Transaction Business Object	Used to indicate the pricing rule business object. The valid values are: • Claim Pricing Rule • Aggregate Stop-Loss (ASL) Pricing Rule • Specific Stop-Loss (SSL) Pricing Rule • Retention Type Claim Based Pricing Rule • Retention Type Enrollment Based Pricing Rule	Yes
Business Object	Indicate the pricing rule type business object for specific stop-loss.	Not applicable
Status	Used to indicate the status of the pricing rule type. The valid values are: • Active • Inactive	Yes
Primary	Used to select the checkbox if the pricing rule type is primary.	No
Pricing Rule Type Category	Used to indicate the pricing rule type category for the pricing rule type. The valid values are: • Claim • Aggregate Stop-Loss • Specific Stop-Loss • Retention Type Claim Based • Retention Type Enrollment Based	Yes

6. Enter the required details in the **Main** section.
7. Add the related pricing rule types in the primary pricing rule type, if required.

Note: Related Pricing Rule Types section appears when the pricing rule type is primary.

8. Define the transaction field mapping in the primary pricing rule type, if required.

Note: Transaction Field Mapping section appears when the pricing rule type is primary.

9. Associate algorithms with the pricing rule type, if required.
10. Define additional data for the pricing rule type, if required.
11. Add pricing items in the pricing rule type, if required.
12. Add price item parameters in the pricing rule type, if required.
13. Define characteristics for the pricing rule type, if required.
14. Add the SSL-Specific data in the pricing rule type, if required.
15. Click **Save**.
    The specific stop-loss pricing rule type is defined.

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Related Topics

For more information on...	See...
Pricing Rule Type screen	Pricing Rule Type on page 2942
How to add the related pricing rule types in the primary pricing rule type	Adding Related Pricing Rule Types in a Primary Pricing Rule Type on page 2959
How to define the transaction field mapping in the primary pricing rule type	Defining Transaction Field Mapping in a Primary Pricing Rule Type on page 2961
How to associate algorithms with the pricing rule type	Associating Algorithms with a Pricing Rule Type on page 2967
How to define additional data for the pricing rule type	Defining Additional Data for a Pricing Rule Type on page 2969
How to add pricing items in the pricing rule type	Adding Price Items in a Pricing Rule Type on page 2971
How to add price item parameters in the pricing rule type	Adding a Price Item Parameter in a Pricing Rule Type on page 2973
How to define a characteristic for the pricing rule type	Defining a Characteristic for a Pricing Rule Type on page 2975
How to add the SSL-Specific data in the pricing rule type	Adding the SSL-Specific Data in a Pricing Rule Type on page 3010

Adding the SSL-Specific Data in a Pricing Rule Type

Procedure

To add the SSL-Specific additional data in a pricing rule type:

1. Ensure that the **SSL-Specific Additional Data** section is expanded when you are *d*efining or editing a pricing rule type.

   The **SSL-Specific Additional Data** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
SSL Billable Charge Line Type	Used to specify the Specific Stop-Loss billable charge line type. **Note:** On clicking the **Search** (🔍) icon that appears corresponding to the **SSL Billable Charge Line Type** field, the **Billable Charge Line Type Search** window appears. On specifying the billable charge line type, the description of the billable charge line type appears corresponding to the **SSL Billable Charge Line Type** field.	No
Domestic Provider Claim Billable Charge Line Type	Used to specify the claim billable charge line type for domestic provider.	No

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Field Name	Field Description	Mandatory (Yes or No)
	Note: On clicking the **Search** (🔍) icon that appears corresponding to the **Domestic Provider Claim Billable Charge Line Type** field, the **Billable Charge Line Type Search** window appears. On specifying the billable charge line type, the description of the billable charge line type appears corresponding to the **Domestic Provider Claim Billable Charge Line Type** field.	
Markup or Markdown Billable Charge Line Type	Used to specify the markup or markdown billable charge line type. **Note:** On clicking the **Search** (🔍) icon that appears corresponding to the **Markup or Markdown Billable Charge Line Type** field, the **Billable Charge Line Type Search** window appears. On specifying the billable charge line type, the description of the billable charge line type appears corresponding to the **Markup or Markdown Billable Charge Line Type** field.	No
Rule Based Billing Eligibility Field	Used to specify whether the rule based field is eligible for billing or not. **Note:** On clicking the **Search** (🔍) icon that appears corresponding to the **Rule Based Billing Eligibility Field** field, the **Field Search** window appears. On specifying the field, the description of the field appears corresponding to the **Rule Based Billing Eligibility Field** field.	No
Rule Based Markup or Markdown Eligibility Field	Used to specify whether the rule based markup or markdown field is eligible for billing or not. **Note:** On clicking the **Search** (🔍) icon that appears corresponding to the **Rule Based Markup or Markdown Eligibility Field** field, the **Field Search** window appears. On specifying the field, the description of the field appears corresponding to the **Rule Based Markup or Markdown Eligibility Field** field.	No

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Field Name	Field Description	Mandatory (Yes or No)
Rule Based Domestic Provider Claim Eligibility Field	Used to specify the rule based domestic provider for claim eligibility field. **Note:** On clicking the **Search** (🔍) icon that appears corresponding to the **Rule Based Domestic Provider Claim Eligibility Field** field, the **Field Search** window appears. On specifying the field, the description of the field appears corresponding to the **Rule Based Domestic Provider Claim Eligibility Field** field.	No

2. Enter the required details in the **SSL-Specific Additional Data** section.
3. Click **Save**.
   The SSL-Specific Additional data is added in the pricing rule type.

Related Topics

For more information on...	See...
How to define a specific stop-loss (SSL) pricing rule type	Defining a Specific Stop-Loss (SSL) Pricing Rule Type on page 3008
How to edit the specific stop-loss (SSL) pricing rule type	Editing a Specific Stop-Loss (SSL) Pricing Rule Type on page 3012

Editing a Specific Stop-Loss (SSL) Pricing Rule Type

Prerequisites

To edit the specific stop-loss (SSL) pricing rule type, you should have:

- Business Object **C1-PricingRuleSSL** defined for pricing rule.
- Pricing rule type category for specific stop-loss (SSL) defined in the application

Procedure

To edit the specific stop-loss (SSL) pricing rule type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **P** and then click **Pricing Rule Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Pricing Rule Type** sub-menu.
   The **Pricing Rule Type** screen appears.
4. In the **Pricing Rule Type List** zone, click the **Edit** (✎) icon in the **Edit** column corresponding *t*o the pricing rule type for specific stop-loss (SSL) whose details you want to edit.

   The **Specific Stop-Loss (SSL) Pricing Rule Type** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details about the specific stop-loss pricing rule type.
   - **Related Pricing Rule Types** - Used to define the pricing rule types which are related to the parent pricing rule type.
   - **Transaction Field Mapping** - Used to specify the transaction related data mapped to the pricing rule type

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- **Algorithms** - Used to define the algorithms used for the pricing rule type.
- **Additional Data** - Used to specify the additional information about the pricing rule type.
- **Price Items** - Used to define the price items assigned to the pricing rule type.
- **Price Item Parameters** - Used to define the price item parameters in the pricing rule type.
- **Characteristics** - Used to define the characteristics for the pricing rule type.
- **SSL-Specific Additional Data** - Used to specify the specific stop-loss additional data.

The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Pricing Rule Type	Displays the pricing rule type.	Not applicable
Description	Used to specify the description for the pricing rule type.	Yes
Detailed Description	Used to specify additional information about the pricing rule type.	No
Related Transaction Business Object	Used to indicate the pricing rule business object. The valid values are: • Claim Pricing Rule • Aggregate Stop-Loss (ASL) Pricing Rule • Specific Stop-Loss (SSL) Pricing Rule • Retention Type Claim Based Pricing Rule • Retention Type Enrollment Based Pricing Rule	Yes
Business Object	Displays the pricing rule type business object for specific stop-loss.	Not applicable
Status	Used to indicate the status of the pricing rule type. The valid values are: • Active • Inactive	Yes
Primary	Used to select the checkbox if the pricing rule type is primary.	No
Pricing Rule Type Category	Used to indicate the pricing rule type category for the pricing rule type. The valid values are: • Claim • Aggregate Stop-Loss • Specific Stop-Loss • Retention Type Claim Based • Retention Type Enrollment Based	Yes

Tip: Alternatively, you can click the **Edit** button in the **Pricing Rule Type** zone to edit the pricing rule type for specific stop-loss.

5. Modify the details in the **Main** section, if required.
6. Add, edit, or remove the related pricing rule types in the primary pricing rule type, if required.
7. Modify the transaction field mapping in the primary pricing rule type, if required.
8. Add, edit, or remove algorithms with the pricing rule type, if required.
9. Modify the additional data for the pricing rule type, if required.
10. Add, edit, or remove pricing items in the pricing rule type, if required.

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11. Add, edit, or remove price item parameters in the pricing rule type, if required.
12. Add, edit, or remove characteristics for the pricing rule type, if required.
13. Modify the SSL-Specific data in the pricing rule type, if required.
14. Click **Save**.
    The changes made to the specific stop-loss pricing rule type are saved.

Related Topics

For more information on...	See...
Pricing Rule Type screen	Pricing Rule Type on page 2942
Pricing Rule Type List zone	Pricing Rule Type List on page 2943
Pricing Rule Type zone	Pricing Rule Type on page 2946
How to add the related pricing rule types in the primary pricing rule type	Adding Related Pricing Rule Types in a Primary Pricing Rule Type on page 2959
How to define the transaction field mapping in the primary pricing rule type	Defining Transaction Field Mapping in a Primary Pricing Rule Type on page 2961
How to associate algorithms with the pricing rule type	Associating Algorithms with a Pricing Rule Type on page 2967
How to define additional data for the pricing rule type	Defining Additional Data for a Pricing Rule Type on page 2969
How to add pricing items in the pricing rule type	Adding Price Items in a Pricing Rule Type on page 2971
How to add price item parameters in the pricing rule type	Adding a Price Item Parameter in a Pricing Rule Type on page 2973
How to define a characteristic for the pricing rule type	Defining a Characteristic for a Pricing Rule Type on page 2975
How to add the SSL-Specific data in the pricing rule type	Adding the SSL-Specific Data in a Pricing Rule Type on page 3010

Deleting a Specific Stop-Loss (SSL) Pricing Rule Type

Procedure

To delete a specific stop-loss pricing rule type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **P** and then click **Pricing Rule Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Pricing Rule Type** sub-menu.
   The **Pricing Rule Type** screen appears.
4. In the **Pricing Rule Type List** zone, click the **Delete** (🗑) icon in the **Delete** column corresponding *t*o the specific stop-loss pricing rule type that you want to delete.
   A message appears confirming whether you want to delete the specific stop-loss pricing rule type.

Note: You can delete a specific stop-loss pricing rule type when it is not yet used in the system.

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> **Tip:** Alternatively, you can delete a specific stop-loss pricing rule type by clicking the **Delete** button in the **Pricing Rule Type** zone.

5. Click **OK**.
   The specific stop-loss pricing rule type is deleted.

Related Topics

For more information on...	See...
Pricing Rule Type screen	Pricing Rule Type on page 2942
Pricing Rule Type List zone	Pricing Rule Type List on page 2943
Pricing Rule Type zone	Pricing Rule Type on page 2946

Viewing the Specific Stop-Loss (SSL) Pricing Rule Type Details

Procedure

To view the details of a specific stop-loss pricing rule type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **P** and then click **Pricing Rule Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Pricing Rule Type** sub-menu.
   The **Pricing Rule Type** screen appears.
4. In the **Pricing Rule Type List** zone, click the **Broadcast** (⦾) icon corresponding to the specific stop-loss *p*ricing rule type whose details you want to view.
   The **Pricing Rule Type** zone appears.
5. View the details of the specific stop-loss pricing rule type in the **Pricing Rule Type** zone.

Related Topics

For more information on...	See...
Pricing Rule Type screen	Pricing Rule Type on page 2942
Pricing Rule Type List zone	Pricing Rule Type List on page 2943
Pricing Rule Type zone	Pricing Rule Type on page 2946

Defining a Specific Stop-Loss Pricing Rule for a Parent Customer

Prerequisites

To define a specific stop-loss pricing rule for a parent customer, you should have:

- Business Object **C1-PricingRule** defined for pricing rule.
- Business Object **C1-PricingRuleSSL** defined for specific stop-loss pricing rule.
- Pricing rule type defined in the application.
- Price item defined in the application.
- Rate option defined in the application.
- Pricing rule usage defined in the application.
- SSL accumulation level defined in the application.

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- Settlement frequency defined in the application.
- Underwriter review defined in the application.

Procedure

To define a specific stop-loss pricing rule for a parent customer:

1. Search for the account, person, or policy whose pricing details you want to view in the **Customer 360° View** screen.
2. In the **Search Results** section, click the **View** (🔗) icon corresponding to the account, person, or policy *w*hose pricing details you want to view.
   The **Account**, **Person**, or **Policy** tab in the **Customer 360° Information** screen appears.
3. Click the **Pricing** tab and then click the **Add** link in the upper right corner of the **Parent Customer Pricing Rules** zone.

   The **Pricing Rule** screen appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Person Name	Displays the person name.	Not applicable
Person Type	Displays the person type.	Not applicable
Pricing Rule Type	Used to indicate the pricing rule type to create the pricing rule. **Note:** You can create a specific stop-loss pricing rule using the **Pricing Rule Type** for specific stop-loss.	Yes

4. Click **OK**.

   The **Specific Stop-Loss (SSL) Pricing Rule** screen appears. It contains the following sections:

   - **Customer Information** - Displays the customer information.
   - **Main** - Used to specify basic details about the specific stop-loss pricing rule.
   - **Accumulation Parameters** - Used to define the accumulation parameters based on which you want to accumulate the specific stop-loss for the transactions which are processed in the run-in or active period of the policy.
   - **Run-In Parameters** - Used to define run-in parameters in the run-in period of the policy.
   - **Lasering and Exclusion** - Used to define the lasering and exclusion information to inherit the accumulation parameters.
   - **Characteristics** - Used to define the characteristics for a specific stop-loss pricing rule.

   The **Customer Information** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Parent Customer Information	Displays the parent customer information	Not applicable
Pricing Rule Type	Indicates the pricing rule type.	Not applicable

   The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Price Item	Used to indicate the price item which you want to define for pricing.	Yes
Pricing Start Date	Used to specify the pricing rule start date.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	Note: This field is enabled when an option from **Price Item** field is selected. By default it displays the **Policy Start Date**.	
Pricing End Date	Used to specify the pricing rule end date. **Note:** This field is enabled when an option from **Price Item** field is selected. By default it displays the **Policy End Date**.	Yes
Rate Option	Used to indicate the rate option which you want to use for defining the specific stop-loss pricing rule for the price item.	Yes
Pricing Rule Usage	Used to indicate whether the pricing rule is used only for pricing or for pricing and billing. The valid values are: • Pricing • Pricing and Billing **Note:** This field is enabled when an option from **Price Item** field is selected.	Yes
SSL Accumulation Level	Used to indicate whether the specific stop-loss must be accumulated at the member or main subscriber level. The valid values are: • Member • Main Subscriber	
Settlement Frequency	Used to indicate the settlement frequency which helps to determine the bill after date. The valid values are: • **Immediately** - The bill after date is not calculated. The specific stop-loss billable charge is billed immediately in the next cycle. • **Manually (At Required Intervals)** - The bill after date specified in the **Manual Settlement Bill After Date** parameter while executing the **C1-BCSSL** batch is stamped on the specific stop-loss billable charge. • **Never** - The bill after date specified in the **Manual Settlement Bill After Date** parameter while executing the **C1-BCSSL** batch is stamped on the specific stop-loss billable charge.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	• **Yearly** - The bill after date in the specific stop-loss billable charge is set to the pricing end date. **Note:** This field is disabled when you select **Pricing and Billing** option from the **Pricing Rule Usage** field.	
Underwriter Review	Used to indicate whether the underwriter settlement review flag is on or off. The valid values are: • Yes • No	Yes
Claim Template	Used to indicate the claim template to define the claim pricing rule for a parent customer. **Note:** This field is enabled for selection when an option from **Price Item** field is selected.	Yes

5. Enter the required details in the **Main** section.
6. Define accumulation parameters in a specific stop-loss pricing rule, if required.

Note: The **Accumulation Parameters** section appears when an option from the **Price Item** field is selected.

7. Define run-in parameters in a specific stop-loss pricing rule, if required.

Note: The **Run-In Parameters** section appears when an option from the **Price Item** field is selected.

8. Define lasering and exclusion information in a specific stop-loss pricing rule, if required.

Note: The **Lasering and Exclusion** section appears when an option from the **Price Item** field is selected.

9. Define characteristics for a specific stop-loss pricing rule, if required.
10. Click **Save**.
    The specific stop-loss pricing rule for a parent customer is defined.

Related Topics

For more information on...	See...
Customer 360° Information - Pricing tab	Customer 360° Information - Pricing Information on page 641
Parent Customer Pricing Rules zone	Parent Customer Pricing Rules on page 643
How to define accumulation parameters in a specific stop-loss pricing rule	Defining Accumulation Parameters in a Specific Stop-Loss Pricing Rule on page 3019
How to define run in parameters in a specific stop-loss pricing rule	Defining Run-in Parameters in a Specific Stop-Loss Pricing Rule on page 3020
How to define lasering and exclusion information in a specific stop-loss pricing rule	Defining Lasering and Exclusion Information in a Specific Stop-Loss Pricing Rule on page 3021
How to define a characteristic for a specific stop-loss pricing rule	Defining a Characteristic for a Specific Stop-Loss Pricing Rule on page 3022

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Defining Accumulation Parameters in a Specific Stop-Loss Pricing Rule

Procedure

To define accumulation parameters in a specific stop-loss pricing rule:

1. Ensure that the **Accumulation Parameters** section is expanded when you have *s*elected an option from the **Price Item** field of **Main** section while defining a specific stop-loss pricing rule.

   The **Accumulation Parameters** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Accumulation Group ID	Displays blank field, accumulation group ID is generated when accumulation parameter values are defined for a specific stop-loss.	Not applicable
Incurred Start Date	Used to specify the incurred start date based on which you want to accumulate the specific stop-loss. **Note:** The accumulated specific stop-loss for claim transactions are processed in the run-in or active period of the policy.	Yes
Incurred End Date	Used to specify the incurred end date based on which you want to accumulate the specific stop-loss. **Note:** The accumulated specific stop-loss for claim transactions are processed in the run-in or active period of the policy.	Yes
SSL Payout Limit	Used to specify the maximum limit defined for specific stop-loss at the member or main subscriber level.	Yes
Paid Start Date	Used to specify the paid start date based on which you want to accumulate the specific stop-loss. **Note:** The accumulated specific stop-loss for claim transactions are processed in the run-in or active period of the policy.	Yes
Paid End Date	Used to specify the paid end date based on which you want to accumulate the specific stop-loss. **Note:** The accumulated specific stop-loss for claim transactions are processed in the run-in or active period of the policy.	Yes
Settlement Days	Used to indicate the settlement days which helps to calculate the settlement date. **Note:** Settlement date is calculated as the pricing end date, incurred end date, or paid end date whichever is later added with the settlement days.	Yes
Compute Aggregate SSL (ASSL)	Used to indicate whether the aggregate specific stop-loss (ASSL) should be calculated or not during the **C1-BCSSL** batch run for each bill group. The valid values are: • Yes • No	Yes

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Field Name	Field Description	Mandatory (Yes or No)
ASSL Credit Count	Used to indicate that the aggregate specific stop-loss amount beyond the ASSL limit will be paid by the insurance company to the ASSL credit account. **Note:** This field is enabled when you select **Yes** option from the **Compute Aggregate SSL (ASSL)** field.	Yes
ASSL Limit	**Note:** This field is enabled when you select **Yes** option from the **Compute Aggregate SSL (ASSL)** field.	Yes

2. Enter the required details in the **Accumulation Parameters** section.
3. Click **Save**.
   The accumulation parameters are defined in the specific stop-loss pricing rule.

Related Topics

For more information on...	See...
How to define a specific stop-loss pricing rule for a parent customer	Defining a Specific Stop-Loss Pricing Rule for a Parent Customer on page 3015
How to edit a specific stop-loss pricing rule of a parent customer	Editing a Specific Stop-Loss Pricing Rule of a Parent Customer on page 3023

Defining Run-in Parameters in a Specific Stop-Loss Pricing Rule

Procedure

To define run-in parameters in a specific stop-loss pricing rule:

1. Ensure that the **Run-In Parameters** section is expanded when you have selected an option from the **Price Item** field of **Main** section while defining a specific stop-loss pricing rule.

   The **Run-In Parameters** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Run-In	Used to specify whether the run-in parameters of the run-in period of policy are to be considered or not in a specific stop-loss pricing	No
Incurred Start Date	Used to specify the incurred start date based on the run-in period of the policy in the specific stop-loss. **Note:** This field is enabled when you select the checkbox for the **Run-In** field.	Yes
Incurred End Date	Used to specify the incurred end date based on the run-in period of the policy in the specific stop-loss. **Note:** This field is enabled when you select the checkbox for the **Run-In** field.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
Paid Start Date	Used to specify the paid start date based on the run-in period of the policy in the specific stop-loss. **Note:** This field is enabled when you select the checkbox for the **Run-In** field.	Yes
Paid End Date	Used to specify the paid end date based on the run-in period of the policy in the specific stop-loss. **Note:** This field is enabled when you select the checkbox for the **Run-In** field.	Yes

2. Enter the required details in the **Run-In Parameters** section.
3. Click **Save**.
   The run-in parameters are defined in the specific stop-loss pricing rule.

Related Topics

For more information on...	See...
How to define a specific stop-loss pricing rule for a parent customer	Defining a Specific Stop-Loss Pricing Rule for a Parent Customer on page 3015
How to edit a specific stop-loss pricing rule of a parent customer	Editing a Specific Stop-Loss Pricing Rule of a Parent Customer on page 3023

Defining Lasering and Exclusion Information in a Specific Stop-Loss Pricing Rule

Prerequisites

To define lasering and exclusion information in a specific stop-loss pricing rule, you should have:

- Lasering or exclusion level defined in the application.
- Exception type defined in the application.

Procedure

To define lasering and exclusion information in a specific stop-loss pricing rule:

1. Ensure that the **Lasering and Exclusion** section is expanded when you have selected an option from the **Price Item** field of **Main** section while defining a specific stop-loss pricing rule.

   The **Lasering and Exclusion** section contains the following columns in a grid:

Column Name	Column Description	Mandatory (Yes or No)
Accumulation Group ID	Displays blank column, accumulation group ID is generated when accumulation parameter values are defined for a specific stop-loss.	Not applicable
Level Identifier	Used to specify the lasering or exclusion level identifier.	Yes

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Column Name	Column Description	Mandatory (Yes or No)
Lasering or Exclusion Level	Used to indicate the lasering or exclusion in a specific stop-loss. The valid values are: • Main Subscriber • Member • Provider	Yes
Exception Type	Used to indicate the exception type. The valid values are: • Lasering • Exclusion **Note:** This field displays **Exclusion** option and is disabled on selection of **Provider** option from the **Lasering or Exclusion Level** column.	Yes
Comments	Used to specify the comments.	No
Lasered Amount	Used to specify the lasered amount.	Yes (Conditional)
	Note: This field is disabled when **Exclusion** option is selected from the **Exception Type** column.	**Note:** This column is mandatory when **Lasering** option is selected from the **Exception Type** column.

2. Enter the required details in the **Lasering and Exclusion** section.
3. If you want to define more than one lasering and exclusion information in a specific stop-loss pricing rule, click the **Add** (+) icon and then repeat step 2.

Note: However, if you want to remove a lasering and exclusion information from the specific stop-loss pricing rule, click the **Delete** (🗑) icon corresponding to the level identifier.

4. Click **Save**.
   The lasering and exclusion information is defined in a specific stop-loss pricing rule.

Related Topics

For more information on...	See...
How to define a specific stop-loss pricing rule for a parent customer	Defining a Specific Stop-Loss Pricing Rule for a Parent Customer on page 3015
How to edit the specific stop-loss pricing rule for a parent customer	Editing a Specific Stop-Loss Pricing Rule of a Parent Customer on page 3023

Defining a Characteristic for a Specific Stop-Loss Pricing Rule

Prerequisites

To define a characteristic for a specific stop-loss pricing rule, you should have:

- Characteristic types defined in the application (where the characteristic entity is set to **Pricing Rule**)

Procedure

To define a characteristic for a specific stop-loss pricing rule:

1. Ensure that the **Characteristics** section is expanded when you are defining or editing a pricing rule.

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The **Characteristics** section contains the following columns in a grid:

Column Name	Column Description	Mandatory (Yes or No)
Effective Date	Used to specify the date from when the characteristic is effective for the specific stop-loss pricing rule.	Yes (Conditional) **Note:** This field is required when you are defining a characteristic for the specific stop-loss pricing rule.
Characteristic Type	Used to indicate the characteristic type. **Note:** The list includes only those characteristic types where the characteristic entity is set to **Pricing Rule**.	Yes (Conditional) **Note:** This field is required when you are defining a characteristic for the specific stop-loss pricing rule.
Characteristic Value	Used to specify the value for the characteristic type. **Note:** If you select a predefined characteristic type, the **Search** (🔍) icon appears corresponding to the **Characteristic Value** field. On clicking the **Search** icon, the **Predefined Characteristic Search** window appears. On specifying the value for a predefined characteristic type, the description of the characteristic value appears corresponding to the **Characteristic Value** field.	Yes (Conditional) **Note:** This field is required when you are defining a characteristic for the specific stop-loss pricing rule.

2. Enter the required details in the **Characteristics** section.
3. If you want to define more than one characteristic for the specific stop-loss pricing rule, click the **Add** (+) icon and then repeat step 2.

> **Note:** However, if you want to remove a characteristic from the specific stop-loss pricing rule, click the **Delete** (🗑) icon corresponding to the characteristic.

4. Click **Save**.
   The characteristics are defined for the specific stop-loss pricing rule.

Related Topics

For more information on...	See...
How to define a specific stop-loss pricing rule for a parent customer	Defining a Specific Stop-Loss Pricing Rule for a Parent Customer on page 3015
How to edit the specific stop-loss pricing rule for a parent customer	Editing a Specific Stop-Loss Pricing Rule of a Parent Customer on page 3023

Editing a Specific Stop-Loss Pricing Rule of a Parent Customer

Prerequisites

To edit a specific stop-loss pricing rule of a parent customer, you should have:

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- Business Object **C1-PricingRuleSSL** defined for specific stop-loss pricing rule.
- Pricing rule usage defined in the application.
- SSL accumulation level defined in the application.
- Underwriter review defined in the application.

Procedure

To edit a specific stop-loss pricing rule of a parent customer:

1. Search for the account, person, or policy whose pricing details you want to view in the **Customer 360° View** screen.
2. In the **Search Results** section, click the **View** (🔗) icon corresponding to the account, person, or policy whose pricing details you want to view.
   The **Account**, **Person**, or **Policy** tab in the **Customer 360° Information** screen appears.
3. Click the **Pricing** tab, in the **Parent Customer Pricing Rules** zone click the **Edit** (🔗) icon in the **Edit** column corresponding to the pricing rule type for specific stop-loss whose specific stop-loss pricing rule details you want to edit.

   The **Specific Stop-Loss (SSL) Pricing Rule** screen appears. It contains the following sections:

   - **Customer Information** - Displays the customer information.
   - **Main** - Used to specify basic details about the specific stop-loss pricing rule.
   - **Accumulation Parameters** - Used to define the accumulation parameters based on which you want to accumulate the specific stop-loss for the transactions which are processed in the run-in or active period of the policy.
   - **Run-In Parameters** - Used to define run-in parameters in the run-in period of the policy.
   - **Lasering and Exclusion** - Used to define the lasering and exclusion information to inherit the accumulation parameters.
   - **Characteristics** - Used to define the characteristics for a specific stop-loss pricing rule.

   The **Customer Information** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Parent Customer Information	Displays the parent customer information	Not applicable
Pricing Rule Type	Indicates the pricing rule type.	Not applicable

   The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Price Item	Indicates the price item defined for pricing.	Not applicable
Pricing Start Date	Used to specify the pricing rule start date.	Yes
Pricing End Date	Used to specify the pricing rule end date.	Yes
Rate Option	Indicates the rate option used for defining the specific stop-loss pricing rule for the price item.	Not applicable
Pricing Rule Usage	Used to indicate whether the pricing rule is used only for pricing or for pricing and billing. The valid values are: • Pricing • Pricing and Billing	Yes
SSL Accumulation Level	Used to indicate whether the specific stop-loss must be accumulated at the member or main subscriber level. The valid values are:	

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Field Name	Field Description	Mandatory (Yes or No)
	• Member • Main Subscriber	
Settlement Frequency	Indicates the settlement frequency to determine the bill after date. The valid values are: • **Immediately** - The bill after date is not calculated. The specific stop-loss billable charge is billed immediately in the next cycle. • **Manually (At Required Intervals)** - The bill after date specified in the **Manual Settlement Bill After Date** parameter while executing the **C1-BCSSL** batch is stamped on the specific stop-loss billable charge. • **Never** - • **Yearly** - The bill after date in the specific stop-loss billable charge is set to the pricing end date. **Note:** This field is disabled when you select **Pricing and Billing** option from the **Pricing Rule Usage** field.	Not applicable
Underwriter Review	Used to indicate whether the underwriter settlement review flag is on or off. The valid values are: • Yes • No	Yes

4. Modify the details in the **Main** section, if required.
5. Modify the accumulation parameters in a specific stop-loss pricing rule, if required.
6. Modify the run-in parameters in a specific stop-loss pricing rule, if required.
7. Add, edit, or remove the lasering and exclusion information for the specific stop-loss pricing rule, if required.
8. Add, edit, or remove characteristics for the specific stop-loss pricing rule, if required.
9. Click **Save**.
   The changes made to a specific stop-loss pricing rule for a parent customer are saved.

Related Topics

For more information on...	See...
Customer 360° Information - Pricing tab	Customer 360° Information - Pricing Information on page 641
Parent Customer Pricing Rules zone	Parent Customer Pricing Rules on page 643
How to define accumulation parameters in a specific stop-loss pricing rule	Defining Accumulation Parameters in a Specific Stop-Loss Pricing Rule on page 3019
How to define run-in parameters in a specific stop-loss pricing rule	Defining Run-in Parameters in a Specific Stop-Loss Pricing Rule on page 3020
How to define lasering and exclusion information in a specific stop-loss pricing rule	Defining Lasering and Exclusion Information in a Specific Stop-Loss Pricing Rule on page 3021

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For more information on...	See...
How to define a characteristic for a specific stop-loss pricing rule	Defining a Characteristic for a Specific Stop-Loss Pricing Rule on page 3022

Viewing a Specific Stop-Loss Pricing Rule of a Parent Customer

Procedure

To view a specific stop-loss pricing rule of a parent customer:

1. Search for the account, person, or policy whose pricing details you want to view in the **Customer 360° View** screen.
2. In the **Search Results** section, click the **View** (🔗) icon corresponding to the account, person, or policy whose pricing details you want to view.
   The **Account**, **Person**, or **Policy** tab in the **Customer 360° Information** screen appears.
3. Click the **Pricing** tab.
4. In the **Parent Customer Pricing Rules** zone, click the link in the **Pricing Rule Information** column corresponding to the specific stop-loss pricing rule type whose specific stop-loss pricing rule parent customer details you want to view.
   The **Pricing Rule** screen appears. It contains the following zone:
   - **Specific Stop-Loss** - Displays the pricing rule specific stop-loss details for a parent customer. It contains the following sections:
     - **Main** - Displays the basic details of the specific stop-loss pricing rule.
     - **Accumulation Parameters** - Displays the accumulation parameters based on which accumulated specific stop-loss for the transactions are processed in the run-in or active period of the policy.
     - **Run-In Parameters** - Displays the run-in parameters in the run-in period of the policy.
     - **Lasering and Exclusion** - Displays the lasering and exclusion information that inherits the accumulation parameters
     - **Characteristics** - Displays the characteristics defined for the specific stop-loss pricing rule.
5. View the basic details of specific stop-loss pricing rule in the **Main** zone.
6. View the accumulated parameters in the **Accumulation Parameters** zone.
7. View the run-in parameters in the **Run-In Parameters** zone.
8. View the lasering and exclusion information in the **Lasering and Exclusion** zone.
9. View the characteristics of the specific stop-loss pricing rule in the **Characteristics** zone.

Related Topics

For more information on...	See...
Customer 360° Information - Pricing tab	Customer 360° Information - Pricing Information on page 641
Parent Customer Pricing Rules zone	Parent Customer Pricing Rules on page 643
Pricing Rule screen	Pricing Rule (Used for Viewing) on page 689
Specific Stop-Loss zone	Specific Stop-Loss on page 698

Deleting a Specific Stop-Loss Pricing Rule of a Parent Customer

Procedure

To delete a specific stop-loss pricing rule of a parent customer:

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1. Search for the account, person, or policy whose pricing details you want to view in the **Customer 360° View** screen.
2. In the **Search Results** section, click the **View** (🔗) icon corresponding to the account, person, or policy *w*hose pricing details you want to view.
   The **Account**, **Person**, or **Policy** tab in the **Customer 360° Information** screen appears.
3. Click the **Pricing** tab, in the **Parent Customer Pricing Rules** zone, click the **Delete** (🗑) icon in the **Delete** column corresponding to the specific stop-loss pricing rule type whose specific stop-loss pricing rule you want to delete.
   A message appears confirming whether you want to delete the specific stop-loss pricing rule.
4. Click **OK**.
   The specific stop-loss pricing rule is deleted.

Related Topics

For more information on...	See...
Customer 360° Information - Pricing tab	Customer 360° Information - Pricing Information on page 641
Parent Customer Pricing Rules zone	Parent Customer Pricing Rules on page 643

Defining a Specific Stop-Loss Pricing Rule for a Bill Group

Prerequisites

To define a specific stop-loss pricing rule for a bill group, you should have:

- Business Object **C1-PricingRule** defined for pricing rule.
- Business Object **C1-PricingRuleSSL** defined for specific stop-loss pricing rule.
- Pricing rule type defined in the application.
- Policy status defined in the application.
- Price item defined in the application.
- Rate option defined in the application.
- Values defined for the **Reinsurer Person Relationship Type** option type in the **C1-ASOBLLNG** feature configuration.

Procedure

To define a specific stop-loss pricing rule for a bill group:

1. Search for the account, person, or policy whose pricing details you want to view in the **Customer 360° View** screen.
2. In the **Search Results** section, click the **View** (🔗) icon corresponding to the account, person, or policy *w*hose pricing details you want to view.
   The **Account**, **Person**, or **Policy** tab in the **Customer 360° Information** screen appears.
3. Click the **Pricing** tab and then click the **Add** link in the upper right corner of the **Bill Group ASO Policy Pricing Rules** zone.

   The **Pricing Rule** screen appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Person Name	Displays the person name.	Not applicable
Person Type	Displays the person type.	Not applicable
Pricing Rule Type	Used to indicate the pricing rule type to create the pricing rule. **Note:** You can create a specific stop-loss pricing rule using the **Pricing Rule Type** for specific stop-loss.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
Pricing Group	Used to indicate the pricing group.	No
Policy Status	Used to indicate the policy status for pricing rule. The valid values are: • In Force/Active • Post Runout • Runout **Note:** Specific stop-loss pricing rule cannot be created for **Runout** or **Post Runout** policy status where the policy run out end date is missing.	Yes

4. Click **OK**.

The **Specific Stop-Loss (SSL) Pricing Rule** screen appears. It contains the following sections:

- **Customer Information** - Displays the customer information for bill group.
- **Main** - Used to specify basic details about the specific stop-loss pricing rule.
- **Accumulation Criteria** - Used to define the accumulation criteria in a specific stop-loss pricing rule.
- **Pricing Information** - Used to define stop-loss eligibility for claim line items.
- **Characteristics** - Used to define the characteristics for the specific stop-loss pricing rule.

The **Customer Information** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Bill Group Information	Displays the bill group information.	Not applicable
Policy Start Date	Displays the policy start date.	Not applicable
Policy End Date	Displays the policy end date.	Not applicable
Policy Status	Indicates the policy status for pricing rule. The valid values are: • In Force/Active • Post Runout • Runout	Not applicable
Pricing Rule Type	Indicates the pricing rule type.	Not applicable

The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Price Item	Used to indicate the price item. **Note:** Once an option is selected for this field, the field appears disabled.	Yes
Parent Customer's SSL Pricing Rules	Used to indicate the pricing date range derived from the parent customer's specific stop-loss pricing rule. **Note:** This field is enabled for selection when an option from **Price Item** field is selected.	Yes
Pricing Start Date	Displays the pricing rule start date.	Not applicable

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Field Name	Field Description	Mandatory (Yes or No)
	Note: This field displays the **Policy Start Date**.	
Pricing End Date	Displays the pricing rule end date. **Note:** This field displays the **Policy End Date**.	Not applicable
Rate Option	Used to indicate the rate option to define the specific stop-loss pricing rule for the price item. **Note:** Rate options in this field appears for selection, when you select an option from the **Price Item** field.	Yes
Reinsurer Account	Used to indicate the account of the reinsurer person (associated with the parent customer of the bill group) which you want to use for defining the specific stop-loss pricing rule for the price item.	No

5. Enter the required details in the **Main** section.
6. Define accumulation criteria in a specific stop-loss pricing rule, if required.

Note:

The **Accumulation Criteria** section appears when an option from **Parent Customer's SSL Pricing Rules** field is selected.

You can also define the **Accumulation Criteria** for each rule in a specific stop-loss pricing rule.

7. Define stop-loss eligibility for claim line items, if required.

Note:

The **Pricing Information** section appears when an option from **Parent Customer's SSL Pricing Rules** field is selected.

You can also define the **Pricing Information** for each rule in a specific stop-loss pricing rule.

8. Define characteristics for a specific stop-loss pricing rule, if required.
9. Click **Save**.
   The specific stop-loss pricing rule for a bill group is defined.

Note: A price list and price assignment is created, the price list created is assigned to the specific stop-loss pricing rule.

Related Topics

For more information on...	See...
Customer 360° Information - Pricing Information tab	Customer 360° Information - Pricing Information on page 641
Bill Group ASO Policy Pricing Rules zone	Bill Group Self-Funded Policy Pricing Rules on page 649
How to define accumulation criteria in a specific stop-loss pricing rule	Defining Accumulation Criteria in a Specific Stop-Loss Pricing Rule on page 3030
How to define claim pricing information in a specific stop loss pricing rule	Defining Claim Pricing Information in a Specific Stop Loss Pricing Rule on page 3032

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For more information on...	See...
How to define a characteristic for a specific stop-loss pricing rule	Defining a Characteristic for a Specific Stop-Loss Pricing Rule on page 3022

Defining Accumulation Criteria in a Specific Stop-Loss Pricing Rule

Procedure

To define accumulation criteria in a specific stop-loss pricing rule:

1. Ensure that the **Accumulation Criteria** section is expanded when you have selected an option from the **Parent Customer's SSL Pricing Rules** field of **Main** section while defining or editing a specific stop-loss pricing rule.

   The **Accumulation Criteria** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Accumulation Group ID	Displays blank field, accumulation group ID is generated when accumulation criteria values are defined for a specific stop-loss.	Not applicable
Run-In Maximum Limit	Used to specify the maximum specific stop-loss limit defined for the member when the claim transactions are received in the run-in period of the policy. **Note:** This field is enabled when the start date and end date selected from the **Parent Customer's SSL Pricing Rules** field of **Main** section is greater than today's date.	Yes
SSL Limit	Used to specify whether the SSL limit indicating that the specific stop-loss amount beyond this limit will be paid by the insurance company.	Yes
Price Item	Used to specify the price item information. **Note:** On clicking the **Search** (🔍) icon that appears corresponding to the **Price Item** field, the **Price Item Search** window appears.	No
Price Item Parameters	This field contains the following columns: **Column Name** / **Column Description** / **Mandatory (Yes or No)** Price Item Parameter / Used to specify multiple parameters based on which you want to determine the price item utilization. / No	No

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Field Name	Field Description			Mandatory (Yes or No)
	Column Name	**Column Description**	**Mandatory (Yes or No)**	
		Note: On clicking the **Search** (🔍) icon that appears corresponding to the **Price Item Parameter** field, the **Price Item Parameter Search** window appears.		
	Parameter Value	Used to specify the value of the parameter. **Note:** On selecting the **Price Item Parameter**, the **Search** (🔍) icon appears corresponding to this field, and on clicking the icon, the **Parameter Value Search** window appears.	No	

2. Enter the required details in the **Accumulation Criteria** section.
3. If you want to define more than one price item in the accumulation group, click the **Add** (+) icon and then repeat step 2.

> **Note:** However, if you want to remove a price item from the accumulation group, click the **Delete** (🗑) icon corresponding to the price item.

4. If you want to define more than one price item parameters for the price item, click the **Add** (+) icon and then repeat step 2.

> **Note:** However, if you want to remove a price item parameter from the price item, click the **Delete** (🗑) icon corresponding to the price item parameter.

5. Click **Save**.
   The accumulation criteria is defined in the specific stop-loss pricing rule.
6. You can define accumulation rules for each rule in a specific stop-loss pricing rule.

> **Note:** You can exclude a rule from the specific stop-loss pricing by selecting the **Exclude Rule** checkbox.

Related Topics

For more information on...	See...
How to define a specific stop-loss pricing rule for a bill group	Defining a Specific Stop-Loss Pricing Rule for a Bill Group on page 3027
How to edit a specific stop-loss pricing rule of a bill group	Editing a Specific Stop-Loss Pricing Rule of a Bill Group on page 3036

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Defining Claim Pricing Information in a Specific Stop Loss Pricing Rule

Procedure

To define the stop-loss eligibility for claim line items:

1. Ensure that the **Pricing Information** section is expanded when you have selected an option from the **Parent Customer's SSL Pricing Rules** field of **Main** section while defining or editing a specific stop-loss pricing rule.

   The **Pricing Information** section contains the following section:

   - **Claim Pricing Rule** - Used to indicate the claim pricing rule. It contains the following sub-sections:
     - **Domestic Provider Claims** - Used to specify the domestic provider claim while calculating specific stop-loss.
     - **Markup or Markdown Values** - Used to define the markup or markdown values for billable charge line.
     - **Line Items** - Used to associate line items eligible for billing.

   The **Claim Pricing Rule** section contains the following field:

Field Name	Field Description	Mandatory (Yes or No)
Effective Claim Pricing Rule	Used to indicate the claim pricing rule effective for pricing.	No

   On clicking the **Reapply Claim Template** button to the right side of the **Effective Claim Pricing Rule** field you can reapply for claim pricing rule.

   Note: The **Reapply Claim Template** button appears when you are editing a specific stop-loss.

   The **Domestic Provider Claims** section contains the following field:

Field Name	Field Description	Mandatory (Yes or No)
Exclude SSL (Percentage)	Used to specify the domestic provider claim billable charge line excluding the specific stop-loss in percentage to create domestic provider claim calculation lines.	No

   The **Markup or Markdown Values** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Pricing Strategy	Indicates the pricing strategy. The valid values are: • Markdown • Markup • None	Not applicable
Markup or Markdown Type	Indicates the markup or markdown value type for claim line items. The valid values are: • Flat Amount • Percentage	Not applicable
Markup or Markdown Amount	Displays the markup or markdown amount. **Note:** This field displays amount when **Markup or Markdown Type** field is **Flat Amount**.	Not applicable

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The **Line Items** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Sequence	Displays the sequence number for the line items.	Not applicable
Line Item	Displays the billing line items.	Not applicable
Eligible for Specific Stop-Loss	Used to specify whether the line item is eligible or not eligible for specific stop-loss.	No
Markup or Markdown Percentage Eligibility	Displays whether the line item is eligible or not eligible for markup or markdown percentage. The valid values are: • Eligible • Not Eligible	Not applicable
Markup or Markdown Percentage	Displays the percentage for markup or markdown value.	Not applicable

2. Select the required details in the **Claim Pricing Rule** section, if required.
3. Enter the required details in the **Domestic Provider Claims** section, if required.
4. Select the required details in the **Line Items** section, if required.
5. Click **Save**.
   The claim line items are defined in the specific stop-loss pricing rule.
6. You can define eligibility claim line items for each rule in a specific stop-loss pricing rule.

Note: You can exclude a rule from the specific stop-loss pricing by selecting the **Exclude Rule** checkbox.

Related Topics

For more information on...	See...
How to define a specific stop-loss pricing rule for a bill group	Defining a Specific Stop-Loss Pricing Rule for a Bill Group on page 3027
How to edit a specific stop-loss pricing rule of a bill group	Editing a Specific Stop-Loss Pricing Rule of a Bill Group on page 3036

Defining a Specific Stop-Loss Pricing Rule for a Bill Group Using a Pricing Group

Prerequisites

To define a specific stop-loss pricing rule for a bill group using a pricing group, you should have:

- Business Object **C1-PricingRule** defined for pricing rule.
- Business Object **C1-PricingRuleSSL** defined for specific stop-loss pricing rule.
- Pricing rule type defined in the application.
- Pricing group defined in the application.
- Policy status defined in the application.
- Price item defined in the application.
- Rate option defined in the application.

Procedure

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To define a specific stop-loss pricing rule for a bill group using a pricing group:

1. Search for the account, person, or policy whose pricing details you want to view in the **Customer 360° View** screen.
2. In the **Search Results** section, click the **View** (🔗) icon corresponding to the account, person, or policy *w*hose pricing details you want to view.
   The **Account**, **Person**, or **Policy** tab in the **Customer 360° Information** screen appears.
3. Click the **Pricing** tab and then click the **Add** link in the upper right corner of the **Bill Group ASO Policy Pricing Rules** zone.

   The **Pricing Rule** screen appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Person Name	Displays the person name.	Not applicable
Person Type	Displays the person type.	Not applicable
Pricing Rule Type	Used to indicate the pricing rule type to create the pricing rule. **Note:** You can create a specific stop-loss pricing rule using the **Pricing Rule Type** for specific stop-loss.	Yes
Pricing Group	Used to indicate the pricing group.	Yes
Policy Status	Used to indicate the policy status for pricing rule. The valid values are: • In Force/Active • Post Runout • Runout **Note:** Specific stop-loss pricing rule cannot be created for **Runout** or **Post Runout** policy status where the policy run out End Date is missing.	Yes

4. Click **OK**.

   The **Specific Stop-Loss (SSL) Pricing Rule** screen appears. It contains the following sections:

   - **Customer Information** - Displays the customer information for bill group using pricing group.
   - **Main** - Used to specify basic details about the claim pricing rule.
   - **Markup or Markdown Values** - Used to define the markup or markdown values for billable charge line for each rule.
   - **Line Items** - Used to associate line items eligible for billing for each rule.
   - **Characteristics** - Used to define the characteristics for the claim pricing rule.

   The **Customer Information** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Bill Group Information	Displays the bill group information.	Not applicable
Policy Start Date	Displays the policy start date.	Not applicable
Policy End Date	Displays the policy end date.	Not applicable
Policy Status	Indicates the policy status for pricing rule. The valid values are: • In Force/Active • Post Runout	Not applicable

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Field Name	Field Description	Mandatory (Yes or No)
	• Runout	
Pricing Group	Displays the pricing group.	Not applicable
Pricing Rule Type	Indicates the pricing rule type.	Not applicable

The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Price Item	Used to indicate the price item. **Note:** Once an option is selected for this field, the field appears disabled.	Yes
Parent Customer's SSL Pricing Rules	Used to indicate the pricing date range derived from the parent customer's specific stop-loss pricing rule. **Note:** This field is enabled for selection when an option from **Price Item** field is selected.	Yes
Pricing Start Date	Displays the pricing rule start date.	Yes
Pricing End Date	Displays the pricing rule end date.	Yes
Rate Option	Used to indicate the rate option to define the specific stop-loss pricing rule for the price item. **Note:** Rate options in this field appears for selection, when you select an option from the **Price Item** field.	Yes

5. Enter the required details in the **Main** section.
6. Define accumulation criteria for each rule in a specific stop-loss pricing rule pricing rule, if required.

Note: The **Accumulation Criteria** section appears in the rule section and the rule section appears when an option from **Parent Customer's SSL Pricing Rules** field is selected.

7. Define stop-loss eligibility for claim line items, if required.

Note: The **Pricing Information** section appears in the rule section and the rule section appears when an option from **Parent Customer's SSL Pricing Rules** field is selected.

8. Define characteristics for a specific stop-loss pricing rule, if required.
9. Click **Save**.
   The specific stop-loss pricing rule for a bill group using a pricing group is defined.

Note: A price list and price assignment is created, the price list created is assigned to the specific stop-loss pricing rule.

Related Topics

For more information on...	See...
Customer 360° Information - Pricing tab	Customer 360° Information - Pricing Information on page 641

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For more information on...	See...
Bill Group ASO Policy Pricing Rules zone	Bill Group Self-Funded Policy Pricing Rules on page 649
How to define Accumulation Criteria in a specific stop-loss pricing rule	Defining Accumulation Criteria in a Specific Stop-Loss Pricing Rule on page 3030
How to define claim pricing information in a specific stop loss pricing rule	Defining Claim Pricing Information in a Specific Stop Loss Pricing Rule on page 3032
How to define a characteristic for a specific stop-loss pricing rule	Defining a Characteristic for a Specific Stop-Loss Pricing Rule on page 3022

Editing a Specific Stop-Loss Pricing Rule of a Bill Group

Prerequisites

To edit a specific stop-loss pricing rule of a bill group, you should have:

- Business Object **C1-PricingRuleSSL** defined for specific stop-loss pricing rule.
- Values defined for the **Reinsurer Person Relationship Type** option type in the **C1-ASOBLLNG** feature configuration.

Procedure

To edit a specific stop-loss pricing rule of a bill group:

1. Search for the account, person, or policy whose pricing details you want to view in the **Customer 360° View** screen.
2. In the **Search Results** section, click the **View** (🔗) icon corresponding to the account, person, *or* policy whose pricing details you want to view.
   The **Account**, **Person**, or **Policy** tab in the **Customer 360° Information** screen appears.
3. Click the **Pricing** tab, in the **Bill Group ASO Policy Pricing Rules** zone click the **Edit** (✎) icon in the **Edit** column corresponding to the pricing rule type for specific stop-loss whose specific stop-loss pricing rule details you want to edit.

   The **Specific Stop-Loss (SSL) Pricing Rule** screen appears. It contains the following sections:

   - **Customer Information** - Displays the customer information for bill group.
   - **Main** - Displays the basic details of the specific stop-loss pricing rule.
   - **Accumulation Criteria** - Used to define the accumulation criteria in a specific stop-loss pricing rule.
   - **Pricing Information** - Used to define stop-loss eligibility for claim line items.
   - **Characteristics** - Used to define the characteristics for the specific stop-loss pricing rule.

   The **Customer Information** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Bill Group Information	Displays the bill group information.	Not applicable
Policy Start Date	Displays the policy start date.	Not applicable
Policy End Date	Displays the policy end date.	Not applicable
Policy Status	Indicates the policy status for pricing rule. The valid values are: • In Force/Active • Post Runout • Runout	Not applicable

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Field Name	Field Description	Mandatory (Yes or No)
Pricing Rule Type	Indicates the pricing rule type.	Not applicable

The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Price Item	Indicates the price item.	Not applicable
Parent Customer's SSL Pricing Rules	Indicates the pricing date range derived from the parent customer's specific stop-loss pricing rule.	Not applicable
Pricing Start Date	Displays the pricing rule start date.	Not applicable
Pricing End Date	Displays the pricing rule end date.	Not applicable
Rate Option	Indicates the rate option of the specific stop-loss pricing rule for the price item.	Not applicable
Reinsurer Account	Used to indicate the account of the reinsurer person (associated with the parent customer of the bill group) which you want to use for defining the specific stop-loss pricing rule for the price item. **Note:** You cannot update the reinsurer account when the reinsurer billable charges are already created for the accumulation group. Ideally, you should first cancel the reinsurer charges and then update the reinsurer account in the specific stop-loss pricing rule.	No

4. Modify the accumulation criteria in a specific stop-loss pricing rule, if required.

Note: You can add, edit, or remove price item and its price item parameters in the accumulation criteria for a specific stop-loss, if required.

5. Modify the stop-loss eligibility for claim line items, if required.

Note: This section also consists of a button, **Reapply Claim Template**, on clicking the button a message occurs indicating that updating the claim template will reset all the default fields on the claim pricing rule.

6. Add, edit, or remove characteristics for a specific stop-loss pricing rule, if required.
7. Click **Save**.
   The changes made to a specific stop-loss pricing rule for a bill group are saved.

Related Topics

For more information on...	See...
Customer 360° Information - Pricing Information tab	Customer 360° Information - Pricing Information on page 641
Bill Group ASO Policy Pricing Rules zone	Bill Group Self-Funded Policy Pricing Rules on page 649
How to define accumulation criteria in a specific stop-loss pricing rule	Defining Accumulation Criteria in a Specific Stop-Loss Pricing Rule on page 3030

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For more information on...	See...
How to define claim pricing information in a specific stop loss pricing rule	Defining Claim Pricing Information in a Specific Stop Loss Pricing Rule on page 3032
How to define a characteristic for a specific stop-loss pricing rule	Defining a Characteristic for a Specific Stop-Loss Pricing Rule on page 3022

Viewing a Specific Stop-Loss Pricing Rule of a Bill Group

Procedure

To view a claim pricing rule of a bill group:

1. Search for the account, person, or policy whose pricing details you want to view in the **Customer 360° View** screen.
2. In the **Search Results** section, click the **View** (🔗) icon corresponding to the account, person, or policy whose pricing details you want to view.
   The **Account**, **Person**, or **Policy** tab in the **Customer 360° Information** screen appears.
3. Click the **Pricing** tab.
4. In the **Bill Group ASO Policy Information** zone, click the **Broadcast** (📡) icon corresponding to the bill group whose specific stop-loss pricing rule bill group details you want to view.
5. In the **Bill Group ASO Policy Pricing Rules** zone, click the link in the **Pricing Rule Information** column corresponding to the specific stop-loss pricing rule type whose specific stop-loss pricing rule bill group you want to view.
   The **Pricing Rule** screen appears. It contains the following zone:
   - **Specific Stop-Loss** - Displays the pricing rule specific stop-loss details for a bill group. It contains the following sections:
     - **Main** - Displays the basic details of the specific stop-loss pricing rule.
     - **Accumulation Criteria** - Displays the accumulation criteria in a specific stop-loss pricing rule.
     - **Pricing Information** - Displays the stop-loss eligibility for claim line items.
     - **Characteristics** - Displays the characteristics defined for the specific stop-loss pricing rule.
6. View the basic details of specific stop-loss pricing rule in the **Main** section.
7. View the accumulation criteria in the **Markup or Markdown Values** section.
8. View the stop-loss eligibility for claim line items in the **Line Items** section.
9. View the characteristics of the specific stop-loss pricing rule in the **Characteristics** section.

Related Topics

For more information on...	See...
Customer 360° Information - Pricing tab	Customer 360° Information - Pricing Information on page 641
Bill Group ASO Policy Pricing Rules zone	Bill Group Self-Funded Policy Pricing Rules on page 649
Pricing Rule screen	Pricing Rule (Used for Viewing) on page 689
Specific Stop-Loss zone	Specific Stop-Loss on page 698

Deleting a Specific Stop-Loss Pricing Rule of a Bill Group

Procedure

To delete a specific stop-loss pricing rule of a bill group:

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1. Search for the account, person, or policy whose pricing details you want to view in the **Customer 360° View** screen.
2. In the **Search Results** section, click the **View** (🔗) icon corresponding to the account, person, or policy *w*hose pricing details you want to view.
   The **Account**, **Person**, or **Policy** tab in the **Customer 360° Information** screen appears.
3. Click the **Pricing** tab, in the **Bill Group ASO Policy Pricing Rules** zone, click the **Delete** (🗑) icon in the **Delete** column corresponding to the specific stop-loss pricing rule type whose specific stop-loss pricing rule you want to delete.
   A message appears confirming whether you want to delete the specific stop-loss pricing rule.
4. Click **OK**.
   The specific stop-loss pricing rule is deleted.

Related Topics

For more information on...	See...
Customer 360° Information - Pricing tab	Customer 360° Information - Pricing Information on page 641
Bill Group ASO Policy Pricing Rules zone	Bill Group Self-Funded Policy Pricing Rules on page 649

Aggregate Stop-Loss (ASL) Pricing

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

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

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

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

- Algorithm which should be triggered while validating a transaction.

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

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

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

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

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

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

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

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

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

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

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

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

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    - Percentage of Enrollment Based Limit
- Whether the ASL limit should be set to either of the following during the settlement period:
    - Policy Based Limit
    - Enrollment Based or Minimum ASL Limit (Whichever is Greater)
    - Enrollment Based Limit

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

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

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

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

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

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

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

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

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

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

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

Defining a Aggregate Stop-Loss (ASL) Pricing Rule Type

Prerequisites

To define an aggregate stop-loss (SSL) pricing rule type, you should have:

- Business Object **C1-PricingRuleTypeASL** defined for pricing rule type.
- Business Object **C1-PricingRuleASL** defined for pricing rule.
- Pricing rule type category for aggregate stop-loss defined in the application

Procedure

To define an aggregate stop-loss pricing rule type:

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1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **P** and then click **Pricing Rule Type**.
   A sub-menu appears.
3. Click the **Add** option from the **Pricing Rule Type** sub-menu.

   The **Select Business Object** screen appears. It contains the following field:

Field Name	Field Description	Mandatory (Yes or No)
Pricing Rule Type Business Object	Used to indicate the business object using which you want to create the pricing rule type. **Note:** You can create an aggregate stop-loss pricing rule type using the **Aggregate Stop-Loss (ASL) Pricing Rule Type** business object.	Yes

Tip: Alternatively, you can access this screen by clicking the **Add** button in the **Page Title** area of the **Pricing Rule Type** screen.

4. Select the **Aggregate Stop-Loss (ASL) Pricing Rule Type** business object.
5. Click **OK**.

   The **Aggregate Stop-Loss (ASL) Pricing Rule Type** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details about the aggregate stop-loss pricing rule type.
   - **Related Pricing Rule Types** - Used to define the pricing rule types which are related to the parent pricing rule type.
   - **Transaction Field Mapping** - Used to specify the transaction related data mapped to the pricing rule type
   - **Algorithms** - Used to define the algorithms used for the pricing rule type.
   - **Additional Data** - Used to specify the additional information about the pricing rule type.
   - **Price Items** - Used to define the price items assigned to the pricing rule type.
   - **Price Item Parameters** - Used to define the price item parameters in the pricing rule type.
   - **Characteristics** - Used to define the characteristics for the pricing rule type.
   - **ASL-Specific Additional Data** - Used to specify the aggregate stop-loss related additional data.

   The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Pricing Rule Type	Used to specify the pricing rule type.	Yes
Description	Used to specify the description for the pricing rule type.	Yes
Detailed Description	Used to specify additional information about the pricing rule type.	No
Related Transaction Business Object	Used to indicate the pricing rule business object. The valid values are: • Claim Pricing Rule • Aggregate Stop-Loss (ASL) Pricing Rule • Specific Stop-Loss (SSL) Pricing Rule • Retention Type Claim Based Pricing Rule • Retention Type Enrollment Based Pricing Rule	Yes

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Field Name	Field Description	Mandatory (Yes or No)
Business Object	Indicate the pricing rule type business object for aggregate stop-loss.	Not applicable
Status	Used to indicate the status of the pricing rule type. The valid values are: • Active • Inactive	Yes
Primary	Used to select the checkbox if the pricing rule type is primary.	No
Pricing Rule Type Category	Used to indicate the pricing rule type category for the pricing rule type. The valid values are: • Claim • Aggregate Stop-Loss • Specific Stop-Loss • Retention Type Claim Based • Retention Type Enrollment Based	Yes

6. Enter the required details in the **Main** section.
7. Add the related pricing rule types in the primary pricing rule type, if required.

Note: Related Pricing Rule Types section appears when the pricing rule type is primary.

8. Define the transaction field mapping in the primary pricing rule type, if required.

Note: Transaction Field Mapping section appears when the pricing rule type is primary.

9. Associate algorithms with the pricing rule type, if required.
10. Define additional data for the pricing rule type, if required.
11. Add pricing items in the pricing rule type, if required.
12. Add price item parameters in the pricing rule type, if required.
13. Define characteristics for the pricing rule type, if required.
14. Add the ASL-Specific additional data in the pricing rule type, if required.
15. Click **Save**.
    The aggregate stop-loss pricing rule type is defined.

Related Topics

For more information on...	See...
Pricing Rule Type screen	Pricing Rule Type on page 2942
How to add the related pricing rule types in the primary pricing rule type	Adding Related Pricing Rule Types in a Primary Pricing Rule Type on page 2959
How to define the transaction field mapping in the primary pricing rule type	Defining Transaction Field Mapping in a Primary Pricing Rule Type on page 2961
How to associate algorithms with the pricing rule type	Associating Algorithms with a Pricing Rule Type on page 2967
How to define additional data for the pricing rule type	Defining Additional Data for a Pricing Rule Type on page 2969
How to add pricing items in the pricing rule type	Adding Price Items in a Pricing Rule Type on page 2971

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For more information on...	See...
How to add price item parameters in the pricing rule type	Adding a Price Item Parameter in a Pricing Rule Type on page 2973
How to define a characteristic for the pricing rule type	Defining a Characteristic for a Pricing Rule Type on page 2975
How to add the ASL-Specific data in the pricing rule type	Adding the ASL-Specific Data in a Pricing Rule Type on page 3044

Adding the ASL-Specific Data in a Pricing Rule Type

Procedure

To add the ASL-Specific additional data in a pricing rule type:

1. Ensure that the **ASL-Specific Additional Data** section is expanded when you are defining *or* editing a pricing rule type.

   The **ASL-Specific Additional Data** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
ASL Billable Charge Line Type	Used to specify the Aggregate Stop-Loss billable charge line type. **Note:** On clicking the **Search** (🔍) icon that appears corresponding to the **ASL Billable Charge Line Type** field, the **Billable Charge Line Type Search** window appears. On specifying the billable charge line type, the description of the billable charge line type appears corresponding to the **ASL Billable Charge Line Type** field.	No
Domestic Provider Claim Billable Charge Line Type	Used to specify the claim billable charge line type for domestic provider. **Note:** On clicking the **Search** (🔍) icon that appears corresponding to the **Domestic Provider Claim Billable Charge Line Type** field, the **Billable Charge Line Type Search** window appears. On specifying the billable charge line type, the description of the billable charge line type appears corresponding to the **Domestic Provider Claim Billable Charge Line Type** field.	No
Markup or Markdown Billable Charge Line Type	Used to specify the markup or markdown billable charge line type.	No

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Field Name	Field Description	Mandatory (Yes or No)
	Note: On clicking the **Search** (🔍) icon that appears corresponding to the **Markup or Markdown Billable Charge Line Type** field, the **Billable Charge Line Type Search** window appears. On specifying the billable charge line type, the description of the billable charge line type appears corresponding to the **Markup or Markdown Billable Charge Line Type** field.	
Rule Based Billing Eligibility Field	Used to specify whether the rule based field is eligible for billing or not. **Note:** On clicking the **Search** (🔍) icon that appears corresponding to the **Rule Based Billing Eligibility Field** field, the **Field Search** window appears. On specifying the field, the description of the field appears corresponding to the **Rule Based Billing Eligibility Field** field.	No
Rule Based Markup or Markdown Eligibility Field	Used to specify whether the rule based markup or markdown field is eligible for billing or not. **Note:** On clicking the **Search** (🔍) icon that appears corresponding to the **Rule Based Markup or Markdown Eligibility Field** field, the **Field Search** window appears. On specifying the field, the description of the field appears corresponding to the **Rule Based Markup or Markdown Eligibility Field** field.	No
Rule Based Domestic Provider Claim Eligibility Field	Used to specify the rule based domestic provider for claim eligibility field. **Note:** On clicking the **Search** (🔍) icon that appears corresponding to the **Rule Based Domestic Provider Claim Eligibility Field** field, the **Field Search** window appears. On specifying the field, the description of the field appears corresponding to the **Rule Based Domestic Provider Claim Eligibility Field** field.	No
ASL Limit Price Item	Used to specify the Aggregated Stop-Loss limit price item.	No

2. Enter the required details in the **ASL-Specific Additional Data** section.
3. Click **Save**.

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The ASL-Specific Additional data is added in the pricing rule type.

Related Topics

For more information on...	See...
How to define an aggregate stop-loss (ASL) pricing rule type	Defining a Aggregate Stop-Loss (ASL) Pricing Rule Type on page 3041
How to edit the aggregate stop-loss (ASL) pricing rule type	Editing an Aggregate Stop-Loss (ASL) Pricing Rule Type on page 3046

Editing an Aggregate Stop-Loss (ASL) Pricing Rule Type

Prerequisites

To edit the aggregate stop-loss (ASL) pricing rule type, you should have:

- Business Object **C1-PricingRuleASL** defined for pricing rule.
- Pricing rule type category for aggregate stop-loss (ASL) defined in the application

Procedure

To edit the aggregate stop-loss (ASL) pricing rule type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **P** and then click **Pricing Rule Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Pricing Rule Type** sub-menu.
   The **Pricing Rule Type** screen appears.
4. In the **Pricing Rule Type List** zone, click the **Edit** (✎) icon in the **Edit** column corresponding *t*o the pricing rule type for aggregate stop-loss (ASL) whose details you want to edit.

   The **Aggregate Stop-Loss (ASL) Pricing Rule Type** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details about the aggregate stop-loss pricing rule type.
   - **Related Pricing Rule Types** - Used to define the pricing rule types which are related to the parent pricing rule type.
   - **Transaction Field Mapping** - Used to specify the transaction related data mapped to the pricing rule type
   - **Algorithms** - Used to define the algorithms used for the pricing rule type.
   - **Additional Data** - Used to specify the additional information about the pricing rule type.
   - **Price Items** - Used to define the price items assigned to the pricing rule type.
   - **Price Item Parameters** - Used to define the price item parameters in the pricing rule type.
   - **Characteristics** - Used to define the characteristics for the pricing rule type.
   - **ASL-Specific Additional Data** - Used to specify the aggregate stop-loss additional data.

   The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Pricing Rule Type	Displays the pricing rule type.	Not applicable
Description	Used to specify the description for the pricing rule type.	Yes
Detailed Description	Used to specify additional information about the pricing rule type.	No

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Field Name	Field Description	Mandatory (Yes or No)
Related Transaction Business Object	Used to indicate the pricing rule business object. The valid values are: • Claim Pricing Rule • Aggregate Stop-Loss (ASL) Pricing Rule • Specific Stop-Loss (SSL) Pricing Rule • Retention Type Claim Based Pricing Rule • Retention Type Enrollment Based Pricing Rule	Yes
Business Object	Displays the pricing rule type business object for aggregate stop-loss.	Not applicable
Status	Used to indicate the status of the pricing rule type. The valid values are: • Active • Inactive	Yes
Primary	Used to select the checkbox if the pricing rule type is primary.	No
Pricing Rule Type Category	Used to indicate the pricing rule type category for the pricing rule type. The valid values are: • Claim • Aggregate Stop-Loss • Specific Stop-Loss • Retention Type Claim Based • Retention Type Enrollment Based	Yes

Tip: Alternatively, you can click the **Edit** button in the **Pricing Rule Type** zone to edit the pricing rule type for specific stop-loss.

5. Modify the details in the **Main** section, if required.
6. Add, edit, or remove the related pricing rule types in the primary pricing rule type, if required.
7. Modify the transaction field mapping in the primary pricing rule type, if required.
8. Add, edit, or remove algorithms with the pricing rule type, if required.
9. Modify the additional data for the pricing rule type, if required.
10. Add, edit, or remove pricing items in the pricing rule type, if required.
11. Add, edit, or remove price item parameters in the pricing rule type, if required.
12. Add, edit, or remove characteristics for the pricing rule type, if required.
13. Modify the ASL-Specific data in the pricing rule type, if required.
14. Click **Save**.
    The changes made to the aggregate stop-loss pricing rule type are saved.

Related Topics

For more information on...	See...
Pricing Rule Type screen	Pricing Rule Type on page 2942
Pricing Rule Type List zone	Pricing Rule Type List on page 2943
Pricing Rule Type zone	Pricing Rule Type on page 2946

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For more information on...	See...
How to add the related pricing rule types in the primary pricing rule type	Adding Related Pricing Rule Types in a Primary Pricing Rule Type on page 2959
How to define the transaction field mapping in the primary pricing rule type	Defining Transaction Field Mapping in a Primary Pricing Rule Type on page 2961
How to associate algorithms with the pricing rule type	Associating Algorithms with a Pricing Rule Type on page 2967
How to define additional data for the pricing rule type	Defining Additional Data for a Pricing Rule Type on page 2969
How to add pricing items in the pricing rule type	Adding Price Items in a Pricing Rule Type on page 2971
How to add price item parameters in the pricing rule type	Adding a Price Item Parameter in a Pricing Rule Type on page 2973
How to define a characteristic for the pricing rule type	Defining a Characteristic for a Pricing Rule Type on page 2975
How to add the ASL-Specific data in the pricing rule type	Adding the ASL-Specific Data in a Pricing Rule Type on page 3044

Deleting an Aggregate Stop-Loss (ASL) Pricing Rule Type

Procedure

To delete an aggregate stop-loss pricing rule type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **P** and then click **Pricing Rule Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Pricing Rule Type** sub-menu.
   The **Pricing Rule Type** screen appears.
4. In the **Pricing Rule Type List** zone, click the **Delete** ( ) icon in the **Delete** column corresponding to the aggregate stop-loss pricing rule type that you want to delete.
   A message appears confirming whether you want to delete the aggregate stop-loss pricing rule type.

   Note: You can delete an aggregate stop-loss pricing rule type when it is not yet used in the system.

   Tip: Alternatively, you can delete an aggregate stop-loss pricing rule type by clicking the **Delete** button in the **Pricing Rule Type** zone.
5. Click **OK**.
   The aggregate stop-loss pricing rule type is deleted.

Related Topics

For more information on...	See...
Pricing Rule Type screen	Pricing Rule Type on page 2942
Pricing Rule Type List zone	Pricing Rule Type List on page 2943
Pricing Rule Type zone	Pricing Rule Type on page 2946

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Viewing the Aggregate Stop-Loss (ASL) Pricing Rule Type Details

Procedure

To view the details of an aggregate stop-loss pricing rule type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **P** and then click **Pricing Rule Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Pricing Rule Type** sub-menu.
   The **Pricing Rule Type** screen appears.
4. In the **Pricing Rule Type List** zone, click the **Broadcast** (ᯤ) icon corresponding to *t*he aggregate stop-loss pricing rule type whose details you want to view.
   The **Pricing Rule Type** zone appears.
5. View the details of the aggregate stop-loss pricing rule type in the **Pricing Rule Type** zone.

Related Topics

For more information on...	See...
Pricing Rule Type screen	Pricing Rule Type on page 2942
Pricing Rule Type List zone	Pricing Rule Type List on page 2943
Pricing Rule Type zone	Pricing Rule Type on page 2946

Defining an Aggregate Stop-Loss Pricing Rule for a Parent Customer

Prerequisites

To define an aggregate stop-loss pricing rule for a parent customer, you should have:

- Business Object **C1-PricingRule** defined for pricing rule.
- Business Object **C1-PricingRuleASL** defined for aggregate stop-loss pricing rule.
- Pricing rule type defined in the application.
- Price item defined in the application.
- Rate option defined in the application.
- Settlement frequency defined in the application.
- Underwriter review defined in the application.
- Values defined for the **Reinsurer Person Relationship Type** option type in the **C1-ASOBLLNG** feature configuration.

Procedure

To define an aggregate stop-loss pricing rule for a parent customer:

1. Search for the account, person, or policy whose pricing details you want to view in the **Customer 360° View** screen.
2. In the **Search Results** section, click the **View** (🔗) icon corresponding to the account, person, *o*r policy whose pricing details you want to view.
   The **Account**, **Person**, or **Policy** tab in the **Customer 360° Information** screen appears.
3. Click the **Pricing Information** tab and then click the **Add** link in the upper right corner of the **Parent Customer Pricing Rules** zone.

   The **Pricing Rule** screen appears. It contains the following fields:

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Field Name	Field Description	Mandatory (Yes or No)
Person Name	Displays the person name.	Not applicable
Person Type	Displays the person type.	Not applicable
Pricing Rule Type	Used to indicate the pricing rule type to create the pricing rule. **Note:** You can create an aggregate stop-loss pricing rule using the **Pricing Rule Type** for aggregate stop-loss.	Yes

4. Click **OK**.

The **Aggregate Stop-Loss (ASL) Pricing Rule** screen appears. It contains the following sections:

- **Customer Information** - Displays the customer information.
- **Main** - Used to specify basic details about the aggregate stop-loss pricing rule.
- **Accumulation Parameters** - Used to define the accumulation parameters based on which you want to accumulate the aggregate stop-loss for the transactions which are processed in the run-in or active period of the policy.
- **Run-In Parameters** - Used to define run-in parameters in the run-in period of the policy.
- **Characteristics** - Used to define the characteristics for an aggregation stop-loss pricing rule.

The **Customer Information** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Parent Customer Information	Displays the parent customer information.	Not applicable
Pricing Rule Type	Indicates the pricing rule type.	Not applicable

The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Price Item	Used to indicate the price item which you want to define for pricing.	Yes
Parent Customer's SSL or ASL Pricing Rules	Used to indicate the pricing date range derived from the parent customer's specific stop-loss or aggregate stop-loss pricing rules. **Note:** This field is enabled when you select an option from the **Price Item** field.	Yes
Pricing Start Date	Displays the pricing rule start date. **Note:** By default it displays the **Policy Start Date**.	Not applicable
Pricing End Date	Displays the pricing rule end date.	Not applicable

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Field Name	Field Description	Mandatory (Yes or No)
	Note: This field displays date when you select the date range from **Parent Customer's SSL or ASL Pricing Rules**.	
Rate Option	Used to indicate the rate option which you want to use for defining the aggregate stop-loss pricing rule for the price item. **Note:** Options appears in this field when you select an option from the **Price Item** field.	Yes
Settlement Frequency	Used to indicate the settlement frequency which helps to determine the bill after date. The valid values are: • **Immediately** - The bill after date is not calculated. The aggregate stop-loss billable charge is billed immediately in the next cycle. • **Manually (At Required Intervals)** - The bill after date specified in the **Manual Settlement Date** parameter while executing the **C1-BCASL** batch is stamped on the aggregate stop-loss billable charge. • **Monthly** - The bill after date specified in the **Manual Settlement Date** parameter while executing the **C1-BCASL** batch is stamped on the aggregate stop-loss billable charge. • **Yearly** - The bill after date in the aggregate stop-loss billable charge is set to the pricing end date. **Note:** This field is enabled when you select an option from the **Price Item** field.	Yes
Underwriter Review	Used to indicate whether the underwriter settlement review flag is on or off. The valid values are: • Yes • No **Note:** This field is enabled when you select an option from the **Price Item** field.	Yes
Reinsurer Account	Used to indicate the account of the reinsurer person (associated with the parent customer) which you want to use for defining the aggregate stop-loss pricing rule for the price item.	No

5. Enter the required details in the **Main** section.
6. Define accumulation parameters in an aggregate stop-loss pricing rule, if required.

Note: The **Accumulation Parameters** section appears when an option from the **Price Item** field is selected.

7. Define run-in parameters in an aggregate stop-loss pricing rule, if required.

Note: The **Run-In Parameters** section appears when an option from the **Price Item** field is selected.

8. Define characteristics for an aggregate stop-loss pricing rule, if required.

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9. Click **Save**.
   The aggregate stop-loss pricing rule for a parent customer is defined.

Related Topics

For more information on...	See...
Customer 360° Information - Pricing Information tab	Customer 360° Information - Pricing Information on page 641
Parent Customer Pricing Rules zone	Parent Customer Pricing Rules on page 643
How to define accumulation parameters in an aggregate stop-loss pricing rule	Defining Accumulation Parameters in an Aggregate Stop-Loss Pricing Rule on page 3052
How to define run-in parameters in an aggregate stop-loss pricing rule	Defining Run-in Parameters in an Aggregate Stop-Loss Pricing Rule on page 3055
How to define a characteristic for an aggregate stop-loss pricing rule	Defining a Characteristic for an Aggregate Stop-Loss Pricing Rule on page 3056

Defining Accumulation Parameters in an Aggregate Stop-Loss Pricing Rule

Procedure

To define accumulation parameters in an aggregate stop-loss pricing rule:

1. Ensure that the **Accumulation Parameters** section is expanded when you have selected an option from the **Price Item** field of **Main** section while defining an aggregation stop-loss pricing rule.

   The **Accumulation Parameters** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Accumulation Group ID	Displays blank field, accumulation group ID is generated when accumulation parameter values are defined for an aggregation stop-loss.	Not applicable
ASL Credit Account	Used to indicate the account in which the aggregate stop-loss amount should be credited. **Note:** This field becomes read when you select a date range from the **Parent Customer's SSL or ASL Pricing Rules**.	Not applicable
Incurred Start Date	Displays the incurred start date based on which you want to accumulate the aggregate stop-loss.	Not applicable

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The accumulated aggregated stop-loss for claim transactions are processed in the run-in or active period of the policy. This field displays date when you select a date range from the **Parent Customer's SSL or ASL Pricing Rules**. **Incurred Start Date** is equal to the pricing rule start date.	
Incurred End Date	Displays the incurred end date based on which you want to accumulate the aggregate stop-loss. **Note:** The accumulated aggregated stop-loss for claim transactions are processed in the run-in or active period of the policy. This field displays date when you select a date range from the **Parent Customer's SSL or ASL Pricing Rules**. **Incurred End Date** is equal to the pricing rule end date.	Not applicable
ASL Payout Limit	Used to specify the maximum limit defined for aggregated stop-loss at the member or main subscriber level.	Yes
Paid Start Date	Used to specify the paid start date based on which you want to accumulate the aggregate stop-loss. **Note:** The accumulated specific stop-loss for claim transactions are processed in the run-in or active period of the policy. This field displays date when you select a date range from the **Parent Customer's SSL or ASL Pricing Rules**. **Paid Start Date** is equal to the pricing rule start date.	Yes
Paid End Date	Used to specify the paid end date based on which you want to accumulate the aggregate stop-loss.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The accumulated specific stop-loss for claim transactions are processed in the run-in or active period of the policy. This field displays date when you select a date range from the **Parent Customer's SSL or ASL Pricing Rules**. **Paid End Date** is equal to the pricing rule end date.	
Settlement Days	Used to indicate the settlement days which helps to calculate the settlement date. **Note:** Settlement date is calculated as the pricing end date, incurred end date, or paid end date whichever is later added with the settlement days.	Yes
ASL Limit (During Policy Period)	Used to indicate the aggregate stop-loss limit set during the policy period. The valid values are: • Policy Based Limit • Enrollment Based Limit • Percentage of Enrollment Based Limit • Enrollment Based or Minimum ASL Limit (Whichever is Greater)	Yes
ASL Limit (During Settlement Period)	Used to indicate the aggregate stop-loss limit set during the settlement period. The valid values are: • Policy Based Limit • Enrollment Based Limit • Enrollment Based or Minimum ASL Limit (Whichever is Greater)	Yes
Minimum ASL Limit	Used to specify the minimum ASL limit. **Note:** This field is enabled when you select the **Enrollment Based or Minimum ASL Limit (Whichever is Greater)** option from the **ASL Limit (During Policy Period)** or **ASL Limit (During Settlement Period)** field.	Yes (Conditional) **Note:** This field is required when the **ASL Limit (During Policy Period)** or **ASL Limit (During Settlement Period)** is **Enrollment Based or Minimum ASL Limit (Whichever is Greater)**.
Percentage of Enrollment Based Limit	Used to specify the percentage of enrollment based limit. **Note:** This field is enabled when you select the **Percentage of Enrollment Based Limit** option from **ASL Limit (During Policy Period)** field.	Yes (Conditional) **Note:** This field is required when the **ASL Limit (During Policy Period)** is **Percentage of Enrollment Based Limit**.

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Field Name	Field Description	Mandatory (Yes or No)
Policy Based Limit	Used to specify the policy based limit.	Yes (Conditional)
	Note: This field is enabled when you select the **Policy Based Limit** option from the **ASL Limit (During Policy Period)** or **ASL Limit (During Settlement Period)** field.	**Note:** This field is required when the **ASL Limit (During Policy Period)** or **ASL Limit (During Settlement Period)** is **Policy Based Limit**.

2. Enter the required details in the **Accumulation Parameters** section.
3. Click **Save**.
   The accumulation parameters are defined in the aggregated stop-loss pricing rule.

Related Topics

For more information on...	See...
How to define an aggregated stop-loss pricing rule for a parent customer	Defining an Aggregate Stop-Loss Pricing Rule for a Parent Customer on page 3049
How to edit an aggregated stop-loss pricing rule of a parent customer	Editing an Aggregate Stop-Loss Pricing Rule of a Bill Group on page 3069

Defining Run-in Parameters in an Aggregate Stop-Loss Pricing Rule

Prerequisites

To define run-in parameters in an aggregate stop-loss pricing rule, you should have:

- Settlement days defined in the application.
- ASL limit during the policy period defined in the application.
- ASL limit during the settlement period defined in the application.

Procedure

To define run-in parameters in an aggregate stop-loss pricing rule:

1. Ensure that the **Run-In Parameters** section is expanded when you have selected an option from the **Price Item** field of **Main** section while defining an aggregate stop-loss pricing rule.

   The **Run-In Parameters** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Run-In	Used to specify whether the run-in parameters of the run-in period of policy are to be considered or not in an aggregate stop-loss pricing	No
Accumulation Group ID	Displays blank column, accumulation group ID is generated when accumulation parameter values are defined for an aggregate stop-loss.	Not applicable
Incurred Start Date	Used to specify the incurred start date based on the run-in period of the policy in the aggregate stop-loss.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	Note: This field is enabled when you select the checkbox for the **Run-In** field.	
Incurred End Date	Used to specify the incurred end date based on the run-in period of the policy in the aggregate stop-loss. **Note:** This field is enabled when you select the checkbox for the **Run-In** field.	Yes
Paid Start Date	Used to specify the paid start date based on the run-in period of the policy in the aggregate stop-loss. **Note:** This field is enabled when you select the checkbox for the **Run-In** field.	Yes
Paid End Date	Used to specify the paid end date based on the run-in period of the policy in the aggregate stop-loss. **Note:** This field is enabled when you select the checkbox for the **Run-In** field.	Yes
Run-In Maximum Limit	Used to specify the maximum limit of the run-in parameters. **Note:** This field is enabled when you select the checkbox for the **Run-In** field.	Yes

2. Enter the required details in the **Run-In Parameters** section.
3. Click **Save**.
   The run-in parameters are defined in the aggregate stop-loss pricing rule.

Related Topics

For more information on...	See...
How to define an aggregate stop-loss pricing rule for a parent customer	Defining an Aggregate Stop-Loss Pricing Rule for a Parent Customer on page 3049
How to edit an aggregate stop-loss pricing rule of a parent customer	Editing an Aggregate Stop-Loss Pricing Rule of a Parent Customer on page 3057

Defining a Characteristic for an Aggregate Stop-Loss Pricing Rule

Prerequisites

To define a characteristic for an aggregate stop-loss pricing rule, you should have:

- Characteristic types defined in the application (where the characteristic entity is set to **Pricing Rule**)

Procedure

To define a characteristic for an aggregate stop-loss pricing rule:

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1. Ensure that the **Characteristics** section is expanded when you are defining or editing a pricing rule.

   The **Characteristics** section contains the following columns in a grid:

Column Name	Column Description	Mandatory (Yes or No)
Effective Date	Used to specify the date from when the characteristic is effective for the aggregate stop-loss pricing rule.	Yes (Conditional) **Note:** This field is required when you are defining a characteristic for the aggregate stop-loss pricing rule.
Characteristic Type	Used to indicate the characteristic type. **Note:** The list includes only those characteristic types where the characteristic entity is set to **Pricing Rule**.	Yes (Conditional) **Note:** This field is required when you are defining a characteristic for the aggregate stop-loss pricing rule.
Characteristic Value	Used to specify the value for the characteristic type. **Note:** If you select a predefined characteristic type, the **Search** (🔍) icon appears corresponding to the **Characteristic Value** field. On clicking the **Search** icon, the **Predefined Characteristic Search** window appears. On specifying the value for a predefined characteristic type, the description of the characteristic value appears corresponding to the **Characteristic Value** field.	Yes (Conditional) **Note:** This field is required when you are defining a characteristic for the aggregate stop-loss pricing rule.

2. Enter the required details in the **Characteristics** section.
3. If you want to define more than one characteristic for the aggregate stop-loss pricing rule, click the **Add** (+) icon and then repeat step 2.

   Note: However, if you want to remove a characteristic from the aggregate stop-loss pricing rule, click the **Delete** (🗑) icon corresponding to the characteristic.

4. Click **Save**.
   The characteristics are defined for the aggregate stop-loss pricing rule.

Related Topics

For more information on...	See...
How to define an aggregate stop-loss pricing rule for a parent customer	Defining an Aggregate Stop-Loss Pricing Rule for a Parent Customer on page 3049
How to edit the aggregate stop-loss pricing rule for a parent customer	Editing an Aggregate Stop-Loss Pricing Rule of a Parent Customer on page 3057

Editing an Aggregate Stop-Loss Pricing Rule of a Parent Customer

Prerequisites

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To edit an aggregate stop-loss pricing rule of a parent customer, you should have:

- Business Object **C1-PricingRuleASL** defined for aggregate stop-loss pricing rule.
- SSL accumulation level defined in the application.
- Underwriter review defined in the application.
- Values defined for the **Reinsurer Person Relationship Type** option type in the **C1-ASOBLLNG** feature configuration.

Procedure

To edit an aggregate stop-loss pricing rule of a parent customer:

1. Search for the account, person, or policy whose pricing details you want to view in the **Customer 360° View** screen.
2. In the **Search Results** section, click the **View** (🔗) icon corresponding to the account, person, or policy *w*hose pricing details you want to view.
   The **Account**, **Person**, or **Policy** tab in the **Customer 360° Information** screen appears.
3. Click the **Pricing** tab, in the **Parent Customer Pricing Rules** zone click the **Edit** (✎) icon in the **Edit** column corresponding to the pricing rule type for aggregate stop-loss whose aggregate stop-loss pricing rule details you want to edit.

   The **Aggregate Stop-Loss (ASL) Pricing Rule** screen appears. It contains the following sections:

   - **Customer Information** - Displays the customer information.
   - **Main** - Used to specify basic details about the aggregate stop-loss pricing rule.
   - **Accumulation Parameters** - Used to define the accumulation parameters based on which you want to accumulate the aggregate stop-loss for the transactions which are processed in the run-in or active period of the policy.
   - **Run-In Parameters** - Used to define run-in parameters in the run-in period of the policy.
   - **Characteristics** - Used to define the characteristics for an aggregate stop-loss pricing rule.

   The **Customer Information** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Parent Customer Information	Displays the parent customer information	Not applicable
Pricing Rule Type	Indicates the pricing rule type.	Not applicable

   The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Price Item	Indicates the price item defined for pricing.	Not applicable
Parent Customer's SSL or ASL Pricing Rules	Indicates the pricing date range derived from the parent customer's specific stop-loss or aggregate stop-loss pricing rules.	Not applicable
Pricing Start Date	Displays the pricing rule start date.	Not applicable
Pricing End Date	Displays the pricing rule end date.	Not applicable
Rate Option	Indicates the rate option used for defining the aggregate stop-loss pricing rule for the price item.	Not applicable
Settlement Frequency	Indicates the settlement frequency to determine the bill after date. The valid values are: • **Immediately** - The bill after date is not calculated. The aggregate stop-loss billable charge is billed immediately in the next cycle.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	• **Manually (At Required Intervals)** - The bill after date specified in the **Manual Settlement Bill After Date** parameter while executing the **C1-BCASL** batch is stamped on the aggregate stop-loss billable charge. • **Monthly** - The bill after date specified in the **Manual Settlement Date** parameter while executing the **C1-BCASL** batch is stamped on the aggregate stop-loss billable charge. • **Yearly** - The bill after date in the aggregate stop-loss billable charge is set to the pricing end date.	
Underwriter Review	Used to indicate whether the underwriter settlement review flag is on or off. The valid values are: • Yes • No	Yes
Reinsurer Account	Used to indicate the account of the reinsurer person (associated with the parent customer) which you want to use for defining the aggregate stop-loss pricing rule for the price item. **Note:** You cannot update the reinsurer account when the reinsurer billable charges are already created for the accumulation group. Ideally, you should first cancel the reinsurer charges and then update the reinsurer account in the aggregate stop-loss pricing rule.	No

4. Modify the details in the **Main** section, if required.
5. Modify the accumulation parameters in an aggregate stop-loss pricing rule, if required.
6. Modify the run-in parameters in an aggregate stop-loss pricing rule, if required.
7. Add, edit, or remove characteristics for the aggregate stop-loss pricing rule, if required.
8. Click **Save**.
   The changes made to an aggregate stop-loss pricing rule for a parent customer are saved.

Related Topics

For more information on...	See...
Customer 360° Information - Pricing Information tab	Customer 360° Information - Pricing Information on page 641
Parent Customer Pricing Rules zone	Parent Customer Pricing Rules on page 643
How to define accumulation parameters in an aggregate stop-loss pricing rule	Defining Accumulation Parameters in an Aggregate Stop-Loss Pricing Rule on page 3052
How to define run-in parameters in an aggregate stop-loss pricing rule	Defining Run-in Parameters in an Aggregate Stop-Loss Pricing Rule on page 3055
How to define a characteristic for an aggregate stop-loss pricing rule	Defining a Characteristic for an Aggregate Stop-Loss Pricing Rule on page 3056

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Viewing an Aggregate Stop-Loss Pricing Rule of a Parent Customer

Procedure

To view an aggregate stop-loss pricing rule of a parent customer:

1. Search for the account, person, or policy whose pricing details you want to view in the **Customer 360° View** screen.
2. In the **Search Results** section, click the **View** (🔗) icon corresponding to the account, person, or policy whose pricing details you want to view.
   The **Account**, **Person**, or **Policy** tab in the **Customer 360° Information** screen appears.
3. Click the **Pricing** tab.
4. In the **Parent Customer Pricing Rules** zone, click the link in the **Pricing Rule Information** column corresponding to the aggregate stop-loss pricing rule type whose aggregate stop-loss pricing rule parent customer details you want to view.
   The **Pricing Rule** screen appears. It contains the following zone:
   - **Aggregate Stop-Loss** - Displays the pricing rule aggregate stop-loss details for a parent customer. It contains the following sections:
     - **Main** - Displays the basic details of the aggregate stop-loss pricing rule.
     - **Accumulation Parameters** - Displays the accumulation parameters based on which accumulated aggregate stop-loss for the transactions are processed in the run-in or active period of the policy.
     - **Run-In Parameters** - Displays the run-in parameters in the run-in period of the policy.
     - **Characteristics** - Displays the characteristics defined for the aggregate stop-loss pricing rule.
5. View the basic details of aggregate stop-loss pricing rule in the **Main** zone.
6. View the accumulated parameters in the **Accumulation Parameters** zone.
7. View the run-in parameters in the **Run-In Parameters** zone.
8. View the characteristics of the aggregate stop-loss pricing rule in the **Characteristics** zone.

Related Topics

For more information on...	**See...**
Customer 360° Information - Pricing tab	Customer 360° Information - Pricing Information on page 641
Parent Customer Pricing Rules zone	Parent Customer Pricing Rules on page 643
Pricing Rule screen	Pricing Rule (Used for Viewing) on page 689
Aggregate Stop-Loss zone	Aggregate Stop-Loss on page 693

Deleting an Aggregate Stop-Loss Pricing Rule of a Parent Customer

Procedure

To delete an aggregate stop-loss pricing rule of a parent customer:

1. Search for the account, person, or policy whose pricing details you want to view in the **Customer 360° View** screen.
2. In the **Search Results** section, click the **View** (🔗) icon corresponding to the account, person, *or* policy whose pricing details you want to view.
   The **Account**, **Person**, or **Policy** tab in the **Customer 360° Information** screen appears.
3. Click the **Pricing** tab, in the **Parent Customer Pricing Rules** zone, click the **Delete** (🗑) icon in the **Delete** column corresponding to the aggregate stop-loss pricing rule type whose aggregate stop-loss pricing rule you want to delete.
   A message appears confirming whether you want to delete the aggregate stop-loss pricing rule.
4. Click **OK**.

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The aggregate stop-loss pricing rule is deleted.

Related Topics

For more information on...	See...
Customer 360° Information - Pricing tab	Customer 360° Information - Pricing Information on page 641
Parent Customer Pricing Rules zone	Parent Customer Pricing Rules on page 643

Defining an Aggregate Stop-Loss Pricing Rule for a Bill Group

Prerequisites

To define an aggregate stop-loss pricing rule for a bill group, you should have:

- Business Object **C1-PricingRule** defined for pricing rule.
- Business Object **C1-PricingRuleASL** defined for aggregate stop-loss pricing rule.
- Pricing rule type defined in the application.
- Policy status defined in the application.
- Price item defined in the application.
- Rate option defined in the application.

Procedure

To define an aggregate stop-loss pricing rule for a bill group:

1. Search for the account, person, or policy whose pricing details you want to view in the **Customer 360° View** screen.
2. In the **Search Results** section, click the **View** (🔗) icon corresponding to the account, person, or policy *w*hose pricing details you want to view.
   The **Account**, **Person**, or **Policy** tab in the **Customer 360° Information** screen appears.
3. Click the **Pricing** tab and then click the **Add** link in the upper right corner of the **Bill Group ASO Policy Pricing Rules** zone.

   The **Pricing Rule** screen appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Person Name	Displays the person name.	Not applicable
Person Type	Displays the person type.	Not applicable
Pricing Rule Type	Used to indicate the pricing rule type to create the pricing rule. **Note:** You can create an aggregate stop-loss pricing rule using the **Pricing Rule Type** for aggregate stop-loss.	Yes
Pricing Group	Used to indicate the pricing group.	No
Policy Status	Used to indicate the policy status for pricing rule. The valid values are: • In Force/Active • Post Runout • Runout	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	Note: Aggregate stop-loss pricing rule cannot be created for **Runout** or **Post Runout** policy status where the policy run out end date is missing.	

4. Click **OK**.

The **Aggregate Stop-Loss (ASL) Pricing Rule** screen appears. It contains the following sections:

- **Customer Information** - Displays the customer information for bill group.
- **Main** - Used to specify basic details about the aggregate stop-loss pricing rule.
- **Accumulation Criteria** - Used to define the accumulation criteria in an aggregate stop-loss pricing rule.
- **Pricing Information** - Used to define stop-loss eligibility for claim line items.
- **Characteristics** - Used to define the characteristics for the aggregate stop-loss pricing rule.

The **Customer Information** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Bill Group Information	Displays the bill group information.	Not applicable
Policy Start Date	Displays the policy start date.	Not applicable
Policy End Date	Displays the policy end date.	Not applicable
Policy Status	Indicates the policy status for pricing rule. The valid values are: • In Force/Active • Post Runout • Runout	Not applicable
Pricing Rule Type	Indicates the pricing rule type.	Not applicable

The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Price Item	Used to indicate the price item. **Note:** Once an option is selected for this field, the field appears disabled.	Yes
Parent Customer's SSL or ASL Pricing Rules	Used to indicate the pricing date range derived from the parent customer's specific stop-loss or aggregate stop-loss pricing rule. **Note:** This field is enabled for selection when an option from **Price Item** field is selected.	Yes
Pricing Start Date	Displays the pricing rule start date. **Note:** This field displays the **Policy Start Date**.	Not applicable
Pricing End Date	Displays the pricing rule end date. **Note:** This field displays the **Policy End Date**.	Not applicable

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Field Name	Field Description	Mandatory (Yes or No)
Rate Option	Used to indicate the rate option to define the aggregate stop-loss pricing rule for the price item. **Note:** Rate options in this field appears for selection, when you select an option from the **Price Item** field.	Yes

5. Enter the required details in the **Main** section.
6. Define accumulation criteria in an aggregate stop-loss pricing rule, if required.

> **Note:**
>
> The **Accumulation Criteria** section appears when an option from **Parent Customer's SSL or ASL Pricing Rules** field is selected.
>
> You can also define the **Accumulation Criteria** for each rule in an aggregate stop-loss pricing rule.

7. Define stop-loss eligibility for claim line items, if required.

> **Note:**
>
> The **Pricing Information** section appears when an option from **Parent Customer's SSL or ASL Pricing Rules** field is selected.
>
> You can also define the **Pricing Information** for each rule in an aggregate stop-loss pricing rule.

8. Define characteristics for an aggregate stop-loss pricing rule, if required.
9. Click **Save**.
   The aggregate stop-loss pricing rule for a bill group is defined.

> **Note:** A price list and price assignment is created, the price list created is assigned to the aggregate stop-loss pricing rule.

Related Topics

For more information on...	See...
Customer 360° Information - Pricing tab	Customer 360° Information - Pricing Information on page 641
Bill Group ASO Policy Pricing Rules zone	Bill Group Self-Funded Policy Pricing Rules on page 649
How to define accumulation criteria in an aggregate stop-loss pricing rule	Defining Accumulation Criteria in an Aggregate Stop-Loss Pricing Rule on page 3063
How to define stop-loss eligibility for claim line items	Defining Claim Pricing Rules in an Aggregate Stop-Loss Pricing Rule on page 3065
How to define a characteristic for an aggregate stop-loss pricing rule	Defining a Characteristic for an Aggregate Stop-Loss Pricing Rule on page 3056

Defining Accumulation Criteria in an Aggregate Stop-Loss Pricing Rule

Procedure

To define accumulation criteria in an aggregate stop-loss pricing rule:

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1. Ensure that the **Accumulation Criteria** section is expanded when *y*ou have selected an option from the **Parent Customer's SSL or ASL Pricing Rules** field of **Main** section while defining or editing an aggregate stop-loss pricing rule.

   The **Accumulation Criteria** section contains the following fields:

<table>
<tr><th>Field Name</th><th>Field Description</th><th>Mandatory (Yes or No)</th></tr>
<tr><td>Accumulation Group ID</td><td>Displays blank field, accumulation group ID is generated when accumulation criteria values are defined for an aggregate stop-loss.</td><td>Not applicable</td></tr>
<tr><td>Price Item</td><td>Used to specify the price item information.

Note: On clicking the Search (🔍) icon that appears corresponding to the Price Item field, the Price Item Search window appears.</td><td>No</td></tr>
<tr><td>Price Item Parameters</td><td>This field contains the following columns:
<table>
<tr><th>Column Name</th><th>Column Description</th><th>Mandatory (Yes or No)</th></tr>
<tr><td>Price Item Parameter</td><td>Used to specify multiple parameters based on which you want to determine the price item utilization.

Note: On clicking the Search (🔍) icon that appears corresponding to the Price Item Parameter field, the Price Item Parameter Search window appears.</td><td>No</td></tr>
<tr><td>Parameter Value</td><td>Used to specify the value of the parameter.

Note:
On selecting the Price Item Parameter, the Search (🔍) icon appears corresponding to this field, and on clicking the icon, the Parameter Value Search window appears.</td><td>No</td></tr>
</table></td><td>No</td></tr>
</table>

2. Enter the required details in the **Accumulation Criteria** section.
3. If you want to define more than one price item in the accumulation group, click the **Add** (+) icon and then repeat step 2.

> **Note:** However, if you want to remove a price item from the accumulation group, click the **Delete** (🗑) icon corresponding to the price item.

4. If you want to define more than one price item parameters for the price item, click the **Add** (+) icon and then repeat step 2.

> **Note:** However, if you want to remove a price item parameter from the price item, click the **Delete** (🗑) icon corresponding to the price item parameter.

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5. Click **Save**.
   The accumulation criteria is defined in the aggregate stop-loss pricing rule.
6. You can define accumulation rules for each rule in an aggregate stop-loss pricing rule.

> **Note:** You can exclude a rule from the aggregate stop-loss pricing by selecting the **Exclude Rule** checkbox.

Related Topics

For more information on...	See...
How to define an aggregate stop-loss pricing rule for a bill group	Defining an Aggregate Stop-Loss Pricing Rule for a Bill Group on page 3061
How to edit an aggregate stop-loss pricing rule of a bill group	Editing an Aggregate Stop-Loss Pricing Rule of a Bill Group on page 3069

Defining Claim Pricing Rules in an Aggregate Stop-Loss Pricing Rule

Procedure

To define claim pricing rules in an aggregate stop-loss pricing rule:

1. Ensure that the **Pricing Information** section is expanded when you have selected an option from the **Parent Customer's SSL or ASL Pricing Rules** field of **Main** section while defining or editing an aggregate stop-loss pricing rule.

   The **Pricing Information** section contains the following section:

   - **Claim Pricing Rule** - Used to indicate the claim pricing rule. It contains the following sub-sections:
     - **Domestic Provider Claims** - Used to specify the domestic provider claim while calculating aggregate stop-loss.
     - **Markup or Markdown Values** - Used to define the markup or markdown values for billable charge line.
     - **Line Items** - Used to associate line items eligible for billing.

   The **Claim Pricing Rule** section contains the following field:

Field Name	Field Description	Mandatory (Yes or No)
Effective Claim Pricing Rule	Used to indicate the claim pricing rule effective for pricing.	No

   On clicking the **Reapply Claim Template** button to the right side of the **Effective Claim Pricing Rule** field you can reapply for claim pricing rule.

> **Note:** The **Reapply Claim Template** button appears when you are editing an aggregate stop-loss.

   The **Domestic Provider Claims** section contains the following field:

Field Name	Field Description	Mandatory (Yes or No)
Exclude ASL (Percentage)	Used to specify the domestic provider claim billable charge line excluding the aggregate stop-loss in percentage to create domestic provider claim calculation lines.	No

   The **Markup or Markdown Values** section contains the following fields:

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Field Name	Field Description	Mandatory (Yes or No)
Pricing Strategy	Indicates the pricing strategy. The valid values are: • Markdown • Markup • None	Not applicable
Markup or Markdown Type	Indicates the markup or markdown value type for claim line items. The valid values are: • Flat Amount • Percentage	Not applicable
Markup or Markdown Amount	Displays the markup or markdown amount. **Note:** This field displays amount when **Markup or Markdown Type** field is **Flat Amount**.	Not applicable

The **Line Items** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Sequence	Displays the sequence number for the line items.	Not applicable
Line Item	Displays the billing line items.	Not applicable
Eligible for Specific Stop-Loss	Used to specify whether the line item is eligible or not eligible for aggregate stop-loss.	No
Markup or Markdown Percentage Eligibility	Displays whether the line item is eligible or not eligible for markup or markdown percentage. The valid values are: • Eligible • Not Eligible	Not applicable
Markup or Markdown Percentage	Displays the percentage for markup or markdown value.	Not applicable

2. Select the required details in the **Claim Pricing Rule** section, if required.
3. Enter the required details in the **Domestic Provider Claims** section, if required.
4. Select the required details in the **Line Items** section, if required.
5. Click **Save**.
   The claim line items are defined in the aggregate stop-loss pricing rule.
6. You can define eligibility claim line items for each rule in an aggregate stop-loss pricing rule.

Note: You can exclude a rule from the aggregate stop-loss pricing by selecting the **Exclude Rule** checkbox.

Related Topics

For more information on...	See...
How to define an aggregate stop-loss pricing rule for a bill group	Defining an Aggregate Stop-Loss Pricing Rule for a Bill Group on page 3061

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For more information on...	See...
How to edit an aggregate stop-loss pricing rule of a bill group	Editing an Aggregate Stop-Loss Pricing Rule of a Bill Group on page 3069

Defining an Aggregate Stop-Loss Pricing Rule for a Bill Group Using a Pricing Group

Prerequisites

To define an aggregate stop-loss pricing rule for a bill group using a pricing group, you should have:

- Business Object **C1-PricingRule** defined for pricing rule.
- Business Object **C1-PricingRuleASL** defined for aggregate stop-loss pricing rule.
- Pricing rule type defined in the application.
- Pricing group defined in the application.
- Policy status defined in the application.
- Price item defined in the application.
- Rate option defined in the application.

Procedure

To define an aggregate stop-loss pricing rule for a bill group using a pricing group:

1. Search for the account, person, or policy whose pricing details you want to view in the **Customer 360° View** screen.
2. In the **Search Results** section, click the **View** (🔗) icon corresponding to the account, person, *or* policy whose pricing details you want to view.
   The **Account**, **Person**, or **Policy** tab in the **Customer 360° Information** screen appears.
3. Click the **Pricing** tab and then click the **Add** link in the upper right corner of the **Bill Group ASO Policy Pricing Rules** zone.

   The **Pricing Rule** screen appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Person Name	Displays the person name.	Not applicable
Person Type	Displays the person type.	Not applicable
Pricing Rule Type	Used to indicate the pricing rule type to create the pricing rule. **Note:** You can create an aggregate stop-loss pricing rule using the **Pricing Rule Type** for aggregate stop-loss.	Yes
Pricing Group	Used to indicate the pricing group.	Yes
Policy Status	Used to indicate the policy status for pricing rule. The valid values are: • In Force/Active • Post Runout • Runout	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	Note: Aggregate stop-loss pricing rule cannot be created for **Runout** or **Post Runout** policy status where the policy run out End Date is missing.	

4. Click **OK**.

The **Aggregate Stop-Loss (ASL) Pricing Rule** screen appears. It contains the following sections:

- **Customer Information** - Displays the customer information for bill group using pricing group.
- **Main** - Used to specify basic details about the claim pricing rule.
- **Markup or Markdown Values** - Used to define the markup or markdown values for billable charge line for each rule.
- **Line Items** - Used to associate line items eligible for billing for each rule.
- **Characteristics** - Used to define the characteristics for the claim pricing rule.

The **Customer Information** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Bill Group Information	Displays the bill group information.	Not applicable
Policy Start Date	Displays the policy start date.	Not applicable
Policy End Date	Displays the policy end date.	Not applicable
Policy Status	Indicates the policy status for pricing rule. The valid values are: • In Force/Active • Post Runout • Runout	Not applicable
Pricing Group	Displays the pricing group.	Not applicable
Pricing Rule Type	Indicates the pricing rule type.	Not applicable

The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Price Item	Used to indicate the price item. **Note:** Once an option is selected for this field, the field appears disabled.	Yes
Parent Customer's SSL or ASL Pricing Rules	Used to indicate the pricing date range derived from the parent customer's specific stop-loss or aggregate stop-loss pricing rule. **Note:** This field is enabled for selection when an option from **Price Item** field is selected.	Yes
Pricing Start Date	Displays the pricing rule start date.	Yes
Pricing End Date	Displays the pricing rule end date.	Yes
Rate Option	Used to indicate the rate option to define the aggregate stop-loss pricing rule for the price item.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	Note: Rate options in this field appears for selection, when you select an option from the **Price Item** field.	

5. Enter the required details in the **Main** section.
6. Define accumulation criteria for each rule in an aggregate stop-loss pricing rule pricing rule, if required.

Note: The **Accumulation Criteria** section appears in the rule section and the rule section appears when an option from **Parent Customer's SSL or ASL Pricing Rules** field is selected.

7. Define stop-loss eligibility for claim line items, if required.

Note: The **Pricing Information** section appears in the rule section and the rule section appears when an option from **Parent Customer's SSL or ASL Pricing Rules** field is selected.

8. Define characteristics for an aggregate stop-loss pricing rule, if required.
9. Click **Save**.
   The aggregate stop-loss pricing rule for a bill group using a pricing group is defined.

Note: A price list and price assignment is created, the price list created is assigned to the aggregate stop-loss pricing rule.

Related Topics

For more information on...	See...
Customer 360° Information - Pricing tab	Customer 360° Information - Pricing Information on page 641
Bill Group ASO Policy Pricing Rules zone	Bill Group Self-Funded Policy Pricing Rules on page 649
How to define Accumulation Criteria in an aggregate stop-loss pricing rule	Defining Accumulation Criteria in an Aggregate Stop-Loss Pricing Rule on page 3063
How to define stop-loss eligibility for claim line items	Defining Claim Pricing Rules in an Aggregate Stop-Loss Pricing Rule on page 3065
How to define a characteristic for an aggregate stop-loss pricing rule	Defining a Characteristic for an Aggregate Stop-Loss Pricing Rule on page 3056

Editing an Aggregate Stop-Loss Pricing Rule of a Bill Group

Prerequisites

To edit an aggregate stop-loss pricing rule of a bill group, you should have:

- Business Object **C1-PricingRuleASL** defined for aggregate stop-loss pricing rule.

Procedure

To edit an aggregate stop-loss pricing rule of a bill group:

1. Search for the account, person, or policy whose pricing details you want to view in the **Customer 360° View** screen.
2. In the **Search Results** section, click the **View** (🔗) icon corresponding to the account, person, or policy whose pricing details you want to view.
   The **Account**, **Person**, or **Policy** tab in the **Customer 360° Information** screen appears.

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3. Click the **Pricing** tab, in the **Bill Group ASO Policy Pricing Rules** zone click the **Edit** (✎) icon in the **Edit** column corresponding to the pricing rule type for aggregate stop-loss whose aggregate stop-loss pricing rule details you want to edit.

   The **Aggregate Stop-Loss (ASL) Pricing Rule** screen appears. It contains the following sections:

   - **Customer Information** - Displays the customer information for bill group.
   - **Main** - Displays the basic details of the aggregate stop-loss pricing rule.
   - **Accumulation Criteria** - Used to define the accumulation criteria in an aggregate stop-loss pricing rule.
   - **Pricing Information** - Used to define stop-loss eligibility for claim line items.
   - **Characteristics** - Used to define the characteristics for the aggregate stop-loss pricing rule.

   The **Customer Information** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Bill Group Information	Displays the bill group information.	Not applicable
Policy Start Date	Displays the policy start date.	Not applicable
Policy End Date	Displays the policy end date.	Not applicable
Policy Status	Indicates the policy status for pricing rule. The valid values are: • In Force/Active • Post Runout • Runout	Not applicable
Pricing Rule Type	Indicates the pricing rule type.	Not applicable

   The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Price Item	Indicates the price item.	Not applicable
Parent Customer's SSL or ASL Pricing Rules	Indicates the pricing date range derived from the parent customer's specific stop-loss or aggregate stop-loss pricing rule.	Not applicable
Pricing Start Date	Displays the pricing rule start date.	Not applicable
Pricing End Date	Displays the pricing rule end date.	Not applicable
Rate Option	Indicates the rate option of the aggregate stop-loss pricing rule for the price item.	Not applicable

4. Modify the accumulation criteria in an aggregate stop-loss pricing rule, if required.

   Note: You can add, edit, or remove price item and its price item parameters in the accumulation criteria for an aggregate stop-loss, if required.

5. Modify the stop-loss eligibility for claim line items, if required.

   Note: This section also consists of a button, **Reapply Claim Template**, on clicking the button a message occurs indicating that updating the claim template will reset all the default fields on the claim pricing rule.

6. Add, edit, or remove characteristics for an aggregate stop-loss pricing rule, if required.
7. Click **Save**.
   The changes made to an aggregate stop-loss pricing rule for a bill group are saved.

Related Topics

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For more information on...	See...
Customer 360° Information - Pricing tab	Customer 360° Information - Pricing Information on page 641
Bill Group ASO Policy Pricing Rules zone	Bill Group Self-Funded Policy Pricing Rules on page 649
How to define accumulation criteria in an aggregate stop-loss pricing rule	Defining Accumulation Criteria in an Aggregate Stop-Loss Pricing Rule on page 3063
How to define claim pricing information in an aggregate stop-loss pricing rule	Defining Claim Pricing Rules in an Aggregate Stop-Loss Pricing Rule on page 3065
How to define a characteristic for an aggregate stop-loss pricing rule	Defining a Characteristic for an Aggregate Stop-Loss Pricing Rule on page 3056

Viewing an Aggregate Stop-Loss Pricing Rule of a Bill Group

Procedure

To view an aggregate stop-loss pricing rule of a bill group:

1. Search for the account, person, or policy whose pricing details you want to view in the **Customer 360° View** screen.
2. In the **Search Results** section, click the **View** (🔗) icon corresponding to the account, person, *or* policy whose pricing details you want to view.
   The **Account**, **Person**, or **Policy** tab in the **Customer 360° Information** screen appears.
3. Click the **Pricing** tab.
4. In the **Bill Group ASO Policy Information** zone, click the **Broadcast** (📡) icon corresponding to the bill group whose aggregate stop-loss pricing rule bill group details you want to view.
5. In the **Bill Group ASO Policy Pricing Rules** zone, click the link in the **Pricing Rule Information** column corresponding to the aggregate stop-loss pricing rule type *w*hose aggregate stop-loss pricing rule bill group you want to view.
   The **Pricing Rule** screen appears. It contains the following zone:
   - **Aggregate Stop-Loss** - Displays the pricing rule aggregate stop-loss details for a bill group. It contains the following sections:
     - **Main** - Displays the basic details of the aggregate stop-loss pricing rule.
     - **Accumulation Criteria** - Displays the accumulation criteria in an aggregate stop-loss pricing rule.
     - **Pricing Information** - Displays the stop-loss eligibility for claim line items.
     - **Characteristics** - Displays the characteristics defined for the aggregate stop-loss pricing rule.
6. View the basic details of aggregate stop-loss pricing rule in the **Main** section.
7. View the accumulated criteria in the **Accumulation Criteria** section.
8. View the stop-loss eligibility for claim line items in the **Pricing Information** section.
9. View the characteristics of the aggregate stop-loss pricing rule in the **Characteristics** section.

Related Topics

For more information on...	See...
Customer 360° Information - Pricing tab	Customer 360° Information - Pricing Information on page 641
Bill Group ASO Policy Pricing Rules zone	Bill Group Self-Funded Policy Pricing Rules on page 649
Pricing Rule screen	Pricing Rule (Used for Viewing) on page 689
Aggregate Stop-Loss zone	Aggregate Stop-Loss on page 693

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Deleting an Aggregate Stop-Loss Pricing Rule of a Bill Group

Procedure

To delete an aggregate stop-loss pricing rule of a bill group:

1. Search for the account, person, or policy whose pricing details you want to view in the **Customer 360° View** screen.
2. In the **Search Results** section, click the **View** (🔗) icon corresponding to the account, person, *or* policy whose pricing details you want to view.
   The **Account**, **Person**, or **Policy** tab in the **Customer 360° Information** screen appears.
3. Click the **Pricing** tab, in the **Bill Group ASO Policy Pricing Rules** zone, click the **Delete** (🗑) icon in the **Delete** column corresponding to the aggregate stop-loss pricing rule type whose aggregate stop-loss pricing rule you want to delete.
   A message appears confirming whether you want to delete the aggregate stop-loss pricing rule.
4. Click **OK**.
   The aggregate stop-loss pricing rule is deleted.

Related Topics

For more information on...	See...
Customer 360° Information - Pricing tab	Customer 360° Information - Pricing Information on page 641
Bill Group ASO Policy Pricing Rules zone	Bill Group Self-Funded Policy Pricing Rules on page 649

Retention Type Claim Based Pricing

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

Defining a Retention Type Claim Based Pricing Rule Type

Prerequisites

To define a retention type claim based pricing rule type, you should have:

- Business Object **C1-PricingRuleRetTypeClaim** defined for retention type claim based pricing rule type.
- Business Object **C1-PricingRule** defined for pricing rule.
- Pricing rule type category for the retention type claim defined in the application.

Procedure

To define a retention type claim based pricing rule type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **P** and then click **Pricing Rule Type**.
   A sub-menu appears.
3. Click the **Add** option from the **Pricing Rule Type** sub-menu.

   The **Select Business Object** screen appears. It contains the following field:

Field Name	Field Description	Mandatory (Yes or No)
Pricing Rule Type Business Object	Used to indicate the business object using which you want to create the retention type claim based pricing rule type	Yes
	Note: You can create a retention type claim based pricing rule type using the **Claim Pricing Rule Type** business object.	

Tip: Alternatively, you can access this screen by clicking the **Add** button in the **Page Title** area of the **Pricing Rule Type** screen.

4. Select the **Retention Type Claim Based Pricing Rule Type** business object.
5. Click **OK**.

   The **Retention Type Claim Based Pricing Rule Type** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details about the retention type claim based pricing rule type.
   - **Algorithms** - Used to associate the algorithms with the retention type claim based pricing rule type.
   - **Additional Data** - Used to specify the additional information about the retention type claim based pricing rule type.
   - **Price Items** - Used to add the price items for which you can define the retention type claim based pricing rules using the retention type claim based pricing rule type.
   - **Price Item Parameters** - Used to add the price item parameters based on which you want to define the price item pricing.
   - **Characteristics** - Used to define the characteristics for the retention type claim based pricing rule type.
   - **Claim Disposition Details** - Used to define the disposition details of the claims transaction.

   The **Main** section contains the following fields:

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Field Name	Field Description	Mandatory (Yes or No)
Pricing Rule Type	Used to specify the retention type claim based pricing rule type.	Yes
Description	Used to specify the description for the retention type claim based pricing rule type.	Yes
Detailed Description	Used to specify the additional information about the retention type claim based pricing rule type.	No
Pricing Rule Business Object	Used to indicate the retention type claim based pricing rule business object. The valid value is: • Retention Type Claim Based Pricing Rule	Yes
Business Object	Indicate the retention type claim based pricing rule type business object using which you are defining the retention type claim based pricing rule type.	Not applicable
Status	Used to indicate the status of the retention type claim based pricing rule type. The valid values are: • Active • Inactive	Yes
Primary	Used to indicate whether the pricing rule type is a primary pricing rule type. **Note:** You must not select the **Primary** option while defining the retention type claim based pricing rule type.	Not applicable
Pricing Rule Type Category	Used to indicate the category to which the pricing rule type belongs. The valid value is: • Retention Type Claim Based	Yes

6. Enter the required details in the **Main** section.
7. Ensure that **Primary** option is not selected when you are defining a retention type claim based pricing rule type.
8. Associate the following algorithms with the retention type claim based pricing rule type:

System Event	Algorithm	Algorithm Type	Description
Pricing Rule Post Processing	C1-PRCRETPOS	C1-PRCRETPOS	Retention Claim Based - Post Processing
Transaction Validation	C1-RETCLMVAL	C1-RETCLMVAL	Retention Claim Based - Validation

9. Define additional data for the retention type claim based pricing rule type.
10. Add the required price items for retention type claim based pricing rule type.
11. Add price item parameters for the retention type claim based pricing rule type.
12. Define characteristics for the retention type claim based pricing rule type.
13. Add the claim disposition details for retention type claim based pricing rule type.
14. Click **Save**.
    The retention type claim based pricing rule type is defined.

Related Topics

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For more information on...	See...
Pricing Rule Type screen	Pricing Rule Type on page 2942
How to add the related pricing rule types in the primary pricing rule type	Adding Related Pricing Rule Types in a Primary Pricing Rule Type on page 2959
How to define the transaction field mapping in the primary pricing rule type	Defining Transaction Field Mapping in a Primary Pricing Rule Type on page 2961
How to associate algorithms with the pricing rule type	Associating Algorithms with a Pricing Rule Type on page 2967
How to define additional data for the pricing rule type	Defining Additional Data for a Pricing Rule Type on page 2969
How to add pricing items in the pricing rule type	Adding Price Items in a Pricing Rule Type on page 2971
How to add price item parameters in the pricing rule type	Adding a Price Item Parameter in a Pricing Rule Type on page 2973
How to define a characteristic for the pricing rule type	Defining a Characteristic for a Pricing Rule Type on page 2975
How to add claim templates in the claim pricing rule type	Adding Claim Templates in a Claim Pricing Rule Type on page 2977
How to add the claim-specific data in the pricing rule type	Adding the Claim-Specific Data in a Pricing Rule Type on page 2978

Adding Claim Based Disposition Details in a Pricing Rule Type

Prerequisites

To add claim based disposition details in a pricing rule type, you should have:

- Pricing rule types defined in the application.
- Account and Price Item Derivation Algorithm defined in the application.
- Claim Disposition and Disposition Mode defined in the application.

Procedure

To add claim based disposition details in a pricing rule type:

1. Ensure that the **Claim Disposition Details** section is expanded when you are defining *or* editing for a primary pricing rule type.

   The **Claim Disposition Details** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Claim Disposition	Used to specify the type of claim disposition.	No
Disposition Mode	Used to specify the mode of claim disposition.	No

2. Enter the required details in the **Claim Disposition Details** section.

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> **Note:**
>
> If the **Claim Disposition** field in the transaction is set to **Yes,** you must set the disposition mode to **Align Signage**. However, if the **Claim Disposition** field in the transaction is set to **No**, you must set the disposition mode to **Zero Out**.
>
> If the **Disposition Mode** field is set to **Align Signage**, the claim based fees is positive for positive claims and the claim based fees is negative for negative claims. However, if the **Disposition Mode** field is set to **Zero Out**, the claim based fees for the negative claims is set to zero (0).

3. If you want to define more than one claim disposition entry for the primary pricing rule type, click the **Add** (+) icon and then repeat step 2.

> **Note:** However, if you want to remove a claim disposition entry for the primary pricing rule type, click the **Delete** (🗑) icon corresponding to the related pricing rule type.

Related Topics

For more information on...	See...
Defining a retention type claim based pricing rule type	Defining a Retention Type Claim Based Pricing Rule Type on page 3074
How to define related pricing rule types for retention type claim based pricing rule type	Adding Related Pricing Rule Types in a Primary Pricing Rule Type on page 2959
How to define transaction field mapping for retention type claim based pricing rule type	Defining Transaction Field Mapping in a Primary Pricing Rule Type on page 2961
How to associate algorithms for retention type claim based pricing rule type	Associating Algorithms with a Pricing Rule Type on page 2967
How to define additional data for retention type claim based pricing rule type	Defining Additional Data for a Pricing Rule Type on page 2969
How to define price items for retention type claim based pricing rule type	Adding Price Items in a Pricing Rule Type on page 2971
How to define price item parameters for retention type claim based pricing rule type	Adding a Price Item Parameter in a Pricing Rule Type on page 2973
How to define a characteristic for pricing rule type	Defining a Characteristic for a Pricing Rule Type on page 2975

Editing a Retention Type Claim Based Pricing Rule Type

Prerequisites

To edit the retention type claim based pricing rule type, you should have:

- Business Object **C1-PricingRuleRetTypeClaim** defined for the retention type claim based pricing rule type.
- Business Object **C1-PrcRuleTypRetClaimBase** defined for the retention type claim based pricing rule type.
- Pricing rule type category for the retention type claim based pricing rule type defined in the application

Procedure

To edit a retention type claim based pricing rule type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.

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2. From the **Admin** menu, select **P** and then click **Pricing Rule Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Pricing Rule Type** sub-menu.
   The **Pricing Rule Type** screen appears.
4. In the **Pricing Rule Type List** zone, click the **Edit** (✎) icon in the **Edit** column corresponding *t*o the pricing rule type for claim whose details you want to edit.

   The **Retention Type Enrollment Based Pricing Rule Type** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details about the retention type claim based pricing rule type.
   - **Related Pricing Rule Types** - Used to define the pricing rule types which are related to the parent pricing rule type.
   - **Transaction Field Mapping** - Used to specify the transaction related data mapped to the pricing rule type
   - **Algorithms** - Used to define the algorithms used for the retention type claim based pricing rule type.
   - **Additional Data** - Used to specify the additional information about the retention type claim based pricing rule type.
   - **Price Items** - Used to define the price items assigned to the retention type claim based pricing rule type.
   - **Price Item Parameters** - Used to define the price item parameters in the retention type claim based pricing rule type.
   - **Characteristics** - Used to define the characteristics for the retention type claim based pricing rule type.
   - **Claim Templates** - Used to define the pricing rule type for retention type claim based template.
   - **Claim-Specific Additional Data** - Used to specify the retention type claim based specific additional data.

   The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Pricing Rule Type	Displays the pricing rule type.	Not applicable
Description	Used to specify the description for the pricing rule type.	Yes
Detailed Description	Used to specify additional information about the pricing rule type.	No
Related Transaction Business Object	Used to indicate the retention type claim based pricing rule type business object. The valid values are: • Claim Pricing Rule • Aggregate Stop-Loss (ASL) Pricing Rule • Specific Stop-Loss (SSL) Pricing Rule • Retention Type Claim Based Pricing Rule • Retention Type Enrollment Based Pricing Rule	Yes
Business Object	Displays the retention type claim based pricing rule type business object for retention type claim.	Not applicable
Status	Used to indicate the status of the retention type claim based pricing rule type. The valid values are: • Active • Inactive	
Primary	Used to select the checkbox if the retention type claim based pricing rule type is primary.	No

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Field Name	Field Description	Mandatory (Yes or No)
Pricing Rule Type Category	Used to indicate the pricing rule type category for the retention type claim based pricing rule type. The valid values are: • Aggregate Stop-Loss • Claim • Discounted Agreement • Retention Type Claim Based • Retention Type Enrollment Based • Specific Stop-Loss	Yes

Tip: Alternatively, you can click the **Edit** button in the **Pricing Rule Type** zone to edit the pricing rule type for retention type claim.

5. Modify the details in the **Main** section, if required.
6. Add, edit, or remove the related pricing rule types in the retention type claim based pricing rule type, if required.
7. Modify the transaction field mapping in the retention type claim based pricing rule type, if required.
8. Add, edit, or remove algorithms with the retention type claim based pricing rule type, if required.
9. Modify the additional data for the retention type claim based pricing rule type, if required.
10. Add, edit, or remove pricing items in the retention type claim based pricing rule type, if required.
11. Add, edit, or remove price item parameters in the retention type claim based pricing rule type, if required.
12. Add, edit, or remove characteristics for the retention type claim based pricing rule type, if required.
13. Add, edit, or remove claim templates in the retention type claim based pricing rule type, if required.
14. Modify the claim-specific data in the retention type claim based pricing rule type, if required.
15. Click **Save**.
    The changes made to the Retention Type Claim Based Pricing Rule Type are saved.

Related Topics

For more information on...	See...
Pricing Rule Type screen	Pricing Rule Type on page 2942
Pricing Rule Type List zone	Pricing Rule Type List on page 2943
Pricing Rule Type zone	Pricing Rule Type on page 2946

Deleting a Retention Type Claim Based Pricing Rule Type

Procedure

To delete a retention type claim based pricing rule type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **P** and then click **Pricing Rule Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Pricing Rule Type** sub-menu.
   The **Pricing Rule Type** screen appears.
4. In the **Pricing Rule Type List** zone, click the **Delete** (🗑) icon in the **Delete** column corresponding *t*o the retention type claim based pricing rule type that you want to delete.
   A message appears confirming whether you want to delete the retention type claim based pricing rule type.

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> **Note:** You can delete a retention type claim based pricing rule type when it is not yet used in the system.

> **Tip:** Alternatively, you can delete a retention type claim based pricing rule type by clicking the **Delete** button in the **Pricing Rule Type** zone.

5. Click **OK**.
   The retention type claim based pricing rule type is deleted.

Related Topics

For more information on...	See...
Pricing Rule Type screen	Pricing Rule Type on page 2942
Pricing Rule Type List zone	Pricing Rule Type List on page 2943
Pricing Rule Type zone	Pricing Rule Type on page 2946

Viewing the Retention Type Claim Based Pricing Rule Type Details

Procedure

To view the details of a retention type claim based pricing rule type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **P** and then click **Pricing Rule Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Pricing Rule Type** sub-menu.
   The **Pricing Rule Type** screen appears.
4. In the **Pricing Rule Type List** zone, click the **Broadcast** (ᯤ) icon corresponding to the *r*etention type claim based pricing rule type whose details you want to view.
   The **Pricing Rule Type** zone appears.
5. View the details of the retention type claim based pricing rule type in the **Pricing Rule Type** zone.

Related Topics

For more information on...	See...
Pricing Rule Type screen	Pricing Rule Type on page 2942
Pricing Rule Type List zone	Pricing Rule Type List on page 2943
Pricing Rule Type zone	Pricing Rule Type on page 2946

Defining a Retention Type Claim Based Pricing Rule for a Parent Customer

Prerequisites

To define a retention type claim based pricing rule for a parent customer, you should have:

- Business Object **C1-PricingRule** defined for the pricing rule.
- Business Object **C1-PricingRuleRetTypeClaim** defined for retention type claim based pricing rule type.
- Algorithms **C1-APPTXNBAS**, **C1-PRCRETPOS**, and **C1-RETCLMVAL** defined for retention type claim based pricing rule type.

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Note: A custom algorithm type must be created to validate a transaction.

Procedure

To define a retention type claim based pricing rule for a parent customer:

1. Search for a parent customer in the **Customer 360° View** screen.
   The **Search Result** screen appears.
2. In the **Search Results** section, click the **View** (🔗) icon corresponding *t*o the parent customer whose pricing details you want to view.
   The **Person** tab appears in the **Customer 360° Information** screen.
3. Click the **Pricing** tab.
   The **Pricing** tab appears.
4. Click the **Add** link in the upper-right corner of the **Parent Customer Pricing Rules** zone.

   The **Pricing Rule** screen appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Person Name	Indicates the parent customer for whom you want to create a discount arrangement pricing rule type.	Not applicable
Person Type	Displays the person type.	Not applicable
Pricing Rule Type	Used to indicate the pricing rule type. The valid values is: • Retention Type Claim Based Pricing Rule	Yes **Note:** If the pricing rule type is not selected then the application displays an error message.

5. Select the required pricing rule type in the respective field.
6. Click **OK**.
   The **Retention Type Claim Based Pricing Rule** screen appears. It contains the following sections:

   - **Customer Information** - Displays information about the parent customer for whom you are defining the retention type claim based pricing rule. It contains the following fields:

Field Name	Field Description
Parent Customer Information	Indicates the parent customer for whom you are defining the retention type claim based pricing rule.
Pricing Rule Type	Indicates the pricing rule type using which you are defining the retention type claim based pricing rule.

   - **Main** - This section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Price Item	Used to indicate the price item for which you want to define the retention type claim based pricing. The valid value is: • Admin Fee	Yes
Pricing Start Date	Used to specify the start date from when the retention type claim based pricing will be effective for the price item.	Yes (Conditional)

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<table>
<tr><th>Field Name</th><th>Field Description</th><th>Mandatory (Yes or No)</th></tr>
<tr><td></td><td>Note: The pricing start date cannot be later than the pricing end date.</td><td>Note: Pricing Start Date should be entered if Pricing End Date has been mentioned.</td></tr>
<tr><td>Pricing End Date</td><td>Used to specify the end date till when the retention type claim based pricing will be effective for the price item.
Note: The pricing end date cannot be earlier than the pricing start date.</td><td>No</td></tr>
<tr><td>Rate Option</td><td>Used to indicate the rate option that you want to use while defining the pricing for the price item. The valid value is:
• Flat Dollar Per Claim - Agg Daily
On selecting an option from the Rate Option field, following fields appear in a grid:
<table>
<tr><th>Field Name</th><th>Field Description</th><th>Mandatory (Yes or No)</th></tr>
<tr><td>Price Item Parameter</td><td>Used to specify multiple price item parameters based on which you want to determine the price item utilization.
Note:
The Search (🔍) icon appears corresponding to the Price Item Parameter field. On clicking the Search icon, the Price Item Parameter Search screen appears.
On specifying the price item, the description of the price item appears corresponding to the Price Item Parameter field.</td><td>No</td></tr>
<tr><td>Parameter Value</td><td>Used to specify multiple price item parameter values based on which you want to determine the price item utilization.
Note:
The Search (🔍) icon appears corresponding to the Parameter Value field. On clicking the Search icon, the Predefined Parameter Value Search screen appears.
On specifying the price item, the description of the price item appears corresponding to the Parameter Value Search field.</td><td>No</td></tr>
</table></td><td>Not applicable</td></tr>
</table>

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Field Name	Field Description	Mandatory (Yes or No)
	Note: If you want to define more than one price item parameter to the price item in a retention type claim based pricing rule type, click the **Add** (+) icon. However, if you want to remove a price item parameter from the price item in a retention type claim based pricing rule type, click the **Delete** (🗑) icon corresponding to the **Price Item Parameter** field.	
Fee	Used to specify the fee for the price item parameter.	

- **Characteristics** - Used to define the characteristics for the retention type claim based pricing rule for parent customer.

7. Add the required details in the main and characteristics section.
8. Click **Save**.
   The retention type claim based pricing rule for a parent customer is defined.

Note:

If the approval workflow group setting is set as **Active** for the parent customer, for which the retention type claim based pricing rule is defined then an approval transaction is created for that particular parent customer. The retention type claim based pricing rule for a parent customer is defined, once the approval transaction is approved.

Related Topics

For more information on...	See...
How to define a characteristic for a retention type claim based pricing rule.	Defining a Characteristic for a Retention Type Claim Based Pricing Rule on page 3083

Defining a Characteristic for a Retention Type Claim Based Pricing Rule

Prerequisites

To define a characteristic for a retention type claim based pricing rule, you should have:

- Characteristic types defined in the application (where the characteristic entity is set to **Pricing Rule**)

Procedure

To define a characteristic for a retention type claim based pricing rule:

1. Ensure that the **Characteristics** section is expanded when you are defining *o*r editing a retention type claim based pricing rule.

   The **Characteristics** section contains the following fields in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Effective Date	Used to specify from when the pricing rule will be effective.	Yes
Characteristic Type	Used to indicate the characteristic type for the retention type claim based pricing rule of a parent customer.	Yes (Conditional)

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Field Name	Field Description	Mandatory (Yes or No)
		Note: This field is required when you are defining a characteristic for retention type claim based pricing rule.
Characteristic Value	Used to specify the characteristic value for the retention type claim based pricing rule of a parent customer. **Note:** If you select a predefined characteristic type, the **Search** (🔍) icon appears corresponding to the **Characteristic Value** field. On clicking the **Search** icon, the **Predefined Characteristic Search** window appears. On specifying the value for a predefined characteristic type, the description of the characteristic value appears corresponding to the **Characteristic Value** field.	Yes (Conditional) **Note:** This field is required when you are defining a characteristic for retention type claim based pricing rule.

2. Enter the required details in the **Characteristics** section.
3. If you want to define more than one characteristic for retention type claim based pricing rule, click the **Add** (+) icon and then repeat step 2.

> **Note:** However, if you want to remove a characteristic from retention type claim based pricing rule, click the **Delete** (🗑) icon corresponding to the characteristic.

4. Click **Save**.
   The characteristics are defined for the retention type claim based pricing rule.

Related Topics

For more information on...	See...
How to define a retention type claim based pricing rule for a parent customer	Defining a Retention Type Claim Based Pricing Rule for a Parent Customer on page 3080

Editing a Retention Type Claim Based Pricing Rule of a Parent Customer

Prerequisites

To edit a retention type claim based pricing rule of a parent customer, you should have:

- Business Object **C1-PricingRule** defined for the pricing rule.
- Business Object **C1-PricingRuleRetTypeClaim** defined for retention type claim based pricing rule type.
- Algorithms **C1-APPTXNBAS**, **C1-PRCRETPOS**, and **C1-RETCLMVAL** defined for retention type claim based pricing rule type.

> **Note:** A custom algorithm type must be created to validate a transaction.

Procedure

To edit a retention type claim based pricing rule of a parent customer:

1. Search for a parent customer in the **Customer 360° View** screen.
2. In the **Search Results** section, click the **View** (🔗) icon corresponding to the parent customer *w*hose pricing details you want to view.

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The **Person** tab appears in the **Customer 360° Information** screen.

3. Click the **Pricing** tab. It consists of the following zones:
   The **Pricing** tab appears.
4. In the **Parent Customer Pricing Rules** zone, click the **Edit** (✎) icon in the **Edit** column *c*orresponding to the retention type claim based pricing rule, whose details you want to edit.

   The **Retention Type Claim Based Pricing Rule** screen appears. It contains the following zones:

   - **Customer Information** - Displays information about the parent customer for whom the retention type claim based pricing rule is defined. It contains the following fields:

Field Name	Field Description
Parent Customer Information	Indicates the parent customer for whom the discount arrangement pricing rule is defined.
Pricing Rule Type	Displays the pricing rule type that is chosen to define the retention type claim based pricing rule of a parent customer.

   - **Main** - This section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Price Item	Indicates the price item for which you want to define the pricing.	Not applicable
Pricing Start Date	Used to specify the start date from when the pricing will be effective for the price item. **Note:** The pricing start date cannot be later than the pricing end date.	Yes (Conditional) **Note:** Pricing Start Date should be entered if Pricing End Date has been mentioned.
Pricing End Date	Used to specify the end date till when the pricing will be effective for the price item. **Note:** The pricing end date cannot be earlier than the pricing start date.	No
Rate Option	Used to indicate the rate option that you want to use while defining the pricing for the price item. The valid value is: • Flat Dollar Per Claim - Agg Daily On clicking the **Add** (+) icon, the following fields appear in a grid:	Not applicable

Field Name	Field Description	Mandatory (Yes or No)
Price Item Parameter	Used to specify multiple price item parameters based on which you want to determine the price item utilization.	No

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<table>
<tr><th>Field Name</th><th>Field Description</th><th>Mandatory (Yes or No)</th></tr>
<tr><td></td><td>
<table>
<tr><th>Field Name</th><th>Field Description</th><th>Mandatory (Yes or No)</th></tr>
<tr><td></td><td>Note:
The Search (🔍) icon appears corresponding to the Price Item Parameter field. On clicking the Search icon, the Price Item Parameter Search screen appears.
On specifying the price item, the description of the price item appears corresponding to the Price Item Parameter field.</td><td></td></tr>
<tr><td>Parameter Value</td><td>Used to specify multiple price item parameter values based on which you want to determine the price item utilization.
Note:
The Search (🔍) icon appears corresponding to the Parameter Value field. On clicking the Search icon, the Predefined Parameter Value Search screen appears.
On specifying the price item, the description of the price item appears corresponding to the Parameter Value Search field.</td><td>No</td></tr>
</table>
Note:
If you want to define more than one price item parameter to the price item in a retention type claim based pricing rule type, click the Add (+) icon.
However, if you want to remove a price item parameter from the price item in a retention type claim based pricing rule type, click the Delete (🗑) icon corresponding to the Price Item Parameter field.
</td><td></td></tr>
<tr><td>Fee</td><td>Used to specify the fee for the price item parameter.</td><td>Not applicable</td></tr>
</table>

- **Characteristics** - Used to define the characteristics for the retention type claim based pricing rule for parent customer. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Effective Date	Used to specify the effective date from when the characteristic is effective for the retention type claim based pricing rule of a parent customer.	No

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Field Name	Field Description	Mandatory (Yes or No)
Characteristic Type	Used to indicate the characteristic type for the retention type claim based pricing rule of a parent customer.	No
Characteristic Value	Used to specify the characteristic value for the retention type claim based pricing rule of a parent customer. **Note:** If you select a predefined characteristic type, the **Search** (🔍) icon appears corresponding to the Characteristic Value field. On clicking the **Search** icon, the Predefined Characteristic Search window appears. On specifying the value for a predefined characteristic type, the description of the characteristic value appears corresponding to the Characteristic Value field.	No

Note:

If the approval workflow group setting is set as **Active** for the parent customer, for which the retention type claim based pricing rule is edited then an approval transaction is created for that particular parent customer. The retention type claim based pricing rule for a parent customer is defined, once the approval transaction is approved.

5. Click **Save**.
   The retention type claim based pricing rule of a parent customer is edited.

Related Topics

For more information on...	See...
Customer 360° Information - Pricing tab	Customer 360° Information - Pricing Information on page 641
Parent Customer Pricing Rules zone	Parent Customer Pricing Rules on page 643
How to search for a parent customer	Searching for a Person on page 597
How to define the characteristics for a retention type claim based pricing rule	Defining a Characteristic for a Retention Type Claim Based Pricing Rule on page 3083

Deleting a Retention Type Claim Based Pricing Rule of a Parent Customer

Procedure

To delete a retention type claim based pricing rule of a parent customer:

1. Search for a parent customer in the **Customer 360° Information** screen.
2. In the **Search Results** section, click the **View** (🔗) icon corresponding *t*o the parent customer whose pricing details you want to view.
   The **Person** tab in the **Customer 360° Information** screen.
3. Click the **Pricing** tab. It consists of the following zones:
   The **Pricing** tab appears.
4. In the **Parent Customer Pricing Rules** zone, click the **Delete** (🗑) icon in the **Delete** column corresponding to the retention type claim based pricing rule that you want to delete.
   A message appears confirming whether you want to delete the retention type claim based pricing rule type of a parent customer.
5. Click **OK**.
   The retention type claim based pricing rule of a parent customer is deleted.

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Related Topics

For more information on...	See...
How to search for a parent customer	Searching for a Person on page 597
Parent Customer Pricing Rules zone	Parent Customer Pricing Rules on page 643

Defining a Retention Type Claim Based Pricing Rule for a Bill Group

Prerequisites

To define a retention type claim based pricing rule for a bill group, you should have:

- Business Object **C1-PricingRule** and **C1-PricingRuleType**, and **C1-PricingGroup** defined for the pricing rule.
- Business Object **C1-PolicyBOStatusReason** defined for the policy status.
- Business Object **C1-PricingRuleRetTypeClaim** defined for retention type claim based pricing rule type.
- Algorithms **C1-APPTXNBAS**, **C1-PRCRETPOS**, **C1-RETCLMVAL**, **C1-PRRTPREP**, **C1-PRCRLTY** defined for retention type claim based pricing rule type.

Note: A custom algorithm type must be created to validate a transaction.

Procedure

To define a retention type claim based pricing rule for a bill group:

1. Search for the Administrative Services Only (ASO) person, whose person type is set to **Bill Group**, in the **Customer 360° View** screen.
2. In the **Search Results** section, click the **View** (🔗) icon corresponding to the person *w*hose pricing details you want to view.
   The **Person** tab appears in the **Customer 360° Information** screen.
3. Click the **Pricing** tab.
   The **Pricing** tab appears.
4. Click the **Broadcast** (📡) icon in the **Bill Group ASO Policy Information** zone, corresponding to the **Bill Group Information** column, whose bill group details you want to view.
   The **Bill Group ASO Policy Pricing Rules** zone is displayed.
5. Click the **Add** link in the upper right corner of the **Bill Group ASO Policy Pricing Rules** zone.

   The **Pricing Rule** screen appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Person Name	Indicates the name of the parent customer.	Not applicable
Person Type	Indicates the type of the parent customer. **Note:** If you are defining the pricing rule type for the parent customer, then the person type will be **Parent Customer**.	Not applicable
Pricing Rule Type	Used to indicate the pricing rule type using which you want to create a retention type claim based pricing rule. **Note:** Select the **Retention Type Claim Based Pricing Rule Type** option, as the pricing rule type.	Yes **Note:** If the pricing rule type is not selected then the application displays an error message.
Pricing Group	Used to indicate the pricing group for the bill group.	No

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Field Name	Field Description	Mandatory (Yes or No)
	Note: Select the pricing group option when the retention type claim based pricing rule has to be defined for a bill group using the pricing group.	
Policy Status	Used to indicate the policy status for the bill group. The valid values are: • In Force/Active • Post Runout • Runout	Yes (Conditional) **Note:** Policy Status is required once the Pricing Rule Type is selected.

6. Select the appropriate fields in the **Main** section.
7. Click **OK**.
   The **Retention Type Claim Based Pricing Rule** screen appears. It contains the following sections:

   - **Main** - This section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Price Item	Used to indicate the price item for which you want to define the pricing. The valid value are: • Admin Fee	Yes
Pricing Start Date	Used to specify the start date from when the pricing will be effective for the price item.	Yes (Conditional) **Note:** Pricing Start Date should be entered if Pricing End Date has been mentioned.
Pricing End Date	Used to specify the end date till when the pricing will be effective for the price item.	No
Rate Option	Used to specify the rate option for the price item. The valid value are: • Flat Dollar Per Claim - Agg Daily	Yes
Price Item Parameter	Used to specify multiple price item parameters based on which you want to determine the price item utilization. **Note:** The Search (🔍) icon does appear corresponding to this field. On clicking the **Search** icon, the **Price Item Parameters** screen appears.	No
Parameter Value	Used to specify multiple price item parameter values based on which you want to determine the price item utilization. **Note:** The Search (🔍) icon does appear corresponding to this field. On clicking the **Search** icon, the **Parameter Value Search** screen appears.	No
Fee	Used to specify the fee for the price item parameter.	No

   - **Characteristics** - Used to define the characteristics for the retention type claim based pricing rule for a bill group.

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8. Add the required details in the main and characteristics section.
9. Click **Save**.
   The retention type claim based pricing rule for a bill group is defined.

> **Note:**
>
> If the approval workflow group setting is set as **Active** for the bill group, for which the retention type claim based pricing rule is defined then an approval transaction is created for that particular bill group. The retention type claim based pricing rule for a bill group is defined, once the approval transaction is approved.

Related Topics

For more information on...	See...
How to define a characteristic for a retention type claim based pricing rule.	Defining a Characteristic for a Retention Type Claim Based Pricing Rule on page 3090

Defining a Characteristic for a Retention Type Claim Based Pricing Rule

Prerequisites

To define a characteristic for a retention type claim based pricing rule, you should have:

- Characteristic types defined in the application (where the characteristic entity is set to **Pricing Rule**)

Procedure

To define a characteristic for a retention type claim based pricing rule:

1. Ensure that the **Characteristics** section is expanded when you are defining or editing a *r*etention type claim based pricing rule.

   The **Characteristics** section contains the following columns in a grid:

Column Name	Column Description	Mandatory (Yes or No)
Effective Date	Used to specify from when the pricing rule will be effective.	Yes
Characteristic Type	Used to indicate the characteristic type. The valid values are: • Eligible for Billing **Note:** The list includes only those characteristic types where the characteristic entity is set to **Pricing Rule Type**.	Yes (Conditional) **Note:** This field is required when you are defining a characteristic for retention type claim based pricing rule.
Characteristic Value	Used to specify the value for the characteristic type. **Note:** If you select a predefined characteristic type, the **Search** (🔍) icon appears corresponding to the **Characteristic Value** field. On clicking the **Search** icon, the **Predefined Characteristic Search** window appears. On specifying the value for a predefined characteristic type, the description of the characteristic value appears corresponding to the **Characteristic Value** field.	Yes (Conditional) **Note:** This field is required when you are defining a characteristic for retention type claim based pricing rule.

2. Enter the required details in the **Characteristics** section.

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3. If you want to define more than one characteristic for retention type claim based pricing rule, click the **Add** (+) icon and then repeat step 2.

> **Note:** However, if you want to remove a characteristic from retention type claim based pricing rule, click the **Delete** (🗑) icon corresponding to the characteristic.

4. Click **Save**.
   The characteristics are defined for the retention type claim based pricing rule.

Related Topics

For more information on...	See...
How to define a retention type claim based pricing rule for a bill group	Defining a Retention Type Claim Based Pricing Rule for a Bill Group on page 3088

Editing a Retention Type Claim Based Pricing Rule of a Bill Group

Prerequisites

To edit a retention type claim based pricing rule of a parent customer, you should have:

- Business Object **C1-PricingRule** defined for the pricing rule.
- Business Object **C1-PricingRuleRetTypeClaim** defined for retention type claim based pricing rule type.
- Algorithms **C1-APPTXNBAS**, **C1-PRCRETPOS**, and **C1-RETCLMVAL** defined for retention type claim based pricing rule type.

> **Note:** A custom algorithm type must be created to validate a transaction.

Procedure

To edit a retention type claim based pricing rule of a bill group:

1. Search for a bill group in the **Customer 360° View** screen.
2. In the **Search Results** section, click the **View** (🔗) icon corresponding to the bill group *w*hose pricing details you want to view.
   The **Person** tab appears in the **Customer 360° Information** screen.
3. Click the **Pricing** tab.
   The **Pricing** tab appears.
4. Click the **Broadcast** (📡) icon in the **Bill Group ASO Policy Information** zone, corresponding to the **Bill Group Information** column, whose bill group details you want to view.
   The **Bill Group ASO Policy Pricing Rules** zone appears.
5. Click the **Edit** (✎) icon in the **Bill Group ASO Policy Pricing Rules** zone, corresponding to the **Pricing Rule Type** column, whose details you want to edit.

   The **Retention Type Claim Based Pricing Rule** screen appears. It contains the following zones:

   - **Customer Information** - Displays the basic information about the customer. It contains the following fields:

Column Name	Column Description
Bill Group Information	Displays the bill group name.
Policy Start Date	Displays the date from when the policy is effective.
Policy End Date	Displays the date till when the policy is effective.
Policy Status	Displays the status of the policy.

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Column Name	Column Description
Pricing Rule Type	Displays the pricing rule type that is chosen to define the retention type claim based pricing rule of a bill group.

- **Main** - This section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Price Item	Indicates the price item for which you want to define the pricing.	Not applicable
Pricing Start Date	Used to specify the start date from when the pricing will be effective for the price item. **Note:** Pricing Start Date should be entered if Pricing End Date has been mentioned.	Yes (Conditional)
Pricing End Date	Used to specify the end date till when the pricing will be effective for the price item.	No
Rate Option	Indicates the rate option for the price item.	Not applicable
Price Item Parameter	Used to specify multiple price item parameters based on which you want to determine the price item utilization. **Note:** The Search (🔍) icon does appear corresponding to this field. On clicking the **Search** icon, the **Price Item Parameters** screen appears.	No
Parameter Value	Used to specify multiple price item parameter values based on which you want to determine the price item utilization. **Note:** The Search (🔍) icon does appear corresponding to this field. On clicking the **Search** icon, the **Parameter Value Search** screen appears.	No
Fee	Indicates the fee for the price item parameter.	Not applicable

- **Characteristics** - Used to define the characteristics for the retention type claim based pricing rule for parent customer. *I*t contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Effective Date	Used to specify the effective date from when the characteristic is effective for the retention type claim based pricing rule of a bill group.	No
Characteristic Type	Used to indicate the characteristic type for the retention type claim based pricing rule of a bill group. The valid values are: • Eligible for Billing	No
Characteristic Value	Used to specify the characteristic value for the retention type claim based pricing rule of a bill group.	No

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Field Name	Field Description	Mandatory (Yes or No)
	Note: If you select a predefined characteristic type, the **Search** (🔍) icon appears corresponding to the Characteristic Value field. On clicking the **Search** icon, the Predefined Characteristic Search window appears. On specifying the value for a predefined characteristic type, the description of the characteristic value appears corresponding to the Characteristic Value field.	

6. Click **Save**.

   The **Approval Transaction Information** pop-up window appears with the Approval Transaction ID that is generated by the application.

7. Click **OK**
   The retention type claim based pricing rule of a bill group is edited.

> **Note:**
>
> If the approval workflow group setting is set as **Active** for the bill group, for which the retention type claim based pricing rule is defined then an approval transaction is created for that particular bill group. The retention type claim based pricing rule for a bill group is defined, once the approval transaction is approved.

Related Topics

For more information on...	See...
How to define a retention type claim based pricing rule of a parent customer	Defining a Retention Type Claim Based Pricing Rule for a Parent Customer on page 3080

Deleting a Retention Type Claim Based Pricing Rule of a Bill Group

Procedure

To delete a retention type claim based pricing rule of a bill group:

1. Search for a bill group in the **Customer 360° View** screen.
2. In the **Search Results** section, click the **View** (🔗) icon corresponding to the bill group *w*hose pricing details you want to view.
   The **Person** tab appears in the **Customer 360° Information** screen.
3. Click the **Pricing** tab.
   The **Pricing** tab appears.
4. Click the **Broadcast** (📡) icon in the **Bill Group ASO Policy Information** zone, corresponding to the **Bill Group Information** column, whose bill group details you want to delete.
   The **Bill Group ASO Policy Pricing Rules** zone appears.
5. Click the **Delete** (🗑) icon in the **Delete** column corresponding to the **Pricing Group Information** column, whose bill group information you want to delete.
   A message appears confirming whether you want to delete the retention type claim based pricing rule of a bill group.

> **Note:** You can delete a retention type claim based pricing rule when it is not yet used in the system.

6. Click **OK**.
   The retention type claim based pricing rule of a bill group is deleted.

Related Topics

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For more information on...	See...
How to define a characteristic for a retention type claim based pricing rule.	Defining a Characteristic for a Retention Type Claim Based Pricing Rule on page 3083

Defining a Retention Type Claim Based Pricing Rule for a Bill Group Using a Pricing Group

Procedure

To define a retention type claim based pricing rule for a bill group using pricing group:

1. Search for the Administrative Services Only (ASO) person, whose person type is set to **Bill Group**, in the **Customer 360° View** screen.
2. In the **Search Results** section, click the **View** (🔗) icon corresponding to the bill group *w*hose pricing details you want to view.
   The **Person** tab appears in the **Customer 360° Information** screen.
3. Click the **Pricing** tab.
   The **Pricing** tab appears.
4. Click the **Broadcast** (📡) icon in the **Bill Group ASO Policy Information** zone, corresponding to the **Bill Group Information** column, whose bill group details you want to view.
   The **Bill Group ASO Policy Pricing Rules** zone is displayed.
5. Click the **Add** link in the upper right corner of the **Bill Group ASO Policy Pricing Rules** zone.

   The **Pricing Rule** screen appears. It contains the following sections:

   - **Main** - This section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Person Name	Displays the person name.	Not applicable
Person Type	Displays the person type.	Not applicable
Pricing Rule Type	Used to indicate the pricing rule type. The valid values are: • Aggregate Stop-Loss (ASL) Pricing Rule • Claim Pricing Rule • Discount Arrangement Pricing Rule • Retention Type Claim Based Pricing Rule • Retention Type Enrollment Based Pricing Rule • Specific Stop-Loss (SSL) Pricing Rule **Note:** Select the **Retention Type Claim Based Pricing Rule** option, as the pricing rule type.	Yes **Note:** If the pricing rule type is not selected then the application displays an error message.
Pricing Group	Used to indicate the pricing group for the bill group. **Note:** You must select a pricing group for the bill group on which the retention type claim based pricing rule is to be defined.	Yes
Policy Status	Used to indicate the policy status for the bill group. The valid values are: • In Force/Active • Post Runout	Yes (Conditional)

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Field Name	Field Description	Mandatory (Yes or No)
	• Runout	**Note:** Policy Status is required once the Pricing Rule Type is selected.

6. Select the appropriate fields in the **Main** section.
7. Click **OK**.
   The **Retention Type Claim Based Pricing Rule** screen appears. It contains the following sections:
   - **Main** - This section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Price Item	Used to indicate the price item for which you want to define the pricing. The valid value are: • Admin Fee	Yes
Pricing Start Date	Used to specify the start date from when the pricing will be effective for the price item.	Yes (Conditional) **Note:** Pricing Start Date should be entered if Pricing End Date has been mentioned.
Pricing End Date	Used to specify the end date till when the pricing will be effective for the price item.	No
Rate Option	Used to specify the rate option for the price item. The valid value are: • Flat Dollar Per Claim - Agg Daily	Yes
Pricing Group Rule Code	Displays the code of the pricing group rule.	Not applicable
Description	Displays the description of the pricing group rule.	Not applicable
Price Item Parameter	Used to specify multiple price item parameters based on which you want to determine the price item utilization. **Note:** The Search (🔍) icon does appear corresponding to this field. On clicking the **Search** icon, the **Price Item Parameters** screen appears.	No
Parameter Value	Used to specify multiple price item parameter values based on which you want to determine the price item utilization. **Note:** The Search (🔍) icon does appear corresponding to this field. On clicking the **Search** icon, the **Parameter Value Search** screen appears.	No
Fee	Used to specify the fee for the price item parameter.	No

   - **Characteristics** - Used to define the characteristics for the Retention Type Claim Based Pricing Rule for a Bill Group Using a Pricing Group.
8. Add the required details in the main and characteristics section.
9. Click **Save**.

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The retention type claim based pricing rule for a bill group using a pricing group is defined.

Note:

If the approval workflow group setting is set as **Active** for the bill group, for which the retention type claim based pricing rule is defined then an approval transaction is created for that particular bill group. The retention type claim based pricing rule for a bill group using a pricing group is defined, once the approval transaction is approved.

Related Topics

For more information on...	See...
How to define a characteristic for a retention type claim based pricing rule for a bill group using pricing group.	Defining a Characteristic for a Retention Type Claim Based Pricing Rule for a Bill Group Using a Pricing Group on page 3096

Defining a Characteristic for a Retention Type Claim Based Pricing Rule for a Bill Group Using a Pricing Group

Prerequisites

To define a characteristic for a retention type claim based pricing rule for a bill group using a pricing group, you should have:

- Characteristic types defined in the application (where the characteristic entity is set to **Pricing Rule**)

Procedure

To define a characteristic for a retention type claim based pricing rule for a bill group using a pricing group:

1. Ensure that the **Characteristics** section is expanded when you are defining or editing a retention type claim based pricing rule for a bill group using a pricing group.

   The **Characteristics** section contains the following columns in a grid:

Column Name	Column Description	Mandatory (Yes or No)
Effective Date	Used to specify from when the pricing rule will be effective.	Yes
Characteristic Type	Used to indicate the characteristic type. The valid values are: • Eligible for Billing **Note:** The list includes only those characteristic types where the characteristic entity is set to **Pricing Rule Type**.	Yes (Conditional) **Note:** This field is required when you are defining a characteristic for retention type claim based pricing rule for a bill group using a pricing group.
Characteristic Value	Used to specify the value for the characteristic type.	Yes (Conditional)

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Column Name	Column Description	Mandatory (Yes or No)
	Note: If you select a predefined characteristic type, the **Search** (🔍) icon appears corresponding to the **Characteristic Value** field. On clicking the **Search** icon, the **Predefined Characteristic Search** window appears. On specifying the value for a predefined characteristic type, the description of the characteristic value appears corresponding to the **Characteristic Value** field.	**Note:** This field is required when you are defining a characteristic for retention type claim based pricing rule for a bill group using a pricing group.

2. Enter the required details in the **Characteristics** section.
3. If you want to define more than one characteristic, click the **Add** (+) icon and then repeat step 2.

Note: However, if you want to remove a characteristic, click the **Delete** (🗑) icon corresponding to the characteristic.

4. Click **Save**.
   The characteristics are defined for the retention type claim based pricing rule for a bill group using a pricing group.

Related Topics

For more information on...	See...
How to define a retention type claim based pricing rule for a bill group using a pricing group.	Defining a Retention Type Claim Based Pricing Rule for a Bill Group Using a Pricing Group on page 3094

Viewing a Retention Type Claim Based Pricing Rule of a Parent Customer

Procedure

To view a retention type claim based pricing rule for a parent customer:

1. Search for a parent customer whose pricing details you want to view in the **Customer 360° View** screen.
2. In the **Search Results** section, click the **View** (🔗) icon corresponding to *t*he parent customer whose pricing details you want to view.
   The **Person** tab appears in the **Customer 360° Information** screen appears.
3. Click the **Pricing** tab.
   The **Pricing** tab appears.
4. In the **Parent Customer Pricing Rules** zone, click the link in the **Pricing Rule Information** column corresponding to the pricing rule type whose details you want to view.

   The **Pricing Rule** screen appears. It contains the following zone:

   - **Retention Type Claim Based** - Displays Retention Type Claim Based Pricing Rule of a Parent. It contains the following sections:
     - **Main** - Displays the basic details of the retention type claim based pricing rule of a parent customer.
     - **Price Item Parameters** - Displays the price item parameters defined for the retention type claim based pricing rule of a parent customer.
     - **Characteristics** - Displays the characteristics defined for the retention type claim based pricing rule of a parent customer.
5. View the basic details of a retention type claim based pricing rule of a parent customer in the **Main** section.
6. View the price item parameters of a retention type claim based pricing rule of a parent customer in the **Price Item Parameters** section.

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7. View the characteristics of a retention type claim based pricing rule of a parent customer in the **Characteristics** section.

Related Topics

For more information on...	See...
Customer 360° Information - Pricing tab	Customer 360° Information - Pricing Information on page 641

Viewing a Retention Type Claim Based Pricing Rule of a Bill Group

Procedure

To view a retention type claim based pricing rule of a bill group:

1. Search for a bill group in the **Customer 360° View** screen.
2. In the **Search Results** section, click the **View** (🔗) icon corresponding to the bill group *w*hose pricing details you want to view.
   The **Person** tab appears in the **Customer 360° Information** screen.
3. Click the **Pricing** tab.
   The **Pricing** tab appears.
4. Click the **Broadcast** (📡) icon in the **Bill Group ASO Policy Information** zone, corresponding to the **Bill Group Information** column, whose bill group details you want to view.
   The **Bill Group ASO Policy Pricing Rules** zone appears.
5. In the **Bill Group ASO Policy Pricing Rules** zone, click the link in the **Pricing Rule Information** column corresponding to the pricing rule type whose details you want to view.

   The **Pricing Rule** screen appears. It contains the following zone:

   - **Retention Type Claim Based** - Displays Retention Type Claim Based Pricing Rule of a Bill Group. It contains the following sections:
     - **Main** - Displays the basic details of the retention type claim based pricing rule of a bill group.
     - **Price Item Parameters** - Displays the price item parameters defined for the retention type claim based pricing rule of a bill group.
     - **Characteristics** - Displays the characteristics defined for the retention type claim based pricing rule of a bill group.
6. View the basic details of a retention type claim based pricing rule of a bill group in the **Main** section.
7. View the price item parameters of a retention type claim based pricing rule of a bill group in the **Price Item Parameters** section.
8. View the characteristics of a retention type claim based pricing rule of a bill group in the **Characteristics** section.

Related Topics

For more information on...	See...
Customer 360° Information - Pricing tab	Customer 360° Information - Pricing Information on page 641

Retention Type Enrollment Based Pricing

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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- Whether you want to exempt the retrospective transactions while calculating retention type enrollment based fees.
- Price item parameters based on which you want to define the pricing.

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

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

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

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

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

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

Defining a Retention Type Enrollment Based Pricing Rule Type

Prerequisites

To define a retention type retention based pricing rule type, you should have:

- Business Object **C1-PrcRuleTypRetEnrollBased** defined for retention type enrollment based pricing rule type.
- Business Object **C1-PricingRuleRetTypeEnroll** defined for pricing rule.
- Pricing rule type category for the retention type enrollment defined in the application.

Procedure

To define a retention type retention based pricing rule type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **P** and then click **Pricing Rule Type**.
   A sub-menu appears.
3. Click the **Add** option from the **Pricing Rule Type** sub-menu.

   The **Select Business Object** screen appears. It contains the following field:

Field Name	Field Description	Mandatory (Yes or No)
Pricing Rule Type Business Object	Used to indicate the business object using which you want to create the retention type enrollment based pricing rule type. **Note:** You can create a retention type enrollment based pricing rule type using the **Claim Pricing Rule Type** business object.	Yes

Tip: Alternatively, you can access this screen by clicking the **Add** button in the **Page Title** area of the **Pricing Rule Type** screen.

4. Select the **Retention Type Claim Based Pricing Rule Type** business object.
5. Click **OK**.

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The **Retention Type Claim Based Pricing Rule Type** screen appears. It contains the following sections:

- **Main** - Used to specify basic details about the retention type enrollment based pricing rule type.
- **Related Pricing Rule Types** - Used to define the pricing rule types which are related to the enrollment based parent pricing rule type.
- **Transaction Field Mapping** - Used to specify the transaction related data mapped to the enrollment based pricing rule type.
- **Algorithms** - Used to define the algorithms used for the enrollment based pricing rule type.
- **Additional Data** - Used to specify the additional information about the enrollment based pricing rule type.
- **Price Items** - Used to define the price items assigned to the enrollment based pricing rule type.
- **Price Item Parameters** - Used to define the price item parameters in the enrollment based pricing rule type.
- **Characteristics** - Used to define the characteristics for the enrollment based pricing rule type.
- **Enrollment-Specific Additional Data** - Used to specify the enrollment specific additional data.

The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Pricing Rule Type	Used to specify the pricing rule type.	Yes
Description	Used to specify the description for the pricing rule type.	Yes
Detailed Description	Used to specify additional information about the pricing rule type.	No
Related Transaction Business Object	Used to indicate the pricing rule business object. The valid values are: • Aggregate Stop-Loss (ASL) Pricing Rule • Claim Pricing Rule • Discount Arrangement Pricing Rule • Retention Type Claim Based Pricing Rule • Retention Type Enrollment Based Pricing Rule • Specific Stop-Loss (SSL) Pricing Rule	Yes
Business Object	Indicate the retention type enrollment based pricing rule type business object for the claim.	Not applicable
Status	Used to indicate the status of the pricing rule type. The valid values are: • Active • Inactive	
Primary	Used to select the checkbox if the pricing rule type is primary.	No
Pricing Rule Type Category	Used to indicate the pricing rule type category for the pricing rule type. The valid values are: • Aggregate Stop-Loss • Claim • Discount Arrangement • Retention Type Claim Based • Retention Type Enrollment Based • Specific Stop-Loss	Yes

6. Enter the required details in the **Main** section.
7. Add the related pricing rule types in the primary pricing rule type, if required.

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> **Note: Related Pricing Rule Types** section appears when the pricing rule type is primary.

8. Define the transaction field mapping in the primary pricing rule type, if required.

> **Note: Transaction Field Mapping** section appears when the pricing rule type is primary.

9. Associate algorithms with the enrollment based pricing rule type, if required.
10. Define additional data for the enrollment based pricing rule type, if required.
11. Add pricing items in the enrollment based pricing rule type, if required.
12. Add price item parameters in the enrollment based pricing rule type, if required.
13. Define characteristics for the enrollment based pricing rule type, if required.
14. Add the enrollment-specific data, if required.
15. Click **Save**.
    The retention type enrollment based pricing rule type is defined.

Related Topics

For more information on...	See...
Pricing Rule Type screen	Pricing Rule Type on page 2942
How to add the related pricing rule types in the primary pricing rule type	Adding Related Pricing Rule Types in a Primary Pricing Rule Type on page 2959
How to define the transaction field mapping in the primary pricing rule type	Defining Transaction Field Mapping in a Primary Pricing Rule Type on page 2961
How to associate algorithms with the pricing rule type	Associating Algorithms with a Pricing Rule Type on page 2967
How to define additional data for the pricing rule type	Defining Additional Data for a Pricing Rule Type on page 2969
How to add pricing items in the pricing rule type	Adding Price Items in a Pricing Rule Type on page 2971
How to add price item parameters in the pricing rule type	Adding a Price Item Parameter in a Pricing Rule Type on page 2973
How to define a characteristic for the pricing rule type	Defining a Characteristic for a Pricing Rule Type on page 2975
How to add claim templates in the claim pricing rule type	Adding Claim Templates in a Claim Pricing Rule Type on page 2977
How to add the claim-specific data in the pricing rule type	Adding the Claim-Specific Data in a Pricing Rule Type on page 2978

Adding the Enrollment Specific Data in a Pricing Rule Type

Prerequisites

To add enrollment specific data in a pricing rule type, you should have:

- Pricing rule types defined in the application.
- Account and Price Item Derivation Algorithm defined in the application.
- Bill Group Derivation Algorithm defined in the application.

Procedure

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To add enrollment specific data in a pricing rule type in a pricing rule type:

1. Ensure that the **Enrollment-Specific Additional Data** section is expanded when you are *a*dding enrollment specific data for a primary pricing rule type.

   The **Enrollment-Specific Additional Data** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Retroactivity Indicator Value	Used to specify that retroactivity indicator value should not be a part of enrollment based pricing rule type. **Note:** Set the retroactivity indicator value to **R** if the field should be excluded from enrollment based pricing rule types.	No

2. Enter the required details in the **Enrollment-Specific Additional Data** section.
3. Click **Save**.
   The enrollment-specific data has been added in the pricing rule type.

Related Topics

For more information on...	See...
Defining a retention type enrollment based pricing rule type	Defining a Retention Type Enrollment Based Pricing Rule Type on page 3100

Editing a Retention Type Enrollment Based Pricing Rule Type

Prerequisites

To edit the retention type enrollment based pricing rule type, you should have:

- Business Object **C1-PricingRuleRetTypeEnroll** defined for the retention type enrollment based pricing rule type.
- Business Object **C1-PrcRuleTypRetEnrollBased** defined for the retention type enrollment based pricing rule type.
- Pricing rule type category for retention type enrollment based pricing rule type defined in the application

Procedure

To edit a retention type enrollment based pricing rule type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **P** and then click **Pricing Rule Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Pricing Rule Type** sub-menu.
   The **Pricing Rule Type** screen appears.
4. In the **Pricing Rule Type List** zone, click the **Edit** (✎) icon in the **Edit** column corresponding *t*o the pricing rule type for claim whose details you want to edit.

   The **Retention Type Enrollment Based Pricing Rule Type** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details about the retention type enrollment based pricing rule type.
   - **Related Pricing Rule Types** - Used to define the pricing rule types which are related to the retention type enrollment based pricing rule type.
   - **Transaction Field Mapping** - Used to specify the transaction related data mapped to the pricing rule type.
   - **Algorithms** - Used to define the algorithms used for the retention type enrollment based pricing rule type.
   - **Additional Data** - Used to specify the additional information about the retention type enrollment based pricing rule type.

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- **Price Items** - Used to define the price items assigned to the retention type enrollment based pricing rule type.
- **Price Item Parameters** - Used to define the price item parameters in the retention type enrollment based pricing rule type.
- **Characteristics** - Used to define the characteristics for the retention type enrollment based pricing rule type.
- **Claim Templates** - Used to define the pricing rule type for the retention type enrollment based pricing rule type.
- **Claim-Specific Additional Data** - Used to specify the retention type enrollment based specific additional data.

The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Pricing Rule Type	Displays the pricing rule type.	Not applicable
Description	Used to specify the description for the pricing rule type.	Yes
Detailed Description	Used to specify additional information about the pricing rule type.	No
Related Transaction Business Object	Used to indicate the retention type claim based pricing rule type business object. The valid values are: • Claim Pricing Rule • Aggregate Stop-Loss (ASL) Pricing Rule • Specific Stop-Loss (SSL) Pricing Rule • Retention Type Claim Based Pricing Rule • Retention Type Enrollment Based Pricing Rule	Yes
Business Object	Displays the retention type enrollment based pricing rule type business object for retention type claim.	Not applicable
Status	Used to indicate the status of the retention type enrollment based pricing rule type. The valid values are: • Active • Inactive	
Primary	Used to select the checkbox if the retention type enrollment based pricing rule type is primary.	No
Pricing Rule Type Category	Used to indicate the pricing rule type category for the retention type enrollment based pricing rule type. The valid values are: • Aggregate Stop-Loss • Claim • Discounted Agreement • Retention Type Claim Based • Retention Type Enrollment Based • Specific Stop-Loss	Yes

Tip: Alternatively, you can click the **Edit** button in the **Pricing Rule Type** zone to edit the pricing rule type for retention type enrollment.

5. Modify the details in the **Main** section, if required.
6. Add, edit, or remove the related pricing rule types in the retention type enrollment based pricing rule type, if required.

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7. Modify the transaction field mapping in the retention type enrollment based pricing rule type, if required.
8. Add, edit, or remove algorithms with the retention type enrollment based pricing rule type, if required.
9. Modify the additional data for the retention type enrollment based pricing rule type, if required.
10. Add, edit, or remove pricing items in the retention type enrollment based pricing rule type, if required.
11. Add, edit, or remove price item parameters in the retention type enrollment based pricing rule type, if required.
12. Add, edit, or remove characteristics for the retention type enrollment based pricing rule type, if required.
13. Modify the enrollment-specific data in the retention type enrollment based pricing rule type, if required.
14. Click **Save**.
    The changes made to the Retention Type Enrollment Based Pricing Rule Type are saved.

Related Topics

For more information on...	See...
Pricing Rule Type screen	Pricing Rule Type on page 2942
Pricing Rule Type List zone	Pricing Rule Type List on page 2943
Pricing Rule Type zone	Pricing Rule Type on page 2946

Deleting a Retention Type Enrollment Based Pricing Rule Type

Procedure

To delete a retention type enrollment based pricing rule type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **P** and then click **Pricing Rule Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Pricing Rule Type** sub-menu.
   The **Pricing Rule Type** screen appears.
4. In the **Pricing Rule Type List** zone, click the **Delete** (🗑) icon in the **Delete** column corresponding *t*o the retention type enrollment based pricing rule type that you want to delete.
   A message appears confirming whether you want to delete the retention type enrollment based pricing rule type.

   Note: You can delete a retention type enrollment based pricing rule type when it is not yet used in the system.

   Tip: Alternatively, you can delete a retention type enrollment based pricing rule type by clicking the **Delete** button in the **Pricing Rule Type** zone.
5. Click **OK**.
   The retention type enrollment based pricing rule type is deleted.

Related Topics

For more information on...	See...
Pricing Rule Type screen	Pricing Rule Type on page 2942
Pricing Rule Type List zone	Pricing Rule Type List on page 2943
Pricing Rule Type zone	Pricing Rule Type on page 2946

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Viewing the Retention Type Enrollment Based Pricing Rule Type Details

Procedure

To view the details of a retention type enrollment based pricing rule type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **P** and then click **Pricing Rule Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Pricing Rule Type** sub-menu.
   The **Pricing Rule Type** screen appears.
4. In the **Pricing Rule Type List** zone, click the **Broadcast** (📡) icon corresponding to the retention type *e*nrollment based pricing rule type whose details you want to view.
   The **Pricing Rule Type** zone appears.
5. View the details of the retention type enrollment based pricing rule type in the **Pricing Rule Type** zone.

Related Topics

For more information on...	See...
Pricing Rule Type screen	Pricing Rule Type on page 2942
Pricing Rule Type List zone	Pricing Rule Type List on page 2943
Pricing Rule Type zone	Pricing Rule Type on page 2946

Defining a Retention Type Enrollment Based Pricing Rule for a Parent Customer

Prerequisites

To define a retention type enrollment based pricing rule for a parent customer, you should have:

- Business Object **C1-PricingRule** defined for the pricing rule.
- Business Object **C1-PrcRuleTypRetEnrollBased** defined for retention type enrollment based pricing rule type.
- Algorithms **C1-APPTXNBAS** defined for retention type enrollment based pricing rule type.

> **Note:** A custom algorithm type must be created to validate a transaction.

Procedure

To define a retention type enrollment based pricing rule for a parent customer:

1. Search for a parent customer in the **Customer 360° View** screen.
   The **Search Result** screen appears.
2. In the **Search Results** section, click the **View** (🔗) icon corresponding to the parent customer *w*hose pricing details you want to view.
   The **Person** tab appears in the **Customer 360° Information** screen.
3. Click the **Pricing** tab.
   The **Pricing** tab appears.
4. Click the **Add** link in the upper-right corner of the **Parent Customer Pricing Rules** zone.

   The **Pricing Rule** screen appears. It contains the following fields:

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Field Name	Field Description	Mandatory (Yes or No)
Person Name	Displays the person name.	Not applicable
Person Type	Displays the person type.	Not applicable
Pricing Rule Type	Used to indicate the pricing rule type. The valid values are: • Retention Type Enrollment Based Pricing Rule	Yes **Note:** If the pricing rule type is not selected then the application displays an error message.

5. Select the required pricing rule type in the respective field.
6. Click **OK**.
   The **Retention Type Enrollment Based Pricing Rule** screen appears. It contains the following sections:

   - **Customer Information** - Displays information about the parent customer for whom you are defining the retention type enrollment based pricing rule. It contains the following fields:

Field Name	Field Description
Parent Customer Information	Indicates the parent customer for whom you are defining the retention type enrollment based pricing rule.
Pricing Rule Type	Indicates the pricing rule type using which you are defining the retention type enrollment based pricing rule.

   - **Main** - This section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Price Item	Used to indicate the price item for which you want to define the pricing. The valid value are: • Administrative Services Fees • Administrative Services Fees (No Mandatory Parameters) • AS_RET_ENRB • Consultant Oversight Fees	Yes
Pricing Start Date	Used to specify the start date from when the pricing will be effective for the price item. **Note:** The pricing start date cannot be later than the pricing end date.	Yes (Conditional) **Note:** Pricing Start Date should be entered if Pricing End Date has been mentioned.
Pricing End Date	Used to specify the end date till when the retention type enrollment based pricing will be effective for the price item. **Note:** The pricing end date cannot be earlier than the pricing start date.	No
Rate Option	Used to specify the rate option for the price item. The valid values are: • Flat Dollar Per Claim - Agg Daily • Retention - Aggregate Monthly • Claims	Yes

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<table>
<tr><th>Field Name</th><th>Field Description</th><th>Mandatory (Yes or No)</th></tr>
<tr><td></td><td>
• Percentage of Claim - Agg Daily
• Flat Dollar Per Claim - Agg Daily
On selecting an option from the Rate Option field, following fields appear in a grid:
<table>
<tr><th>Field Name</th><th>Field Description</th><th>Mandatory (Yes or No)</th></tr>
<tr><td>Price Item Parameter</td><td>Used to specify multiple price item parameters based on which you want to determine the price item utilization.</td><td>No</td></tr>
<tr><td></td><td>Note:
The Search (🔍) icon appears corresponding to the Price Item Parameter field. On clicking the Search icon, the Price Item Parameter Search screen appears.
On specifying the price item, the description of the price item appears corresponding to the Price Item Parameter field.</td><td></td></tr>
<tr><td>Parameter Value</td><td>Used to specify multiple price item parameter values based on which you want to determine the price item utilization.</td><td>No</td></tr>
<tr><td></td><td>Note:
The Search (🔍) icon appears corresponding to the Parameter Value field. On clicking the Search icon, the Predefined Parameter Value Search screen appears.
On specifying the price item, the description of the price item appears corresponding to the Parameter Value Search field.</td><td></td></tr>
</table>
</td><td></td></tr>
</table>

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Field Name	Field Description	Mandatory (Yes or No)
	Note: If you want to define more than one price item parameter to the price item in a retention type enrollment based pricing rule type, click the **Add** (+) icon. However, if you want to remove a price item parameter from the price item in a retention type enrollment based pricing rule type, click the **Delete** (🗑) icon corresponding to the **Price Item Parameter** field.	
Exempt Retro Transactions	Used to indicate that retro transactions should not be considered for calculation purposes.	No
Fee	Used to specify the fee for the price item parameter.	No

- **Characteristics** - Used to define the characteristics for the retention type enrollment based pricing rule for a parent customer.

7. Add the required details in the main and characteristics section.
8. Click **Save**.
   The retention type enrollment based pricing rule for a parent customer is defined.

Note:

If the approval workflow group setting is set as **Active** for the parent customer, for whom the retention type enrollment based pricing rule is defined then an approval transaction is created for that particular parent customer. The retention type enrollment based pricing rule for a parent customer is defined, once the approval transaction is approved.

Related Topics

For more information on...	See...
How to define a characteristic for a retention type enrollment based pricing rule.	Defining a Characteristic for a Retention Type Enrollment Based Pricing Rule on page 3109

Defining a Characteristic for a Retention Type Enrollment Based Pricing Rule

Prerequisites

To define a characteristic for a retention type enrollment based pricing rule, you should have:

- Characteristic types defined in the application (where the characteristic entity is set to **Pricing Rule**)

Procedure

To define a characteristic for a retention type claim based pricing rule:

1. Ensure that the **Characteristics** section is expanded when you are defining *or* editing a retention type enrollment based pricing rule.

   The **Characteristics** section contains the following columns in a grid:

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Column Name	Column Description	Mandatory (Yes or No)
Effective Date	Used to specify from when the pricing rule will be effective.	Yes
Characteristic Type	Used to indicate the characteristic type. The valid values are: • Eligible for Billing **Note:** The list includes only those characteristic types where the characteristic entity is set to **Pricing Rule Type**.	Yes (Conditional) **Note:** This field is required when you are defining a characteristic for retention type enrollment based pricing rule.
Characteristic Value	Used to specify the value for the characteristic type. **Note:** If you select a predefined characteristic type, the **Search** (🔍) icon appears corresponding to the **Characteristic Value** field. On clicking the **Search** icon, the **Predefined Characteristic Search** window appears. On specifying the value for a predefined characteristic type, the description of the characteristic value appears corresponding to the **Characteristic Value** field.	Yes (Conditional) **Note:** This field is required when you are defining a characteristic for retention type enrollment based pricing rule.

2. Enter the required details in the **Characteristics** section.
3. If you want to define more than one characteristic for retention type enrollment based pricing rule, click the **Add** (+) icon and then repeat step 2.

> **Note:** However, if you want to remove a characteristic from retention type enrollment based pricing rule, click the **Delete** (🗑) icon corresponding to the characteristic.

4. Click **Save**.
   The characteristics are defined for the retention type enrollment based pricing rule.

Related Topics

For more information on...	See...
How to define a retention type enrollment based pricing rule for a parent customer	Defining a Retention Type Enrollment Based Pricing Rule for a Parent Customer on page 3106

Editing a Retention Type Enrollment Based Pricing Rule of a Parent Customer

Prerequisites

To edit a retention type enrollment based pricing rule of a parent customer, you should have:

- Business Object **C1-PricingRule** defined for the pricing rule.
- Business Object **C1-PrcRuleTypRetEnrollBased** defined for retention type enrollment based pricing rule type.
- Algorithms **C1-APPTXNBAS** defined for retention type enrollment based pricing rule type.

> **Note:** A custom algorithm type must be created to validate a transaction.

Procedure

To edit a retention type enrollment based pricing rule of a parent customer:

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1. Search for a parent customer in the **Customer 360° View** screen.
2. In the **Search Results** section, click the **View** (🔗) icon corresponding to the parent customer whose pricing details you want to view.
   The **Person** tab appears in the **Customer 360° Information** screen.
3. Click the **Pricing** tab.
   The **Pricing** tab appears.
4. In the **Parent Customer Pricing Rules** zone, click the **Edit** (✎) icon in the **Edit** column corresponding to the retention type enrollment based pricing rule, whose details you want to edit.

   The **Retention Type Enrollment Based Pricing Rule** screen appears. It contains the following zones:

   - **Customer Information** - Displays the basic information about the customer. It contains the following fields:

Column Name	Column Description
Parent Customer Information	Displays the parent name.
Pricing Rule Type	Displays the pricing rule type that is chosen to define the retention type claim based pricing rule of a parent customer.

   - **Main** - This section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Price Item	Indicates the price item for which you want to define the pricing.	Not applicable
Pricing Start Date	Used to specify the start date from when the pricing will be effective for the price item.	Yes (Conditional) **Note:** Pricing Start Date should be entered if Pricing End Date has been mentioned.
Pricing End Date	Used to specify the end date till when the pricing will be effective for the price item.	No
Rate Option	Indicates the rate option for the price item.	Not applicable
Exempt Retro Transactions	Used to indicate that retro transactions should not be considered for calculation purposes.	No
Price Item Parameter	Used to specify multiple price item parameters based on which you want to determine the price item utilization. **Note:** The Search (🔍) icon does appear corresponding to this field. On clicking the **Search** icon, the **Price Item Parameters** screen appears.	No
Parameter Value	Used to specify multiple price item parameter values based on which you want to determine the price item utilization. **Note:** The Search (🔍) icon does appear corresponding to this field. On clicking the **Search** icon, the **Parameter Value Search** screen appears.	No
Fee	Indicates the fee for the price item parameter.	Not applicable

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- **Characteristics** - Used to define the characteristics for the Retention Type Enrollment based pricing rule for parent customer. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Effective Date	Used to specify the effective date from when the characteristic is effective for the retention type enrollment based pricing rule of a parent customer.	No
Characteristic Type	Used to indicate the characteristic type for the retention type enrollment based pricing rule of a parent customer. The valid values are: • Eligible for Billing	No
Characteristic Value	Used to specify the characteristic value for the retention type enrollment based pricing rule of a parent customer. **Note:** If you select a predefined characteristic type, the **Search** (🔍) icon appears corresponding to the Characteristic Value field. On clicking the **Search** icon, the Predefined Characteristic Search window appears. On specifying the value for a predefined characteristic type, the description of the characteristic value appears corresponding to the Characteristic Value field.	No

5. Click **Save**.

> **Note:**
>
> If the approval workflow group setting is set as **Active** for the parent customer, for which the retention type enrollment based pricing rule is defined then an approval transaction is created for that particular parent customer. The retention type enrollment based pricing rule for a parent customer is defined, once the approval transaction is approved.

6. Click **OK**
   The retention type enrollment based pricing rule of a parent customer is edited.

Related Topics

For more information on...	See...
Customer 360° Information - Pricing tab	Customer 360° Information - Pricing Information on page 641
Parent Customer Pricing Rules zone	Parent Customer Pricing Rules on page 643
How to search for a parent customer	Searching for a Person on page 597
How to define the characteristics for a retention type enrollment based pricing rule	Defining a Characteristic for a Retention Type Enrollment Based Pricing Rule on page 3109

Deleting a Retention Type Enrollment Based Pricing Rule of a Parent Customer

Procedure

To delete a retention type enrollment based pricing rule of a parent customer:

1. Search for a parent customer in the **Customer 360° View** screen.

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2. In the **Search Results** section, click the **View** (🔗) icon corresponding to the parent customer *w*hose pricing details you want to view.
   The **Person** tab in the **Customer 360° Information screen** appears.
3. Click the **Pricing** tab.
   The **Pricing** tab appears.
4. In the **Parent Customer Pricing Rules** zone, click the **Delete** (🗑) icon in the **Delete** column *c*orresponding to the retention type enrollment based pricing rule that you want to delete.
   A message appears confirming whether you want to delete the retention type enrollment based pricing rule.

> **Note:** You can delete a retention type enrollment based pricing rule when it is not yet used in the system.

5. Click **OK**.
   The retention type enrollment based pricing rule of a parent customer is deleted.

Related Topics

For more information on...	See...
How to search for a parent customer	Searching for a Person on page 597
Parent Customer Pricing Rules zone	Parent Customer Pricing Rules on page 643

Defining a Retention Type Enrollment Based Pricing Rule for a Bill Group

Prerequisites

To define a retention type enrollment based pricing rule for a bill group, you should have:

- Business Object **C1-PricingRule** and **C1-PricingRuleType**, and **C1-PricingGroup** defined for the pricing rule.
- Business Object **C1-PolicyBOStatusReason** defined for the policy status.
- Business Object **C1-PrcRuleTypRetEnrollBased** defined for retention type enrollment based pricing rule type.
- Algorithms **C1-APPTXNBAS** defined for retention type enrollment based pricing rule type.

> **Note:** A custom algorithm type must be created to validate a transaction.

Procedure

To define a retention type enrollment based pricing rule for a bill group:

1. Search for the Administrative Services Only (ASO) person, whose person type is set to **Bill Group**, in the **Customer 360° View** screen.
2. In the **Search Results** section, click the **View** (🔗) *i*con corresponding to the person *w*hose pricing details you want to view.
   The **Person** tab appears in the **Customer 360° Information** screen.
3. Click the **Pricing** tab.
   The **Pricing** tab appears.
4. Click the **Broadcast** (📡) icon in the **Bill Group ASO Policy Information** zone, corresponding to the **Bill Group Information** column, whose bill group details you want to view.
   The **Bill Group ASO Policy Pricing Rules** zone is displayed.
5. Click the **Add** link in the upper right corner of the **Bill Group ASO Policy Pricing Rules** zone.

   The **Pricing Rule** screen appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Person Name	Indicates the name of the parent customer.	Not applicable
Person Type	Indicates the type of the parent customer.	Not applicable

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Field Name	Field Description	Mandatory (Yes or No)
	Note: If you are defining the pricing rule type for the parent customer, then the person type will be **Parent Customer**.	
Pricing Rule Type	Used to indicate the pricing rule type using which you want to create a retention type enrollment based pricing rule. **Note:** Select the **Retention Type Enrollment Based Pricing Rule** option, as the pricing rule type.	Yes **Note:** If the pricing rule type is not selected then the application displays an error message.
Pricing Group	Used to indicate the pricing group for the bill group. **Note:** Select the pricing group option when the retention type enrollment based pricing rule has to be defined for a bill group using the pricing group.	No
Policy Status	Used to indicate the policy status for the bill group. The valid values are: • In Force/Active • Post Runout • Runout	Yes (Conditional) **Note:** Policy Status is required once the Pricing Rule Type is selected.

6. Select the appropriate fields in the **Main** section.
7. Click **OK**.

The **Retention Type Enrollment Based Pricing Rule** screen appears. It contains the following sections:

- **Main** - This section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Price Item	Used to indicate the price item for which you want to define the pricing. The valid value are: • Administrative Services Fees • Administrative Services Fees (No Mandatory Parameters) • AS_RET_ENRB • Consultant Oversight Fees	Yes
Pricing Start Date	Used to specify the start date from when the pricing will be effective for the price item.	Yes (Conditional) **Note:** Pricing Start Date should be entered if Pricing End Date has been mentioned.
Pricing End Date	Used to specify the end date till when the pricing will be effective for the price item. **Note:** If the pricing end date is mentioned, once the price parameters and fees have been already entered, then the price parameter value and fee field values are reset.	No

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Field Name	Field Description	Mandatory (Yes or No)
Rate Option	Used to specify the rate option for the price item. The valid values are: • Flat Dollar Per Claim - Agg Daily • Retention - Aggregate Monthly • Claims • Percentage of Claim - Agg Daily • Flat Dollar Per Claim - Agg Daily	Yes
Exempt Retro Transactions	Used to indicate that retro transactions should not be considered for calculation purposes.	No
Pricing Group Rule Code	Displays the name of the pricing group rule code. **Note:** If a particular bill group has a single or multiple pricing group rule codes then all of those pricing group rule codes are shown along with their respective description.	No
Price Item Parameter	Used to specify multiple price item parameters based on which you want to determine the price item utilization. **Note:** The Search (🔍) icon does appear corresponding to this field. On clicking the **Search** icon, the **Price Item Parameters** screen appears.	No
Parameter Value	Used to specify multiple price item parameter values based on which you want to determine the price item utilization. **Note:** The Search (🔍) icon does appear corresponding to this field. On clicking the **Search** icon, the **Parameter Value Search** screen appears.	No
Fee	Used to specify the fee for the price item parameter.	No

- **Characteristics** - Used to define the characteristics for the retention type enrollment based pricing rule for a bill group.

8. Add the required details in the main and characteristics section.
9. Click **Save**.
   The retention type enrollment based pricing rule for a bill group is defined.

Note:

If the approval workflow group setting is set as **Active** for the bill group, for which the retention type enrollment based pricing rule is defined then an approval transaction is created for that particular bill group. The retention type enrollment based pricing rule for a bill group is defined, once the approval transaction is approved.

Related Topics

For more information on...	See...
How to define a characteristic for a retention type enrollment based pricing rule for a bill group.	Defining a Characteristic for a Retention Type Enrollment Based Pricing Rule on page 3116

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Defining a Characteristic for a Retention Type Enrollment Based Pricing Rule

Prerequisites

To define a characteristic for a retention type enrollment based pricing rule, you should have:

- Characteristic types defined in the application (where the characteristic entity is set to **Pricing Rule**)

Procedure

To define a characteristic for a retention type enrollment based pricing rule:

1. Ensure that the **Characteristics** section is expanded when you are defining or editing a *r*etention type claim based pricing rule.

   The **Characteristics** section contains the following columns in a grid:

Column Name	Column Description	Mandatory (Yes or No)
Effective Date	Used to specify from when the pricing rule will be effective.	Yes
Characteristic Type	Used to indicate the characteristic type. The valid values are: • Eligible for Billing **Note:** The list includes only those characteristic types where the characteristic entity is set to **Pricing Rule Type**.	Yes (Conditional) **Note:** This field is required when you are defining a characteristic for retention type enrollment based pricing rule.
Characteristic Value	Used to specify the value for the characteristic type. **Note:** If you select a predefined characteristic type, the **Search** (🔍) icon appears corresponding to the **Characteristic Value** field. On clicking the **Search** icon, the **Predefined Characteristic Search** window appears. On specifying the value for a predefined characteristic type, the description of the characteristic value appears corresponding to the **Characteristic Value** field.	Yes (Conditional) **Note:** This field is required when you are defining a characteristic for retention type enrollment based pricing rule.

2. Enter the required details in the **Characteristics** section.
3. If you want to define more than one characteristic for retention type enrollment based pricing rule, click the **Add** (+) icon and then repeat step 2.

   Note: However, if you want to remove a characteristic from retention type enrollment based pricing rule, click the **Delete** (🗑) icon corresponding to the characteristic.

4. Click **Save**.
   The characteristics are defined for the retention type enrollment based pricing rule.

Related Topics

For more information on...	See...
How to define a retention type enrollment based pricing rule for a bill group	Defining a Retention Type Enrollment Based Pricing Rule for a Bill Group on page 3113

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Editing a Retention Type Enrollment Based Pricing Rule of a Bill Group

Prerequisites

To edit a retention type enrollment based pricing rule of a bill group, you should have:

- Business Object **C1-PricingRule** defined for the pricing rule.
- Business Object **C1-PrcRuleTypRetEnrollBased** defined for retention type enrollment based pricing rule type.
- Algorithms **C1-APPTXNBAS** defined for retention type enrollment based pricing rule type.

> **Note:** A custom algorithm type must be created to validate a transaction.

Procedure

To edit a retention type enrollment based pricing rule of a bill group:

1. Search for a bill group in the **Customer 360° View** screen.
2. In the **Search Results** section, click the **View** (🔗) icon corresponding to the bill group *w*hose pricing details you want to view.
   The **Person** tab appears in the **Customer 360° Information** screen.
3. Click the **Pricing** tab.
   The **Pricing** tab appears.
4. Click the **Broadcast** (📡) icon in the **Bill Group ASO Policy Information** zone, corresponding to the **Bill Group Information** column, whose bill group details you want to view.
   The **Bill Group ASO Policy Pricing Rules** zone appears.
5. Click the **Edit** (✎) icon in the **Bill Group ASO Policy Pricing Rules** zone, corresponding to the **Pricing Rule Type** column, whose details you want to edit.

   The **Retention Type Enrollment Based Pricing Rule** screen appears. It contains the following zones:

   - **Customer Information** - Displays the basic information about the customer. It contains the following fields:

Column Name	Column Description
Bill Group Information	Displays the bill group name.
Policy Start Date	Displays the date from when the policy is effective.
Policy End Date	Displays the date till when the policy is effective.
Policy Status	Displays the status of the policy.
Pricing Group	Displays the pricing group information.
Pricing Rule Type	Displays the pricing rule type that is chosen to define the retention type claim based pricing rule of a bill group.

   - **Main** - This section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Price Item	Indicates the price item for which you want to define the pricing.	Not applicable
Pricing Start Date	Used to specify the start date from when the pricing will be effective for the price item.	Yes (Conditional)

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Field Name	Field Description	Mandatory (Yes or No)
		Note: Pricing Start Date should be entered if Pricing End Date has been mentioned.
Pricing End Date	Used to specify the end date till when the pricing will be effective for the price item.	No
Rate Option	Indicates the rate option for the price item.	Not applicable
Exempt Retro Transactions	Used to indicate that retro transactions should not be considered for calculation purposes.	No
Pricing Group Rule Code	Displays the name of the pricing group rule code. **Note:** If a particular bill group has a single or multiple pricing group rule codes then all of those pricing group rule codes are shown along with their respective description.	Not applicable
Price Item Parameter	Used to specify multiple price item parameters based on which you want to determine the price item utilization. **Note:** The Search (🔍) icon does appear corresponding to this field. On clicking the **Search** icon, the **Price Item Parameters** screen appears.	No
Parameter Value	Used to specify multiple price item parameter values based on which you want to determine the price item utilization. **Note:** The Search (🔍) icon does appear corresponding to this field. On clicking the **Search** icon, the **Parameter Value Search** screen appears.	No
Fee	Indicates the fee for the price item parameter.	Not applicable

Note: If you want to define more than one price item parameter information, click the **Add** (+) icon. However, if you want to remove more than one price item or price item bundle, click the Delete (🗑) icon corresponding to the price item parameter.

- **Characteristics** - Used to define the characteristics for the retention type claim based pricing rule for parent customer. *I*t contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Effective Date	Used to specify the effective date from when the characteristic is effective for the retention type claim based pricing rule of a bill group.	No
Characteristic Type	Used to indicate the characteristic type for the retention type claim based pricing rule of a bill group. The valid values are: • Eligible for Billing	No

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Field Name	Field Description	Mandatory (Yes or No)
Characteristic Value	Used to specify the characteristic value for the retention type claim based pricing rule of a bill group. **Note:** If you select a predefined characteristic type, the **Search** (🔍) icon appears corresponding to the Characteristic Value field. On clicking the **Search** icon, the Predefined Characteristic Search window appears. On specifying the value for a predefined characteristic type, the description of the characteristic value appears corresponding to the Characteristic Value field.	No

Note: If you want to define more than one characteristic, click the **Add** (+) icon. However, if you want to remove more than one characteristic, click the Delete (🗑) icon corresponding to the characteristic.

6. Click **Save**.

Note:

If the approval workflow group setting is set as **Active** for the bill group, for which the retention type enrollment based pricing rule is defined then an approval transaction is created for that particular bill group. The retention type enrollment based pricing rule for a bill group is defined, once the approval transaction is approved.

7. Click **OK**
   The retention type enrollment based pricing rule of a bill group is edited.

Related Topics

For more information on...	See...
How to define a retention type enrollment based pricing rule of a parent customer	Defining a Retention Type Enrollment Based Pricing Rule for a Parent Customer on page 3106

Deleting a Retention Type Enrollment Based Pricing Rule of a Bill Group

Procedure

To delete a retention type enrollment based pricing rule of a bill group:

1. Search for the Administrative Services Only (ASO) person, whose person type is set to **Bill Group**, in the **Customer 360° View** screen.
2. In the **Search Results** section, click the **View** (🔗) icon corresponding to the person *w*hose pricing details you want to view.
   The **Person** tab appears in the **Customer 360° Information** screen.
3. Click the **Pricing** tab.
   The **Pricing** tab appears.
4. Click the **Broadcast** (📡) icon in the **Bill Group ASO Policy Information** zone, corresponding to the **Bill Group Information** column, whose bill group details you want to view.
   The **Bill Group ASO Policy Pricing Rules** zone appears.
5. Click the **Delete** (🗑) icon in the **Bill Group ASO Policy Pricing Rules** zone, corresponding to the **Pricing Rule Type** column, whose details you want to edit.
   A message appears confirming whether you want to delete the retention type enrollment based pricing rule of a bill group.
6. Click **OK**.

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The retention type enrollment based pricing rule of a bill group is deleted.

Related Topics

For more information on...	See...
How to define retention type enrollment based pricing rule for a bill group	Defining a Retention Type Enrollment Based Pricing Rule for a Bill Group on page 3113

Defining a Retention Type Enrollment Based Pricing Rule for a Bill Group Using a Pricing Group

Procedure

To define a retention type enrollment based pricing rule for a bill group using pricing group:

1. Search for the Administrative Services Only (ASO) person, whose person type is set to **Bill Group**, in the **Customer 360° View** screen.
2. In the **Search Results** section, click the **View** (🔗) icon corresponding to the person *w*hose pricing details you want to view.
   The **Person** tab appears in the **Customer 360° Information** screen.
3. Click the **Pricing** tab.
   The **Pricing** tab appears.
4. Click the **Broadcast** (📡) icon in the **Bill Group ASO Policy Information** zone, corresponding to the **Bill Group Information** column, whose bill group details you want to view.
   The **Bill Group ASO Policy Pricing Rules** zone is displayed.
5. Click the **Add** link in the upper right corner of the **Bill Group ASO Policy Pricing Rules** zone.

   The **Pricing Rule** screen appears. It contains the following sections:

   - **Main** - This section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Person Name	Displays the person name.	Not applicable
Person Type	Displays the person type.	Not applicable
Pricing Rule Type	Used to indicate the pricing rule type. The valid values are: • Aggregate Stop-Loss (ASL) Pricing Rule • Claim Pricing Rule • Discount Arrangement Pricing Rule • Retention Type Claim Based Pricing Rule • Retention Type Enrollment Based Pricing Rule • Specific Stop-Loss (SSL) Pricing Rule **Note:** Select the **Retention Type Enrollment Based Pricing Rule** option, as the pricing rule type.	Yes **Note:** If the pricing rule type is not selected then the application displays an error message.
Pricing Group	Used to indicate the pricing group for the bill group. **Note:** You must select a pricing group for the bill group on which a retention type enrollment based pricing rule is to be defined.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
Policy Status	Used to indicate the policy status for the bill group. The valid values are: • In Force/Active • Post Runout • Runout	Yes (Conditional) **Note:** Policy Status is required once the Pricing Rule Type is selected.

6. Select the appropriate fields in the **Main** section.
7. Click **OK**.
   The **Retention Type Enrollment Based Pricing Rule** screen appears. It contains the following sections:

   - **Main** - This section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Price Item	Used to indicate the price item for which you want to define the pricing. The valid value are: • Administrative Services Fees • Administrative Services Fees (No Mandatory Parameters) • AS_RET_ENRB • Consultant Oversight Fees	Yes
Pricing Start Date	Used to specify the start date from when the pricing will be effective for the price item.	Yes (Conditional) **Note:** Pricing Start Date should be entered if Pricing End Date has been mentioned.
Pricing End Date	Used to specify the end date till when the pricing will be effective for the price item. **Note:** If the pricing end date is mentioned, once the price parameters and fees have been already entered, then the price parameter value and fee field values are reset.	No
Rate Option	Used to specify the rate option for the price item. The valid values are: • Flat Dollar Per Claim - Agg Daily • Retention - Aggregate Monthly • Claims • Percentage of Claim - Agg Daily • Flat Dollar Per Claim - Agg Daily	Yes
Exempt Retro Transactions	Used to indicate that retro transactions should not be considered for calculation purposes.	No
Pricing Group Rule Code	Displays the code of the pricing group rule.	Not applicable
Description	Displays the description of the pricing group rule.	Not applicable
Price Item Parameter	Used to specify multiple price item parameters based on which you want to determine the price item utilization.	No

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The Search (🔍) icon does appear corresponding to this field. On clicking the **Search** icon, the **Price Item Parameters** screen appears.	
Parameter Value	Used to specify multiple price item parameter values based on which you want to determine the price item utilization.	No
	Note: The Search (🔍) icon does appear corresponding to this field. On clicking the **Search** icon, the **Parameter Value Search** screen appears.	
Fee	Used to specify the fee for the price item parameter.	No

Note: If you want to define more than one price item parameter information, click the **Add** (+) icon. However, if you want to remove more than one price item or price item bundle, click the Delete (🗑) icon corresponding to the price item parameter.

- **Characteristics** - Used to define the characteristics for the Retention Type Enrollment Based Pricing Rule for a Bill Group Using a Pricing Group.

8. Add the required details in the main and characteristics section.
9. Click **Save**.
   The retention type claim based pricing rule for a bill group using a pricing group is defined.

   If the approval workflow group setting is set as **Active** for the bill group, for which the retention type enrollment based pricing rule is defined then an approval transaction is created for that particular bill group. The retention type enrollment based pricing rule for a bill group using a pricing group is defined, once the approval transaction is approved.

Related Topics

For more information on...	See...
How to define a characteristic for a retention type enrollment based pricing rule for a bill group using pricing group.	Defining a Characteristic for a Retention Type Enrollment Based Pricing Rule for a Bill Group Using a Pricing Group on page 3122

Defining a Characteristic for a Retention Type Enrollment Based Pricing Rule for a Bill Group Using a Pricing Group

Prerequisites

To define a characteristic for a retention type enrollment based pricing rule for a bill group using a pricing group, you should have:

- Characteristic types defined in the application (where the characteristic entity is set to **Pricing Rule**)

Procedure

To define a characteristic for a retention type enrollment based pricing rule for a bill group using a pricing group:

1. Ensure that the **Characteristics** section is expanded when you are defining *or* editing a retention type claim based pricing rule for a bill group using a pricing group.

   The **Characteristics** section contains the following columns in a grid:

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Column Name	Column Description	Mandatory (Yes or No)
Effective Date	Used to specify from when the pricing rule will be effective.	Yes
Characteristic Type	Used to indicate the characteristic type. The valid values are: • Eligible for Billing **Note:** The list includes only those characteristic types where the characteristic entity is set to **Pricing Rule Type**.	Yes (Conditional) **Note:** This field is required when you are defining a characteristic for retention type enrollment based pricing rule for a bill group using a pricing group.
Characteristic Value	Used to specify the value for the characteristic type. **Note:** If you select a predefined characteristic type, the **Search** (🔍) icon appears corresponding to the **Characteristic Value** field. On clicking the **Search** icon, the **Predefined Characteristic Search** window appears. On specifying the value for a predefined characteristic type, the description of the characteristic value appears corresponding to the **Characteristic Value** field.	Yes (Conditional) **Note:** This field is required when you are defining a characteristic for retention type enrollment based pricing rule for a bill group using a pricing group.

2. Enter the required details in the **Characteristics** section.
3. If you want to define more than one characteristic, click the **Add** (+) icon and then repeat step 2.

Note: However, if you want to remove a characteristic, click the **Delete** (🗑) icon corresponding to the characteristic.

4. Click **Save**.
   The characteristics are defined for the retention type enrollment based pricing rule for a bill group using a pricing group.

Related Topics

For more information on...	See...
How to define a retention type enrollment based pricing rule for a bill group using a pricing group.	Defining a Retention Type Enrollment Based Pricing Rule for a Bill Group Using a Pricing Group on page 3120

Viewing a Retention Type Enrollment Based Pricing Rule of a Parent Customer

Procedure

To view a retention type enrollment based pricing rule for a parent customer:

1. Search for a parent customer whose pricing details you want to view in the **Customer 360° View** screen.
2. In the **Search Results** section, click the **View** (🔗) icon corresponding to the parent customer *w*hose pricing details you want to view.
   The **Person** tab appears in the **Customer 360° Information** screen.
3. Click the **Pricing** tab.
   The **Pricing** tab appears.

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4. In the **Parent Customer Pricing Rules** zone, click the link in the **Pricing Rule Information** column corresponding *t*o the pricing rule type whose details you want to view.

   The **Pricing Rule** screen appears. It contains the following zone:

   - **Retention Type Enrollment Based** - Displays Retention Type Enrollment Based Pricing Rule of a Parent. It contains the following sections:
     - **Main** - Displays the basic details of the retention type enrollment based pricing rule of a parent customer.
     - **Price Item Parameters** - Displays the price item parameters defined for the retention type enrollment based pricing rule of a parent customer.
     - **Characteristics** - Displays the characteristics defined for the retention type enrollment based pricing rule of a parent customer.
5. View the basic details of a retention type enrollment based pricing rule of a parent customer in the **Main** section.
6. View the price item parameters of a retention type enrollment based pricing rule of a parent customer in the **Price Item Parameters** section.
7. View the characteristics of a retention type enrollment based pricing rule of a parent customer in the **Characteristics** section.

Related Topics

For more information on...	See...
Customer 360° Information - Pricing tab	Customer 360° Information - Pricing Information on page 641

Viewing a Retention Type Enrollment Based Pricing Rule of a Bill Group

Procedure

To view a retention type enrollment based pricing rule of a bill group:

1. Search for a bill group in the **Customer 360° View** screen.
2. In the **Search Results** section, click the **View** (🔗) icon corresponding to the bill group *w*hose pricing details you want to view.
   The **Person** tab appears in the **Customer 360° Information** screen.
3. Click the **Pricing** tab.
   The **Pricing** tab appears.
4. Click the **Broadcast** (📡) icon in the **Bill Group ASO Policy Information** zone, corresponding to the **Bill Group Information** column, whose bill group details you want to view.
   The **Bill Group ASO Policy Pricing Rules** zone appears.
5. In the **Bill Group ASO Policy Pricing Rules** zone, click the link in the **Pricing Rule Information** column corresponding to the pricing rule type whose details you want to view.

   The **Pricing Rule** screen appears. It contains the following zone:

   - **Retention Type Enrollment Based** - Displays Retention Type Enrollment Based Pricing Rule of a Bill Group. It contains the following sections:
     - **Main** - Displays the basic details of the retention type enrollment based pricing rule of a bill group.
     - **Price Item Parameters** - Displays the price item parameters defined for the retention type enrollment based pricing rule of a bill group.
     - **Characteristics** - Displays the characteristics defined for the retention type enrollment based pricing rule of a bill group.
6. View the basic details of a retention type enrollment based pricing rule of a bill group in the **Main** section.
7. View the price item parameters of a retention type enrollment based pricing rule of a bill group in the **Price Item Parameters** section.

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8. View the characteristics of a retention type enrollment based pricing rule of a bill group in the **Characteristics** section.

Related Topics

For more information on...	See...
Customer 360° Information - Pricing tab	Customer 360° Information - Pricing Information on page 641

Flat Fee Pricing

The Administrative Services Only (ASO) provider would like to charge one-time or recurring flat fee to the self-funded employer. Oracle Revenue Management and Billing enables you to process and bill such one-time and recurring charges to the bill group. The system enables you to define one-time or recurring flat fee for a price item. You can define recurring flat fee based on bill period or frequency. The one-time flat fee, bill period based recurring flat fee, and frequency based recurring flat fee can be defined using the respective flat fee pricing rules. You can only define one-time flat fee, bill period based recurring flat fee, and frequency based recurring flat fee pricing rules for a bill group.

You can define the flat fee pricing rules for bill groups from the **Customer 360° Information** screen. You can define a one-time flat fee, bill period based recurring flat fee, and frequency based recurring flat fee pricing rule using the respective flat fee pricing rule type. It is the flat fee pricing rule type which helps the system to determine:

- Business object using which the flat fee pricing rule should be created in the system.

  Note: You must not select the **Primary** option while defining a one-time flat fee, bill period based recurring flat fee, and frequency based recurring flat fee pricing rule type.

- Price items for which you can define the flat fee pricing rules.
- Rate options that you can use while defining the pricing for the price item.
- Different type of account to which a price item should be billed based on the specified priority.
- Rule type which indicates the rules that should be executed to determine whether the price item is eligible for billing.
- Additional flat fee specific data, such as:
  - Bill segment cancel reason which you want to use when the one-time or recurring flat fee bill segment is canceled due to change in the flat fee amount.
  - Whether the pricing rule type is defined for one-time flat fee or recurring flat fee.
  - Recurring method which indicates that the system should create recurring flat fee charge based on bill period or frequency. This information is required when you are defining a recurring flat fee pricing rule type.
  - Bill period that you can use while defining a bill period based recurring flat fee pricing rule. This information is required when you are defining a bill period based recurring flat fee pricing rule type.

Once a one-time flat fee pricing rule type is defined, you can define one-time flat fee pricing rules using the one-time flat fee pricing rule type. While defining a one-time flat fee pricing rule for a bill group, you need to specify the following:

- The policy status in which the one-time flat fee pricing rule is applicable. Note that you cannot define a one-time flat fee pricing rule for the post runout period of the policy.
- Price item for which you want to create the one-time flat fee billable charge.
- Date which you want to specify as the start and end dates in the one-time flat fee billable charge.
- Billable charge line type using which you want to create the one-time flat fee billable charge.
- Bill after date which you want to stamp on the one-time flat fee billable charge.
- Flat fee amount for which you want to create the one-time flat fee billable charge.
- Override account when you want to create the one-time flat fee billable charge on a particular account. If you do not specify the bill to override account, the system will derive the account using the priority defined for the price item in the one-time flat fee pricing rule type.

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Once a bill period based recurring flat fee pricing rule type is defined, you can define bill period based recurring flat fee pricing rules using the bill period based recurring flat fee pricing rule type. While defining a bill period based recurring flat fee pricing rule for a bill group, you need to specify the following:

- The policy status in which the bill period based recurring flat fee pricing rule is applicable. Note that you cannot define a bill period based recurring flat fee pricing rule for the post runout period of the policy.
- Price item for which you want to create the bill period based recurring flat fee billable charge.
- Dates which you want to specify as the start and end dates in the bill period based recurring flat fee billable charge.
- Billable charge line type using which you want to create the bill period based recurring flat fee billable charge.
- Bill period using which the recurring bill segments should be created in the system.
- Flat fee amount for which you want to create the bill period based recurring flat fee billable charge.
- Override account when you want to create the bill period based recurring flat fee billable charge on a particular account. If you do not specify the bill to override account, the system will derive the account using the priority defined for the price item in the bill period based recurring flat fee pricing rule type.

Once a frequency based recurring flat fee pricing rule type is defined, you can define frequency based recurring flat fee pricing rules using the frequency based recurring flat fee pricing rule type. While defining a frequency based recurring flat fee pricing rule for a bill group, you need to specify the following:

- The policy status in which the frequency based recurring flat fee pricing rule is applicable. Note that you cannot define a frequency based recurring flat fee pricing rule for the post runout period of the policy.
- Price item for which you want to create the frequency based recurring flat fee billable charge.
- Dates which you want to specify as the start and end dates in the frequency based recurring flat fee billable charge.
- Billable charge line type using which you want to create the frequency based recurring flat fee billable charge.
- Frequency using which the recurring bill segments should be created in the system.
- Flat fee amount for which you want to create the frequency based recurring flat fee billable charge.
- Override account when you want to create the frequency based recurring flat fee billable charge on a particular account. If you do not specify the bill to override account, the system will derive the account using the priority defined for the price item in the frequency based recurring flat fee pricing rule type.

Once a one-time flat fee, bill period based recurring flat fee, or frequency based recurring flat fee pricing rule is defined for a bill group, the system creates the one-time or recurring flat fee billable charge, respectively. The system does not create any price assignment, price list, or price list assignment in case of flat fee pricing.

Defining a One-Time Flat Fee Pricing Rule Type

Prerequisites

To define a one-time flat fee pricing rule type, you should have:

- Business Object **C1-PricingRuleTypeFlatFees** defined for pricing rule type.
- Business Object **C1-PricingRuleFlatFees** defined for pricing rule.
- Pricing rule type category for flat fees defined in the application.

Procedure

To define a one-time flat fee pricing rule type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **P** and then click **Pricing Rule Type**.
   A sub-menu appears.
3. Click the **Add** option from the **Pricing Rule Type** sub-menu.

   The **Select Business Object** screen appears. It contains the following field:

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Field Name	Field Description	Mandatory (Yes or No)
Pricing Rule Type Business Object	Used to indicate the business object using which you want to create the pricing rule type. **Note:** You can create a one-time flat fee pricing rule type using the **Flat Fee Pricing Rule Type** business object.	Yes

Tip: Alternatively, you can access this screen by clicking the **Add** button in the **Page Title** area of the **Pricing Rule Type** screen.

4. Select the **Flat Fee Pricing Rule Type** business object.
5. Click **OK**.

The **Flat Fee Pricing Rule Type** screen appears. It contains the following sections:

- **Main** - Used to specify basic details about the flat fee pricing rule type.
- **Related Pricing Rule Types** - Used to define the pricing rule types which are related to the parent pricing rule type.
- **Transaction Field Mapping** - Used to specify the transaction related data mapped to the pricing rule type
- **Algorithms** - Used to define the algorithms used for the pricing rule type.
- **Additional Data** - Used to specify the additional information about the pricing rule type.
- **Price Items** - Used to define the price items assigned to the pricing rule type.
- **Price Item Parameters** - Used to define the price item parameters in the pricing rule type.
- **Characteristics** - Used to define the characteristics for the pricing rule type.
- **Billable Charge Line Types** - Used to define the pricing rule type for billable charge line type.
- **Flat Fees - Specific Additional Data** - Used to specify the flat fees specific for additional data.

The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Pricing Rule Type	Used to specify the pricing rule type.	Yes
Description	Used to specify the description for the pricing rule type.	Yes
Detailed Description	Used to specify additional information about the pricing rule type.	No
Pricing Rule Business Object	Used to indicate the pricing rule business object. The valid values are: • Claim Pricing Rule • Aggregate Stop-Loss (ASL) Pricing Rule • Specific Stop-Loss (SSL) Pricing Rule • Retention Type Claim Based Pricing Rule • Retention Type Enrollment Based Pricing Rule • Flat Fee Pricing Rule	Yes
Business Object	Indicates the pricing rule type business object for flat fees.	Not applicable
Status	Used to indicate the status of the pricing rule type. The valid values are: • Active	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	• Inactive	
Primary	Used to select the checkbox if the pricing rule type is primary. **Note:** This field is not enabled for selection if the **Pricing Rule Type Category** is **Flat Fees**.	No
Pricing Rule Type Category	Used to indicate the pricing rule type category for the pricing rule type. The valid values are: • Claim • Aggregate Stop-Loss • Specific Stop-Loss • Retention Type Claim Based • Retention Type Enrollment Based • Flat Fees	Yes

6. Enter the required details in the **Main** section.
7. Add the related pricing rule types in the primary pricing rule type, if required.

> **Note:**
>
> **Related Pricing Rule Types** section appears when the pricing rule type is primary.
>
> This section does not appear when the **Pricing Rule Type Category** is **Flat Fees**.

8. Define the transaction field mapping in the primary pricing rule type, if required.

> **Note:**
>
> **Transaction Field Mapping** section appears when the pricing rule type is primary.
>
> This section does not appear when the **Pricing Rule Type Category** is **Flat Fees**.

9. Associate algorithms with the pricing rule type, if required.
10. Define additional data for the pricing rule type, if required.

> **Note:** This section does not appear when the **Pricing Rule Type Category** is **Flat Fees**.

11. Add pricing items in the pricing rule type, if required.
12. Add price item parameters in the pricing rule type, if required.
13. Define characteristics for the pricing rule type, if required.
14. Define billable charge line types in the flat fees pricing rule type, if required.
15. Add the flat fees - specific additional data in the pricing rule type, if required.

> **Note:** This section appears when the **Business Object** is **Flat Fees Pricing Rule Type**.

16. Click **Save**.
    The one-time flat fee pricing rule type is defined.

Related Topics

For more information on...	See...
Pricing Rule Type screen	Pricing Rule Type on page 2942

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For more information on...	See...
How to add the related pricing rule types in the primary pricing rule type	Adding Related Pricing Rule Types in a Primary Pricing Rule Type on page 2959
How to define the transaction field mapping in the primary pricing rule type	Defining Transaction Field Mapping in a Primary Pricing Rule Type on page 2961
How to associate algorithms with the pricing rule type	Associating Algorithms with a Pricing Rule Type on page 2967
How to define additional data for the pricing rule type	Defining Additional Data for a Pricing Rule Type on page 2969
How to add pricing items in the pricing rule type	Adding Price Items in a Pricing Rule Type on page 2971
How to add price item parameters in the pricing rule type	Adding a Price Item Parameter in a Pricing Rule Type on page 2973
How to define a characteristic for the pricing rule type	Defining a Characteristic for a Pricing Rule Type on page 2975
How to add the one-time flat fee specific additional data in the pricing rule type	Adding the One-Time Flat Fee Specific Data in a Pricing Rule Type on page 3129

Adding the One-Time Flat Fee Specific Data in a Pricing Rule Type

Procedure

To add the one-time flat fee specific data in a pricing rule type:

1. Ensure that the **Flat Fees - Specific Additional Data** section is expanded when you are defining or editing a pricing rule type.

   The **Flat Fees - Specific Additional Data** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Bill Segment Cancel Reason	Used to indicate the bill segment cancel reason.	No
Recurring Fee	Used to specify whether the recurring flat fee or one-time flat fee is required. **Note:** This field cannot be edited.	No
Recurring Method	Used to indicate whether recurring bill segments must be created at the intervals defined in the bill period or at the set invoice frequency. The valid values are: • Bill Period • Frequency	Yes (Conditional) **Note:** This field is required when you are specifying whether the recurring flat fee is based on bill period or frequency.

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Field Name	Field Description	Mandatory (Yes or No)
	Note: This field appears when you select the checkbox for **Recurring Fee** field. This field cannot be edited.	

2. Enter the required details in the **Flat Fees - Specific Additional Data** section.
3. Click **Save**.
   The Flat Fees - Specific Additional data is added in the pricing rule type.

Related Topics

For more information on...	See...
How to define a one-time flat fee pricing rule type	Defining a One-Time Flat Fee Pricing Rule Type on page 3126
How to edit a one-time flat fee pricing rule type	Editing a One-Time Flat Fee Pricing Rule Type on page 3130

Editing a One-Time Flat Fee Pricing Rule Type

Prerequisites

To edit a one-time flat fee pricing rule type, you should have:

- Business Object **C1-PricingRuleFlatFees** defined for pricing rule.
- Pricing rule type category for flat fees defined in the application.

Procedure

To edit a one-time flat fee pricing rule type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **P** and then click **Pricing Rule Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Pricing Rule Type** sub-menu.
   The **Pricing Rule Type** screen appears.
4. In the **Pricing Rule Type List** zone, click the **Edit** (✎) icon in the **Edit** column corresponding to the *P*ricing rule type whose details you want to edit.

   The **Pricing Rule Type** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details about the flat fee pricing rule type.
   - **Related Pricing Rule Types** - Used to define the pricing rule types which are related to the parent pricing rule type.
   - **Transaction Field Mapping** - Used to specify the transaction related data mapped to the pricing rule type
   - **Algorithms** - Used to define the algorithms used for the pricing rule type.
   - **Additional Data** - Used to specify the additional information about the pricing rule type.
   - **Price Items** - Used to define the price items assigned to the pricing rule type.
   - **Price Item Parameters** - Used to define the price item parameters in the pricing rule type.
   - **Characteristics** - Used to define the characteristics for the pricing rule type.
   - **Billable Charge Line Types** - Used to define the pricing rule type for billable charge line type.

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- **Flat Fees - Specific Additional Data** - Used to specify the flat fees specific for additional data.

The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Pricing Rule Type	Displays the pricing rule type.	Not applicable
Description	Used to specify the description for the pricing rule type.	Yes
Detailed Description	Used to specify additional information about the pricing rule type.	No
Pricing Rule Business Object	Used to indicate the pricing rule business object. The valid values are: • Claim Pricing Rule • Aggregate Stop-Loss (ASL) Pricing Rule • Specific Stop-Loss (SSL) Pricing Rule • Retention Type Claim Based Pricing Rule • Retention Type Enrollment Based Pricing Rule • Flat Fee Pricing Rule	Yes
Business Object	Indicates the pricing rule type business object for flat fees.	Not applicable
Status	Used to indicate the status of the pricing rule type. The valid values are: • Active • Inactive	Yes
Primary	Used to select the checkbox if the pricing rule type is primary. **Note:** This field is not enabled for selection if the **Pricing Rule Type Category** is **Flat Fees**.	No
Pricing Rule Type Category	Used to indicate the pricing rule type category for the pricing rule type. The valid values are: • Claim • Aggregate Stop-Loss • Specific Stop-Loss • Retention Type Claim Based • Retention Type Enrollment Based • Flat Fees	Yes

Tip: Alternatively, you can edit the details of a one-time flat fees pricing rule type by clicking the **Edit** button in the **Pricing Rule Type** zone.

5. Modify the required details in the **Main** section.
6. Define, edit or remove related pricing rule types from the primary pricing rule type, if required.

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> **Note:**
>
> **Related Pricing Rule Types** section appears when the pricing rule type is primary.
>
> This section does not appear when the **Pricing Rule Type Category** is **Flat Fees**.

7. Modify the details of transaction field mapping, if required.

> **Note:**
>
> **Transaction Field Mapping** section appears when the pricing rule type is primary.
>
> This section does not appear when the **Pricing Rule Type Category** is **Flat Fees**.

8. Define, edit or remove algorithms from the pricing rule type, if required.
9. Modify additional data for the pricing rule type, if required.

> **Note:** This section does not appear when the **Pricing Rule Type Category** is **Flat Fees**.

10. Define, edit or remove price items from the pricing rule type, if required.
11. Define, edit or remove price items from the pricing rule type, if required.
12. Define, edit, or remove characteristics of the pricing rule type, if required.
13. Define, edit or remove billable charge line types for the flat fees pricing rule type, if required.
14. Modify flat fees - specific additional data in the pricing rule type, if required.

> **Note:** This section appears when the **Business Object** is **Flat Fees Pricing Rule Type**.

15. Click **Save**.
    The changes made to the one-time flat fees pricing rule type are saved.

Related Topics

For more information on...	See...
Pricing Rule Type screen	Pricing Rule Type on page 2942
Pricing Rule Type List zone	Pricing Rule Type List on page 2943
Pricing Rule Type zone	Pricing Rule Type on page 2946
How to add the related pricing rule types in the primary pricing rule type	Adding Related Pricing Rule Types in a Primary Pricing Rule Type on page 2959
How to define the transaction field mapping in the primary pricing rule type	Defining Transaction Field Mapping in a Primary Pricing Rule Type on page 2961
How to associate algorithms with the pricing rule type	Associating Algorithms with a Pricing Rule Type on page 2967
How to define additional data for the pricing rule type	Defining Additional Data for a Pricing Rule Type on page 2969
How to add pricing items in the pricing rule type	Adding Price Items in a Pricing Rule Type on page 2971
How to add price item parameters in the pricing rule type	Adding a Price Item Parameter in a Pricing Rule Type on page 2973
How to define a characteristic for the pricing rule type	Defining a Characteristic for a Pricing Rule Type on page 2975
How to add the one-time flat fee specific additional data in the pricing rule type	Adding the One-Time Flat Fee Specific Data in a Pricing Rule Type on page 3129

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Deleting a One-Time Flat Fee Pricing Rule Type

Procedure

To delete a one-time flat fee pricing rule type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **P** and then click **Pricing Rule Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Pricing Rule Type** sub-menu.
   The **Pricing Rule Type** screen appears.
4. In the **Pricing Rule Type List** zone, click the **Delete** (🗑) icon in the **Delete** column corresponding *t*o the one-time flat fee pricing rule type that you want to delete.
   A message appears confirming whether you want to delete the one-time flat fee pricing rule type.

   Note: You can delete a one-time flat fee pricing rule type when it is not yet used in the system.

   Tip: Alternatively, you can delete a one-time flat fee pricing rule type by clicking the **Delete** button in the **Pricing Rule Type** zone.
5. Click **OK**.
   The one-time flat fee pricing rule type is deleted.

Related Topics

For more information on...	See...
Pricing Rule Type screen	Pricing Rule Type on page 2942
Pricing Rule Type List zone	Pricing Rule Type List on page 2943
Pricing Rule Type zone	Pricing Rule Type on page 2946

Viewing the One-Time Flat Fee Pricing Rule Type Details

Procedure

To view the details of a one-time flat fee pricing rule type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **P** and then click **Pricing Rule Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Pricing Rule Type** sub-menu.
   The **Pricing Rule Type** screen appears.
4. In the **Pricing Rule Type List** zone, click the **Broadcast** (📡) icon corresponding *t*o the one-time flat fee pricing rule type whose details you want to view.
   The **Pricing Rule Type** zone appears.
5. View the details of the one-time flat fee pricing rule type in the **Pricing Rule Type** zone.

Related Topics

For more information on...	See...
Pricing Rule Type screen	Pricing Rule Type on page 2942

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For more information on...	See...
Pricing Rule Type List zone	Pricing Rule Type List on page 2943
Pricing Rule Type zone	Pricing Rule Type on page 2946

Defining a One-Time Flat Fee Pricing Rule for a Bill Group

Prerequisites

To define a one-time flat fee pricing rule for a bill group, you should have:

- Business Object **C1-PricingRule** defined for pricing rule.
- Business Object **C1-PricingRuleFlatFees** defined for one-time flat fee pricing rule.
- Pricing rule type defined in the application.
- Policy status defined in the application.
- Price item defined in the application.
- Billable Charge Line Type defined in the application.

Procedure

To define a one-time flat fee pricing rule for a bill group:

1. Search for the account, person, or policy whose pricing details you want to view in the **Customer 360° View** screen.
2. In the **Search Results** section, click the **View** (🔗) icon corresponding to the account, person, or policy whose pricing details you want to view.
   The **Account**, **Person**, or **Policy** tab in the **Customer 360° Information** screen appears.
3. Click the **Pricing** tab and then click the **Add** link in the upper right corner of the **Bill Group ASO Policy Pricing Rules** zone.

   The **Pricing Rule** screen appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Person Name	Displays the person name.	Not applicable
Person Type	Displays the person type.	Not applicable
Pricing Rule Type	Used to indicate the pricing rule type to create the pricing rule. **Note:** You can create a one-time flat fee pricing rule using the **Pricing Rule Type** for flat fees.	Yes
Policy Status	Used to indicate the policy status for pricing rule. The valid values are: • In Force/Active • Runout	Yes

4. Click **OK**.

   The **Flat Fee Pricing Rule** screen appears. It contains the following sections:

   - **Customer Information** - Displays the customer information for bill group.
   - **Main** - Used to specify basic details about the one-time flat fee pricing rule.
   - **Characteristics** - Used to define the characteristics for the one-time flat fee pricing rule.

   The **Customer Information** section contains the following fields:

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Field Name	Field Description	Mandatory (Yes or No)
Bill Group Information	Displays the bill group information.	Not applicable
Policy Start Date	Displays the policy start date.	Not applicable
Policy End Date	Displays the policy end date.	Not applicable
Policy Status	Indicates the policy status for pricing rule. The valid values are: • In Force/Active • Runout	Not applicable
Pricing Rule Type	Indicates the pricing rule type.	Not applicable

The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Price Item	Used to indicate the price item.	Yes
Charge Date	Used to specify the flat fee charge date. **Note:** By default this field displays the policy start date or policy runout start date.	Yes
Billable Charge Line Type	Used to specify the billable charge line type. **Note:** On clicking the **Search** (🔍) icon, the **Billable Charge Line Type Search** window appears. On specifying the billable charge line type, the description of the billable charge line type appears corresponding to the **Billable Charge Line Type** field.	No
Bill After Date	Used to specify the bills after the specific date.	No
Fee	Used to specify the amount of flat fee. **Note:** This field appears when you select the billable charge line type in the **Billable Charge Line Type** field.	Yes
Bill To Account Override	Used to specify the account to which the bill is override. **Note:** On clicking the **Search** (🔍) icon, the **Account Search** window appears. On specifying the account, the description of the account appears corresponding to the **Bill To Account Override** field.	Yes

5. Enter the required details in the **Main** section.

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6. Define characteristics for a one-time flat fee pricing rule, if required.
7. Click **Save**.
   The one-time flat fee pricing rule for a bill group is defined.

> **Note:** A billable charge is created and assigned to the one-time flat fee pricing rule.

Related Topics

For more information on...	See...
Customer 360° Information - Pricing tab	Customer 360° Information - Pricing Information on page 641
Bill Group ASO Policy Pricing Rules zone	Bill Group Self-Funded Policy Pricing Rules on page 649
How to define a characteristic for a one-time flat fee pricing rule	Defining a Characteristic for a One-Time Flat Fee Pricing Rule on page 3136

Defining a Characteristic for a One-Time Flat Fee Pricing Rule

Prerequisites

To define a characteristic for a one-time flat fee pricing rule, you should have:

- Characteristic types defined in the application (where the characteristic entity is set to **Pricing Rule**)

Procedure

To define a characteristic for a one-time flat fee pricing rule:

1. Ensure that the **Characteristics** section is expanded when you are defining or editing a pricing rule.

   The **Characteristics** section contains the following columns in a grid:

Column Name	Column Description	Mandatory (Yes or No)
Effective Date	Used to specify the date from when the characteristic is effective for the one-time flat fee pricing rule.	Yes (Conditional) **Note:** This field is required when you are defining a characteristic for the one-time flat fee pricing rule.
Characteristic Type	Used to indicate the characteristic type. **Note:** The list includes only those characteristic types where the characteristic entity is set to **Pricing Rule**.	Yes (Conditional) **Note:** This field is required when you are defining a characteristic for the one-time flat fee pricing rule.
Characteristic Value	Used to specify the value for the characteristic type.	Yes (Conditional)

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Column Name	Column Description	Mandatory (Yes or No)
	Note: If you select a predefined characteristic type, the **Search** (🔍) icon appears corresponding to the **Characteristic Value** field. On clicking the **Search** icon, the **Predefined Characteristic Search** window appears. On specifying the value for a predefined characteristic type, the description of the characteristic value appears corresponding to the **Characteristic Value** field.	**Note:** This field is required when you are defining a characteristic for the one-time flat fee pricing rule.

2. Enter the required details in the **Characteristics** section.
3. If you want to define more than one characteristic for the one-time flat fee pricing rule, click the **Add** (+) icon and then repeat step 2.

Note: However, if you want to remove a characteristic from the one-time flat fee pricing rule, click the **Delete** (🗑) icon corresponding to the characteristic.

4. Click **Save**.
   The characteristics are defined for the one-time flat fee pricing rule.

Related Topics

For more information on...	See...
How to define a one-time flat fee pricing rule for a bill group	Defining a One-Time Flat Fee Pricing Rule for a Bill Group on page 3134
How to edit the one-time flat fee pricing rule for a bill group	Editing a One-Time Flat Fee Pricing Rule of a Bill Group on page 3137

Editing a One-Time Flat Fee Pricing Rule of a Bill Group

Prerequisites

To edit a one-time flat fee pricing rule of a bill group, you should have:

- Business Object **C1-PricingRuleFlatFees** defined for one-time flat fee pricing rule.

Procedure

To edit a one-time flat fee pricing rule of a bill group:

1. Search for the account, person, or policy whose pricing details you want to view in the **Customer 360° View** screen.
2. In the **Search Results** section, click the **View** (🔗) icon corresponding to the account, person, or policy whose pricing details you want to view.
   The **Account**, **Person**, or **Policy** tab in the **Customer 360° Information** screen appears.
3. Click the **Pricing** tab, in the **Bill Group ASO Policy Pricing Rules** zone click the **Edit** (✎) icon in the **Edit** column corresponding to the pricing rule type for one-time flat fee whose one-time flat fee pricing rule details you want to edit.

   The **Flat Fee Pricing Rule** screen appears. It contains the following sections:

   - **Customer Information** - Displays the customer information for bill group.
   - **Main** - Displays the basic details of the one-time flat fee pricing rule.

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- **Characteristics** - Used to define the characteristics for the one-time flat fee pricing rule.

The **Customer Information** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Bill Group Information	Displays the bill group information.	Not applicable
Policy Start Date	Displays the policy start date.	Not applicable
Policy End Date	Displays the policy end date.	Not applicable
Policy Status	Indicates the policy status for pricing rule. The valid values are: • In Force/Active • Runout	Not applicable
Pricing Rule Type	Indicates the pricing rule type.	Not applicable

The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Price Item	Indicates the price item.	Not applicable
Charge Date	Used to specify the flat fee charge date.	Yes
Billable Charge Line Type	Displays the billable charge line type.	Not applicable
Bill After Date	Displays the bills after the specific date.	Not applicable
Fee	Used to specify the amount of flat fee. **Note:** This field appears when you have added the billable charge line type in the **Billable Charge Line Type** field.	Yes
Bill To Account Override	Displays the account to which the bill is override.	Not applicable
Billable Charge Information	Displays the billable charge information.	Not applicable

4. Modify the basic details of the one-time flat fee pricing rule, if required.
5. Add, edit, or remove characteristics for a one-time flat fee pricing rule, if required.
6. Click **Save**.

Note: If **Fee** or **Charge Date** is modified then it checks whether bill segment is created, and if it is created then,

- If it is in frozen or pending cancelled status then,
  - Bill segment and billable charge is cancelled and new billable charge is created.
- If it is in any other status other than cancelled then,
  - Bill segment is deleted and existing billable charge billable charge is updated.

Charge Date is set to billable charge start date and end date.

When characteristics are updated, billable charge is updated with those characteristics.

The changes made to a one-time flat fee pricing rule for a bill group are saved.

Related Topics

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For more information on...	See...
Customer 360° Information - Pricing tab	Customer 360° Information - Pricing Information on page 641
Bill Group ASO Policy Pricing Rules zone	Bill Group Self-Funded Policy Pricing Rules on page 649
How to define a characteristic for a one-time flat fee pricing rule	Defining a Characteristic for a One-Time Flat Fee Pricing Rule on page 3136

Viewing a One-Time Flat Fee Pricing Rule of a Bill Group

Procedure

To view a one-time flat fee pricing rule of a bill group:

1. Search for the account, person, or policy whose pricing details you want to view in the **Customer 360° View** screen.
2. In the **Search Results** section, click the **View** (🔗) icon corresponding to the account, person, or policy *w*hose pricing details you want to view.
   The **Account**, **Person**, or **Policy** tab in the **Customer 360° Information** screen appears.
3. Click the **Pricing** tab.
4. In the **Bill Group ASO Policy Information** zone, click the **Broadcast** (📡) icon corresponding to the bill group whose one-time flat fee pricing rule bill group details you want to view.
5. In the **Bill Group ASO Policy Pricing Rules** zone, click the link in the **Pricing Rule Information** column corresponding to the one-time flat fee pricing rule type whose one-time flat fee pricing rule bill group you want to view.
   The **Pricing Rule** screen appears. It contains the following zone:
   - **Flat Fee** - Displays the pricing rule one-time flat fee details for a bill group. It contains the following sections:
     - **Main** - Displays the basic details of the one-time flat fee pricing rule.
     - **Characteristics** - Displays the characteristics defined for the one-time flat fee pricing rule.
6. View the basic details of one-time flat fee pricing rule in the **Main** section.
7. View the characteristics of the one-time flat fee pricing rule in the **Characteristics** section.

Related Topics

For more information on...	See...
Customer 360° Information - Pricing tab	Customer 360° Information - Pricing Information on page 641
Bill Group ASO Policy Pricing Rules zone	Bill Group Self-Funded Policy Pricing Rules on page 649
Pricing Rule screen	Pricing Rule (Used for Viewing) on page 689
Flat Fee zone	Flat Fee on page 706

Deleting a One-Time Flat Fee Pricing Rule of a Bill Group

Procedure

To delete a one-time flat fee pricing rule of a bill group:

1. Search for the account, person, or policy whose pricing details you want to view in the **Customer 360° View** screen.
2. In the **Search Results** section, click the **View** (🔗) icon corresponding to the account, person, or policy *w*hose pricing details you want to view.
   The **Account**, **Person**, or **Policy** tab in the **Customer 360° Information** screen appears.

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3. Click the **Pricing** tab, in the **Bill Group ASO Policy Pricing Rules** zone, click the **Delete** (🗑) icon in the **Delete** column corresponding to the one-time flat fee pricing rule type whose one-time flat fee pricing rule you want to delete.
   A message appears confirming whether you want to delete the one-time flat fee pricing rule.
4. Click **OK**.

Note:
If flat fees is not linked to billable charge whose bill segment is in frozen or pending cancelled status then the pricing rule is not deleted.
If bill segment is either not created or is in any other status other than cancelled then delete bill segment, billable charge and pricing rule.
If bill segment is cancelled then billable charge is cancelled and pricing rule is deleted.

The one-time flat fee pricing rule is deleted.

Related Topics

For more information on...	See...
Customer 360° Information - Pricing tab	Customer 360° Information - Pricing Information on page 641
Bill Group ASO Policy Pricing Rules zone	Bill Group Self-Funded Policy Pricing Rules on page 649

Defining a Bill Period Based Recurring Flat Fee Pricing Rule Type

Prerequisites

To define a bill period based recurring flat fee pricing rule type, you should have:

- Business Object **C1-PricingRuleTypeFlatFees** defined for pricing rule type.
- Business Object **C1-PricingRuleFlatFees** defined for pricing rule.
- Pricing rule type category for flat fees defined in the application.

Procedure

To define a bill period based recurring flat fee pricing rule type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **P** and then click **Pricing Rule Type**.
   A sub-menu appears.
3. Click the **Add** option from the **Pricing Rule Type** sub-menu.

   The **Select Business Object** screen appears. It contains the following field:

Field Name	Field Description	Mandatory (Yes or No)
Pricing Rule Type Business Object	Used to indicate the business object using which you want to create the pricing rule type. **Note:** You can create a bill period based recurring flat fee pricing rule type using the **Flat Fee Pricing Rule Type** business object.	Yes

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> **Tip:** Alternatively, you can access this screen by clicking the **Add** button in the **Page Title** area of the **Pricing Rule Type** screen.

4. Select the **Flat Fee Pricing Rule Type** business object.
5. Click **OK**.

The **Flat Fee Pricing Rule Type** screen appears. It contains the following sections:

- **Main** - Used to specify basic details about the flat fee pricing rule type.
- **Related Pricing Rule Types** - Used to define the pricing rule types which are related to the parent pricing rule type.
- **Transaction Field Mapping** - Used to specify the transaction related data mapped to the pricing rule type
- **Algorithms** - Used to define the algorithms used for the pricing rule type.
- **Additional Data** - Used to specify the additional information about the pricing rule type.
- **Price Items** - Used to define the price items assigned to the pricing rule type.
- **Price Item Parameters** - Used to define the price item parameters in the pricing rule type.
- **Characteristics** - Used to define the characteristics for the pricing rule type.
- **Billable Charge Line Types** - Used to define the pricing rule type for billable charge line type.
- **Flat Fees - Specific Additional Data** - Used to specify the flat fees specific for additional data.
  - **Bill Periods** - Used to specify the bill periods for specifying intervals for creating recurring bill segments.

The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Pricing Rule Type	Used to specify the pricing rule type.	Yes
Description	Used to specify the description for the pricing rule type.	Yes
Detailed Description	Used to specify additional information about the pricing rule type.	No
Pricing Rule Business Object	Used to indicate the pricing rule business object. The valid values are: • Claim Pricing Rule • Aggregate Stop-Loss (ASL) Pricing Rule • Specific Stop-Loss (SSL) Pricing Rule • Retention Type Claim Based Pricing Rule • Retention Type Enrollment Based Pricing Rule • Flat Fee Pricing Rule	Yes
Business Object	Indicates the pricing rule type business object for flat fees.	Not applicable
Status	Used to indicate the status of the pricing rule type. The valid values are: • Active • Inactive	Yes
Primary	Used to select the checkbox if the pricing rule type is primary. **Note:** This field is not enabled for selection if the **Pricing Rule Type Category** is **Flat Fees**.	No

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Field Name	Field Description	Mandatory (Yes or No)
Pricing Rule Type Category	Used to indicate the pricing rule type category for the pricing rule type. The valid values are: • Claim • Aggregate Stop-Loss • Specific Stop-Loss • Retention Type Claim Based • Retention Type Enrollment Based • Flat Fees	Yes

6. Enter the required details in the **Main** section.
7. Add the related pricing rule types in the primary pricing rule type, if required.

> **Note:**
>
> **Related Pricing Rule Types** section appears when the pricing rule type is primary.
>
> This section does not appear when the **Pricing Rule Type Category** is **Flat Fees**.

8. Define the transaction field mapping in the primary pricing rule type, if required.

> **Note:**
>
> **Transaction Field Mapping** section appears when the pricing rule type is primary.
>
> This section does not appear when the **Pricing Rule Type Category** is **Flat Fees**.

9. Associate algorithms with the pricing rule type, if required.
10. Define additional data for the pricing rule type, if required.

> **Note:** This section does not appear when the **Pricing Rule Type Category** is **Flat Fees**.

11. Add pricing items in the pricing rule type, if required.
12. Add price item parameters in the pricing rule type, if required.
13. Define characteristics for the pricing rule type, if required.
14. Define billable charge line types in the flat fees pricing rule type, if required.
15. Add the flat fees - specific additional data in the pricing rule type, if required.

> **Note:**
>
> This section appears when the **Business Object** is **Flat Fees Pricing Rule Type**.
>
> Add the bill periods in the pricing rule type, if required.

16. Click **Save**.
    The bill period based recurring flat fee pricing rule type is defined.

Related Topics

For more information on...	See...
Pricing Rule Type screen	Pricing Rule Type on page 2942
How to add the related pricing rule types in the primary pricing rule type	Adding Related Pricing Rule Types in a Primary Pricing Rule Type on page 2959
How to define the transaction field mapping in the primary pricing rule type	Defining Transaction Field Mapping in a Primary Pricing Rule Type on page 2961

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For more information on...	See...
How to associate algorithms with the pricing rule type	Associating Algorithms with a Pricing Rule Type on page 2967
How to define additional data for the pricing rule type	Defining Additional Data for a Pricing Rule Type on page 2969
How to add pricing items in the pricing rule type	Adding Price Items in a Pricing Rule Type on page 2971
How to add price item parameters in the pricing rule type	Adding a Price Item Parameter in a Pricing Rule Type on page 2973
How to define a characteristic for the pricing rule type	Defining a Characteristic for a Pricing Rule Type on page 2975
How to add the recurring flat fee specific data in the pricing rule type	Adding the Recurring Flat Fee Specific Data in a Pricing Rule Type on page 3143

Adding the Recurring Flat Fee Specific Data in a Pricing Rule Type

Procedure

To add the recurring flat fee specific data in a pricing rule type:

1. Ensure that the **Flat Fees - Specific Additional Data** section is expanded when you are *d*efining or editing a pricing rule type.

   The **Flat Fees - Specific Additional Data** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Bill Segment Cancel Reason	Used to indicate the bill segment cancel reason.	No
Recurring Fee	Used to specify whether the recurring flat fee or one-time flat fee is required. **Note:** This field cannot be edited.	No
Recurring Method	Used to indicate whether recurring bill segments must be created at the intervals defined in the bill period or at the invoice frequency. The valid values are: • Bill Period • Frequency **Note:** This field appears when you select the checkbox for **Recurring Fee** field. This field cannot be edited.	Yes (Conditional) **Note:** This field is required when you are specifying whether the recurring flat fee is based on bill period or frequency.

   The **Flat Fees - Specific Additional Data** section contains the following sub-section:

   The **Bill Periods** sub-section contains the following column in a grid:

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Column Name	Column Description	Mandatory (Yes or No)
Bill Period	Used to indicate the bill period that you want to use for specifying the intervals at which the recurring bill segments must be created.	Yes

2. Enter the required details in the **Flat Fees - Specific Additional Data** section.
3. Enter the details in the **Bill Periods** sub-section, if required.

> **Note:** This sub-section appears when you have selected **Bill Period** as**Recurring Method**.

4. Click **Save**.
   The Flat Fees - Specific Additional data is added in the pricing rule type.

Related Topics

For more information on...	See...
How to define a bill period based recurring flat fee pricing rule type	Defining a Bill Period Based Recurring Flat Fee Pricing Rule Type on page 3140
How to define a frequency based recurring flat fee pricing rule type	Defining a Frequency Based Recurring Flat Fee Pricing Rule Type on page 3154
How to edit a bill period based recurring flat fee pricing rule type	Editing a Bill Period Based Recurring Flat Fee Pricing Rule Type on page 3144
How to edit a frequency based recurring flat fee pricing rule type	Editing a Frequency Based Recurring Flat Fee Pricing Rule Type on page 3158

Editing a Bill Period Based Recurring Flat Fee Pricing Rule Type

Prerequisites

To edit a bill period based recurring flat fee pricing rule type, you should have:

- Business Object **C1-PricingRuleFlatFees** defined for pricing rule.
- Pricing rule type category for flat fees defined in the application.

Procedure

To edit a bill period based recurring flat fee pricing rule type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **P** and then click **Pricing Rule Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Pricing Rule Type** sub-menu.
   The **Pricing Rule Type** screen appears.
4. In the **Pricing Rule Type List** zone, click the **Edit** (✎) icon in the **Edit** column corresponding to the *P*ricing rule type whose details you want to edit.

   The **Pricing Rule Type** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details about the flat fee pricing rule type.
   - **Related Pricing Rule Types** - Used to define the pricing rule types which are related to the parent pricing rule type.
   - **Transaction Field Mapping** - Used to specify the transaction related data mapped to the pricing rule type
   - **Algorithms** - Used to define the algorithms used for the pricing rule type.

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- **Additional Data** - Used to specify the additional information about the pricing rule type.
- **Price Items** - Used to define the price items assigned to the pricing rule type.
- **Price Item Parameters** - Used to define the price item parameters in the pricing rule type.
- **Characteristics** - Used to define the characteristics for the pricing rule type.
- **Billable Charge Line Types** - Used to define the pricing rule type for billable charge line type.
- **Flat Fees - Specific Additional Data** - Used to specify the flat fees specific for additional data.
    - **Bill Periods** - Used to specify the bill periods for specifying intervals for creating recurring bill segments.

The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Pricing Rule Type	Displays the pricing rule type.	Not applicable
Description	Used to specify the description for the pricing rule type.	Yes
Detailed Description	Used to specify additional information about the pricing rule type.	No
Pricing Rule Business Object	Used to indicate the pricing rule business object. The valid values are: • Claim Pricing Rule • Aggregate Stop-Loss (ASL) Pricing Rule • Specific Stop-Loss (SSL) Pricing Rule • Retention Type Claim Based Pricing Rule • Retention Type Enrollment Based Pricing Rule • Flat Fee Pricing Rule	Yes
Business Object	Indicates the pricing rule type business object for flat fees.	Not applicable
Status	Used to indicate the status of the pricing rule type. The valid values are: • Active • Inactive	Yes
Primary	Used to select the checkbox if the pricing rule type is primary. **Note:** This field is not enabled for selection if the **Pricing Rule Type Category** is **Flat Fees**.	No
Pricing Rule Type Category	Used to indicate the pricing rule type category for the pricing rule type. The valid values are: • Claim • Aggregate Stop-Loss • Specific Stop-Loss • Retention Type Claim Based • Retention Type Enrollment Based • Flat Fees	Yes

Tip: Alternatively, you can edit the details of a bill period based recurring flat fees pricing rule type by clicking the **Edit** button in the **Pricing Rule Type** zone.

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5. Modify the required details in the **Main** section.
6. Define, edit or remove related pricing rule types from the primary pricing rule type, if required.

> **Note:**
>
> **Related Pricing Rule Types** section appears when the pricing rule type is primary.
>
> This section does not appear when the **Pricing Rule Type Category** is **Flat Fees**.

7. Modify the details of transaction field mapping, if required.

> **Note:**
>
> **Transaction Field Mapping** section appears when the pricing rule type is primary.
>
> This section does not appear when the **Pricing Rule Type Category** is **Flat Fees**.

8. Define, edit or remove algorithms from the pricing rule type, if required.
9. Modify additional data for the pricing rule type, if required.

> **Note:** This section does not appear when the **Pricing Rule Type Category** is **Flat Fees**.

10. Define, edit or remove price items from the pricing rule type, if required.
11. Define, edit or remove price items from the pricing rule type, if required.
12. Define, edit, or remove characteristics of the pricing rule type, if required.
13. Define, edit or remove billable charge line types for the flat fees pricing rule type, if required.
14. Modify flat fees - specific additional data in the pricing rule type, if required.

> **Note:**
>
> This section appears when the **Business Object** is **Flat Fees Pricing Rule Type**.
>
> Define, edit or remove bill periods from the pricing rule type, if required.

15. Click **Save**.
    The changes made to the bill period based recurring flat fee pricing rule type are saved.

Related Topics

For more information on...	See...
Pricing Rule Type screen	Pricing Rule Type on page 2942
Pricing Rule Type List zone	Pricing Rule Type List on page 2943
Pricing Rule Type zone	Pricing Rule Type on page 2946
How to add the related pricing rule types in the primary pricing rule type	Adding Related Pricing Rule Types in a Primary Pricing Rule Type on page 2959
How to define the transaction field mapping in the primary pricing rule type	Defining Transaction Field Mapping in a Primary Pricing Rule Type on page 2961
How to associate algorithms with the pricing rule type	Associating Algorithms with a Pricing Rule Type on page 2967
How to define additional data for the pricing rule type	Defining Additional Data for a Pricing Rule Type on page 2969
How to add pricing items in the pricing rule type	Adding Price Items in a Pricing Rule Type on page 2971

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For more information on...	See...
How to add price item parameters in the pricing rule type	Adding a Price Item Parameter in a Pricing Rule Type on page 2973
How to define a characteristic for the pricing rule type	Defining a Characteristic for a Pricing Rule Type on page 2975
How to add the recurring flat fee specific data in the pricing rule type	Adding the Recurring Flat Fee Specific Data in a Pricing Rule Type on page 3143

Deleting a Bill Period Based Recurring Flat Fee Pricing Rule Type

Procedure

To delete a bill period based recurring flat fee pricing rule type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **P** and then click **Pricing Rule Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Pricing Rule Type** sub-menu.
   The **Pricing Rule Type** screen appears.
4. In the **Pricing Rule Type List** zone, click the **Delete** (🗑) icon in the **Delete** column corresponding to the bill period based recurring flat fee pricing rule type that you want to delete.
   A message appears confirming whether you want to delete the bill period based recurring flat fee pricing rule type.

   Note: You can delete a bill period based recurring flat fee pricing rule type when it is not yet used in the system.

   Tip: Alternatively, you can delete a bill period based recurring flat fee pricing rule type by clicking the **Delete** button in the **Pricing Rule Type** zone.
5. Click **OK**.
   The bill period based recurring flat fee pricing rule type is deleted.

Related Topics

For more information on...	See...
Pricing Rule Type screen	Pricing Rule Type on page 2942
Pricing Rule Type List zone	Pricing Rule Type List on page 2943
Pricing Rule Type zone	Pricing Rule Type on page 2946

Viewing the Bill Period Based Recurring Flat Fee Pricing Rule Type Details

Procedure

To view the details of a bill period based recurring flat fee pricing rule type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **P** and then click **Pricing Rule Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Pricing Rule Type** sub-menu.

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The **Pricing Rule Type** screen appears.

4. In the **Pricing Rule Type List** zone, click the **Broadcast** (📡) icon corresponding to the bill period based *r*ecurring flat fee pricing rule type whose details you want to view.
   The **Pricing Rule Type** zone appears.
5. View the details of the bill period based recurring flat fee pricing rule type in the **Pricing Rule Type** zone.

Related Topics

For more information on...	See...
Pricing Rule Type screen	Pricing Rule Type on page 2942
Pricing Rule Type List zone	Pricing Rule Type List on page 2943
Pricing Rule Type zone	Pricing Rule Type on page 2946

Defining a Bill Period Based Recurring Flat Fee Pricing Rule for a Bill Group

Prerequisites

To define a bill period based recurring flat fee pricing rule for a bill group, you should have:

- Business Object **C1-PricingRule** defined for pricing rule.
- Business Object **C1-PricingRuleFlatFees** defined for bill period based recurring flat fee pricing rule.
- Pricing rule type defined in the application.
- Policy status defined in the application.
- Price item defined in the application.
- Billable Charge Line Type defined in the application.

Procedure

To define a bill period based recurring flat fee pricing rule for a bill group:

1. Search for the account, person, or policy whose pricing details you want to view in the **Customer 360° View** screen.
2. In the **Search Results** section, click the **View** (🔗) icon corresponding to the account, person, or policy *w*hose pricing details you want to view.
   The **Account**, **Person**, or **Policy** tab in the **Customer 360° Information** screen appears.
3. Click the **Pricing** tab and then click the **Add** link in the upper right corner of the **Bill Group ASO Policy Pricing Rules** zone.

   The **Pricing Rule** screen appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Person Name	Displays the person name.	Not applicable
Person Type	Displays the person type.	Not applicable
Pricing Rule Type	Used to indicate the pricing rule type to create the pricing rule. **Note:** You can create a bill period based recurring flat fee pricing rule using the **Pricing Rule Type** for flat fees.	Yes
Policy Status	Used to indicate the policy status for pricing rule. The valid values are:	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	• In Force/Active • Runout	

4. Click **OK**.

The **Flat Fee Pricing Rule** screen appears. It contains the following sections:

- **Customer Information** - Displays the customer information for bill group.
- **Main** - Used to specify basic details about the bill period based recurring flat fee pricing rule.
- **Characteristics** - Used to define the characteristics for the bill period based recurring flat fee pricing rule.

The **Customer Information** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Bill Group Information	Displays the bill group information.	Not applicable
Policy Start Date	Displays the policy start date.	Not applicable
Policy End Date	Displays the policy end date.	Not applicable
Policy Status	Indicates the policy status for pricing rule. The valid values are: • In Force/Active • Runout	Not applicable
Pricing Rule Type	Indicates the pricing rule type.	Not applicable

The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Price Item	Used to indicate the price item.	Yes
Charge Start Date	Used to specify the flat fee charge start date.	Yes
Billable Charge Line Type	Used to specify the billable charge line type. **Note:** On clicking the **Search** (🔍) icon, the **Billable Charge Line Type Search** window appears. On specifying the billable charge line type, the description of the billable charge line type appears corresponding to the **Billable Charge Line Type** field.	No
Charge End Date	Used to specify the flat fee charge end date.	No
Bill Period	Used to indicate the bill period for flat fee.	Yes
Fee	Used to specify the amount of flat fee. **Note:** This field appears when you select the billable charge line type in the **Billable Charge Line Type** field.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
Bill To Account Override	Used to specify the account to which the bill is override. **Note:** On clicking the **Search** (🔍) icon, the **Account Search** window appears. On specifying the account, the description of the account appears corresponding to the **Bill To Account Override** field.	Yes

5. Enter the required details in the **Main** section.
6. Define characteristics for a bill period based recurring flat fee pricing rule, if required.
7. Click **Save**.
   The bill period based recurring flat fee pricing rule for a bill group is defined.

Note: A billable charge is created and assigned to the bill period based recurring flat fee pricing rule.

Related Topics

For more information on...	See...
Customer 360° Information - Pricing tab	Customer 360° Information - Pricing Information on page 641
Bill Group ASO Policy Pricing Rules zone	Bill Group Self-Funded Policy Pricing Rules on page 649
How to define a characteristic for a bill period based recurring flat fee pricing rule	Defining a Characteristic for a Bill Period Based Recurring Flat Fee Pricing Rule on page 3150

Defining a Characteristic for a Bill Period Based Recurring Flat Fee Pricing Rule

Prerequisites

To define a characteristic for a bill period based recurring flat fee pricing rule, you should have:

- Characteristic types defined in the application (where the characteristic entity is set to **Pricing Rule**)

Procedure

To define a characteristic for a bill period based recurring flat fee pricing rule:

1. Ensure that the **Characteristics** section is expanded when you are defining or editing a pricing rule.

   The **Characteristics** section contains the following columns in a grid:

Column Name	Column Description	Mandatory (Yes or No)
Effective Date	Used to specify the date from when the characteristic is effective for the bill period based recurring flat fee pricing rule.	Yes (Conditional) **Note:** This field is required when you are defining a characteristic for the bill period based recurring flat fee pricing rule.

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Column Name	Column Description	Mandatory (Yes or No)
Characteristic Type	Used to indicate the characteristic type. **Note:** The list includes only those characteristic types where the characteristic entity is set to **Pricing Rule**.	Yes (Conditional) **Note:** This field is required when you are defining a characteristic for the bill period based recurring flat fee pricing rule.
Characteristic Value	Used to specify the value for the characteristic type. **Note:** If you select a predefined characteristic type, the **Search** (🔍) icon appears corresponding to the **Characteristic Value** field. On clicking the **Search** icon, the **Predefined Characteristic Search** window appears. On specifying the value for a predefined characteristic type, the description of the characteristic value appears corresponding to the **Characteristic Value** field.	Yes (Conditional) **Note:** This field is required when you are defining a characteristic for the bill period based recurring flat fee pricing rule.

2. Enter the required details in the **Characteristics** section.
3. If you want to define more than one characteristic for the bill period based recurring flat fee pricing rule, click the **Add** (+) icon and then repeat step 2.

Note: However, if you want to remove a characteristic from the bill period based recurring flat fee pricing rule, click the **Delete** (🗑) icon corresponding to the characteristic.

4. Click **Save**.
   The characteristics are defined for the bill period based recurring flat fee pricing rule.

Related Topics

For more information on...	See...
How to define a bill period based recurring flat fee pricing rule for a bill group	Defining a Bill Period Based Recurring Flat Fee Pricing Rule for a Bill Group on page 3148
How to edit the bill period based recurring flat fee pricing rule for a bill group	Editing a Bill Period Based Recurring Flat Fee Pricing Rule of a Bill Group on page 3151

Editing a Bill Period Based Recurring Flat Fee Pricing Rule of a Bill Group

Prerequisites

To edit a bill period based recurring flat fee pricing rule of a bill group, you should have:

- Business Object **C1-PricingRuleFlatFees** defined for bill period based recurring flat fee pricing rule.

Procedure

To edit a bill period based recurring flat fee pricing rule of a bill group:

1. Search for the account, person, or policy whose pricing details you want to view in the **Customer 360° View** screen.

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2. In the **Search Results** section, click the **View** (🔗) icon corresponding to the account, person, or policy *w*hose pricing details you want to view.
   The **Account**, **Person**, or **Policy** tab in the **Customer 360° Information** screen appears.
3. Click the **Pricing** tab, in the **Bill Group ASO Policy Pricing Rules** zone click the **Edit** (✎) icon in the **Edit** column corresponding to the pricing rule type for bill period based recurring flat fee *w*hose bill period based recurring flat fee pricing rule details you want to edit.

   The **Flat Fee Pricing Rule** screen appears. It contains the following sections:

   - **Customer Information** - Displays the customer information for bill group.
   - **Main** - Displays the basic details of the bill period based recurring flat fee pricing rule.
   - **Characteristics** - Used to define the characteristics for the bill period based recurring flat fee pricing rule.

   The **Customer Information** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Bill Group Information	Displays the bill group information.	Not applicable
Policy Start Date	Displays the policy start date.	Not applicable
Policy End Date	Displays the policy end date.	Not applicable
Policy Status	Indicates the policy status for pricing rule. The valid values are: • In Force/Active • Runout	Not applicable
Pricing Rule Type	Indicates the pricing rule type.	Not applicable

   The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Price Item	Indicates the price item.	Not applicable
Charge Start Date	Used to specify the flat fee charge start date.	Yes
Charge End Date	Used to specify the flat fee charge end date.	Yes
Billable Charge Line Type	Displays the billable charge line type.	Not applicable
Bill Period	Indicates the bill period for flat fee.	Not applicable
Fee	Used to specify the amount of flat fee. **Note:** This field appears when you have added the billable charge line type in the **Billable Charge Line Type** field.	Yes
Bill To Account Override	Displays the account to which the bill is override.	Not applicable
Billable Charge Information	Displays the billable charge information.	Not applicable

4. Modify the basic details of the bill period based recurring flat fee pricing rule, if required.
5. Add, edit, or remove characteristics for a bill period based recurring flat fee pricing rule, if required.
6. Click **Save**.

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Note:

If **Fee** is modified then,

- The bill period based recurring flat fee is saved as a one time charge process.

If **Charge Start Date** is modified then it checks whether bill segment is already created for a period which is not available for the updated duration then,

- Bill segment is deleted and existing billable charge is updated.
- For recurring flat fee bill segments are not created or is in cancelled status.

Note: The modified charge start date should be a future date and not past date.

The changes made to a bill period based recurring flat fee pricing rule for a bill group are saved.

Related Topics

For more information on...	See...
Customer 360° Information - Pricing tab	Customer 360° Information - Pricing Information on page 641
Bill Group ASO Policy Pricing Rules zone	Bill Group Self-Funded Policy Pricing Rules on page 649
How to define a characteristic for a bill period based recurring flat fee pricing rule	Defining a Characteristic for a Bill Period Based Recurring Flat Fee Pricing Rule on page 3150

Viewing a Bill Period Based Recurring Flat Fee Pricing Rule of a Bill Group

Procedure

To view a bill period based recurring flat fee pricing rule of a bill group:

1. Search for the account, person, or policy whose pricing details you want to view in the **Customer 360° View** screen.
2. In the **Search Results** section, click the **View** (🔗) icon corresponding to the account, person, *or* policy whose pricing details you want to view.
   The **Account**, **Person**, or **Policy** tab in the **Customer 360° Information** screen appears.
3. Click the **Pricing** tab.
4. In the **Bill Group ASO Policy Information** zone, click the **Broadcast** (📡) icon corresponding *t*o the bill group whose bill period based recurring flat fee pricing rule bill group details you want to view.
5. In the **Bill Group ASO Policy Pricing Rules** zone, click the link in the **Pricing Rule Information** column corresponding to the bill period based recurring flat fee pricing rule type whose bill period based flat fee pricing rule bill group you want to view.

   The **Pricing Rule** screen appears. It contains the following zone:

   - **Flat Fee** - Displays the pricing rule bill period based recurring flat fee details for a bill group. It contains the following sections:
     - **Main** - Displays the basic details of the bill period based recurring flat fee pricing rule.
     - **Characteristics** - Displays the characteristics defined for the bill period based recurring flat fee pricing rule.
6. View the basic details of bill period based recurring flat fee pricing rule in the **Main** section.
7. View the characteristics of the bill period based recurring flat fee pricing rule in the **Characteristics** section.

Related Topics

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For more information on...	See...
Customer 360° Information - Pricing tab	Customer 360° Information - Pricing Information on page 641
Bill Group ASO Policy Pricing Rules zone	Bill Group Self-Funded Policy Pricing Rules on page 649
Pricing Rule screen	Pricing Rule (Used for Viewing) on page 689
Flat Fee zone	Flat Fee on page 706

Deleting a Bill Period Based Recurring Flat Fee Pricing Rule of a Bill Group

Procedure

To delete a bill period based recurring flat fee pricing rule of a bill group:

1. Search for the account, person, or policy whose pricing details you want to view in the **Customer 360° View** screen.
2. In the **Search Results** section, click the **View** (🔗) icon corresponding to the *a*ccount, person, or policy whose pricing details you want to view.
   The **Account**, **Person**, or **Policy** tab in the **Customer 360° Information** screen appears.
3. Click the **Pricing** tab, in the **Bill Group ASO Policy Pricing Rules** zone, click the **Delete** (🗑) icon in the **Delete** column corresponding to the bill period based recurring flat fee pricing rule type whose bill period based recurring flat fee pricing rule you want to delete.
   A message appears confirming whether you want to delete the bill period based recurring flat fee pricing rule.
4. Click **OK**.
   The bill period based recurring flat fee pricing rule is deleted.

Related Topics

For more information on...	See...
Customer 360° Information - Pricing tab	Customer 360° Information - Pricing Information on page 641
Bill Group ASO Policy Pricing Rules zone	Bill Group Self-Funded Policy Pricing Rules on page 649

Defining a Frequency Based Recurring Flat Fee Pricing Rule Type

Prerequisites

To define a frequency based recurring flat fee pricing rule type, you should have:

- Business Object **C1-PricingRuleTypeFlatFees** defined for pricing rule type.
- Business Object **C1-PricingRuleFlatFees** defined for pricing rule.
- Pricing rule type category for flat fees defined in the application.

Procedure

To define a frequency based recurring flat fee pricing rule type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **P** and then click **Pricing Rule Type**.
   A sub-menu appears.
3. Click the **Add** option from the **Pricing Rule Type** sub-menu.

   The **Select Business Object** screen appears. It contains the following field:

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Field Name	Field Description	Mandatory (Yes or No)
Pricing Rule Type Business Object	Used to indicate the business object using which you want to create the pricing rule type. **Note:** You can create a frequency based recurring flat fee pricing rule type using the **Flat Fee Pricing Rule Type** business object.	Yes

Tip: Alternatively, you can access this screen by clicking the **Add** button in the **Page Title** area of the **Pricing Rule Type** screen.

4. Select the **Flat Fee Pricing Rule Type** business object.
5. Click **OK**.

The **Flat Fee Pricing Rule Type** screen appears. It contains the following sections:

- **Main** - Used to specify basic details about the flat fee pricing rule type.
- **Related Pricing Rule Types** - Used to define the pricing rule types which are related to the parent pricing rule type.
- **Transaction Field Mapping** - Used to specify the transaction related data mapped to the pricing rule type
- **Algorithms** - Used to define the algorithms used for the pricing rule type.
- **Additional Data** - Used to specify the additional information about the pricing rule type.
- **Price Items** - Used to define the price items assigned to the pricing rule type.
- **Price Item Parameters** - Used to define the price item parameters in the pricing rule type.
- **Characteristics** - Used to define the characteristics for the pricing rule type.
- **Billable Charge Line Types** - Used to define the pricing rule type for billable charge line type.
- **Flat Fees - Specific Additional Data** - Used to specify the flat fees specific for additional data.

The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Pricing Rule Type	Used to specify the pricing rule type.	Yes
Description	Used to specify the description for the pricing rule type.	Yes
Detailed Description	Used to specify additional information about the pricing rule type.	No
Pricing Rule Business Object	Used to indicate the pricing rule business object. The valid values are: • Claim Pricing Rule • Aggregate Stop-Loss (ASL) Pricing Rule • Specific Stop-Loss (SSL) Pricing Rule • Retention Type Claim Based Pricing Rule • Retention Type Enrollment Based Pricing Rule • Flat Fee Pricing Rule	Yes
Business Object	Indicates the pricing rule type business object for flat fees.	Not applicable
Status	Used to indicate the status of the pricing rule type. The valid values are: • Active	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	• Inactive	
Primary	Used to select the checkbox if the pricing rule type is primary. **Note:** This field is not enabled for selection if the **Pricing Rule Type Category** is **Flat Fees**.	No
Pricing Rule Type Category	Used to indicate the pricing rule type category for the pricing rule type. The valid values are: • Claim • Aggregate Stop-Loss • Specific Stop-Loss • Retention Type Claim Based • Retention Type Enrollment Based • Flat Fees	Yes

6. Enter the required details in the **Main** section.
7. Add the related pricing rule types in the primary pricing rule type, if required.

> **Note:**
>
> **Related Pricing Rule Types** section appears when the pricing rule type is primary.
>
> This section does not appear when the **Pricing Rule Type Category** is **Flat Fees**.

8. Define the transaction field mapping in the primary pricing rule type, if required.

> **Note:**
>
> **Transaction Field Mapping** section appears when the pricing rule type is primary.
>
> This section does not appear when the **Pricing Rule Type Category** is **Flat Fees**.

9. Associate algorithms with the pricing rule type, if required.
10. Define additional data for the pricing rule type, if required.

> **Note:** This section does not appear when the **Pricing Rule Type Category** is **Flat Fees**.

11. Add pricing items in the pricing rule type, if required.
12. Add price item parameters in the pricing rule type, if required.
13. Define characteristics for the pricing rule type, if required.
14. Define billable charge line types in the flat fees pricing rule type, if required.
15. Add the flat fees - specific additional data in the pricing rule type, if required.

> **Note:**
>
> This section appears when the **Business Object** is **Flat Fees Pricing Rule Type**.

16. Click **Save**.
    The frequency based recurring flat fee pricing rule type is defined.

Related Topics

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For more information on...	See...
Pricing Rule Type screen	Pricing Rule Type on page 2942
How to add the related pricing rule types in the primary pricing rule type	Adding Related Pricing Rule Types in a Primary Pricing Rule Type on page 2959
How to define the transaction field mapping in the primary pricing rule type	Defining Transaction Field Mapping in a Primary Pricing Rule Type on page 2961
How to associate algorithms with the pricing rule type	Associating Algorithms with a Pricing Rule Type on page 2967
How to define additional data for the pricing rule type	Defining Additional Data for a Pricing Rule Type on page 2969
How to add pricing items in the pricing rule type	Adding Price Items in a Pricing Rule Type on page 2971
How to add price item parameters in the pricing rule type	Adding a Price Item Parameter in a Pricing Rule Type on page 2973
How to define a characteristic for the pricing rule type	Defining a Characteristic for a Pricing Rule Type on page 2975
How to add the recurring flat fee specific data in the pricing rule type	Adding the Recurring Flat Fee Specific Data in a Pricing Rule Type on page 3143

Adding the Recurring Flat Fee Specific Data in a Pricing Rule Type

Procedure

To add the recurring flat fee specific data in a pricing rule type:

1. Ensure that the **Flat Fees - Specific Additional Data** section is expanded when you are *d*efining or editing a pricing rule type.

   The **Flat Fees - Specific Additional Data** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Bill Segment Cancel Reason	Used to indicate the bill segment cancel reason.	No
Recurring Fee	Used to specify whether the recurring flat fee or one-time flat fee is required. **Note:** This field cannot be edited.	No
Recurring Method	Used to indicate whether recurring bill segments must be created at the intervals defined in the bill period or at the invoice frequency. The valid values are: • Bill Period • Frequency	Yes (Conditional) **Note:** This field is required when you are specifying whether the recurring flat fee is based on bill period or frequency.

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Field Name	Field Description	Mandatory (Yes or No)
	Note: This field appears when you select the checkbox for **Recurring Fee** field. This field cannot be edited.	

The **Flat Fees - Specific Additional Data** section contains the following sub-section:

The **Bill Periods** sub-section contains the following column in a grid:

Column Name	Column Description	Mandatory (Yes or No)
Bill Period	Used to indicate the bill period that you want to use for specifying the intervals at which the recurring bill segments must be created.	Yes

2. Enter the required details in the **Flat Fees - Specific Additional Data** section.
3. Enter the details in the **Bill Periods** sub-section, if required.

Note: This sub-section appears when you have selected **Bill Period** as**Recurring Method**.

4. Click **Save**.
   The Flat Fees - Specific Additional data is added in the pricing rule type.

Related Topics

For more information on...	See...
How to define a bill period based recurring flat fee pricing rule type	Defining a Bill Period Based Recurring Flat Fee Pricing Rule Type on page 3140
How to define a frequency based recurring flat fee pricing rule type	Defining a Frequency Based Recurring Flat Fee Pricing Rule Type on page 3154
How to edit a bill period based recurring flat fee pricing rule type	Editing a Bill Period Based Recurring Flat Fee Pricing Rule Type on page 3144
How to edit a frequency based recurring flat fee pricing rule type	Editing a Frequency Based Recurring Flat Fee Pricing Rule Type on page 3158

Editing a Frequency Based Recurring Flat Fee Pricing Rule Type

Prerequisites

To edit a frequency based recurring flat fee pricing rule type, you should have:

- Business Object **C1-PricingRuleFlatFees** defined for pricing rule.
- Pricing rule type category for flat fees defined in the application.

Procedure

To edit a frequency based recurring flat fee pricing rule type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **P** and then click **Pricing Rule Type**.
   A sub-menu appears.

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3. Click the **Search** option from the **Pricing Rule Type** sub-menu.
   The **Pricing Rule Type** screen appears.
4. In the **Pricing Rule Type List** zone, click the **Edit** (✎) icon in the **Edit** column corresponding to the *P*ricing rule type whose details you want to edit.

   The **Pricing Rule Type** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details about the flat fee pricing rule type.
   - **Related Pricing Rule Types** - Used to define the pricing rule types which are related to the parent pricing rule type.
   - **Transaction Field Mapping** - Used to specify the transaction related data mapped to the pricing rule type
   - **Algorithms** - Used to define the algorithms used for the pricing rule type.
   - **Additional Data** - Used to specify the additional information about the pricing rule type.
   - **Price Items** - Used to define the price items assigned to the pricing rule type.
   - **Price Item Parameters** - Used to define the price item parameters in the pricing rule type.
   - **Characteristics** - Used to define the characteristics for the pricing rule type.
   - **Billable Charge Line Types** - Used to define the pricing rule type for billable charge line type.
   - **Flat Fees - Specific Additional Data** - Used to specify the flat fees specific for additional data.

   The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Pricing Rule Type	Displays the pricing rule type.	Not applicable
Description	Used to specify the description for the pricing rule type.	Yes
Detailed Description	Used to specify additional information about the pricing rule type.	No
Pricing Rule Business Object	Used to indicate the pricing rule business object. The valid values are: • Claim Pricing Rule • Aggregate Stop-Loss (ASL) Pricing Rule • Specific Stop-Loss (SSL) Pricing Rule • Retention Type Claim Based Pricing Rule • Retention Type Enrollment Based Pricing Rule • Flat Fee Pricing Rule	Yes
Business Object	Indicates the pricing rule type business object for flat fees.	Not applicable
Status	Used to indicate the status of the pricing rule type. The valid values are: • Active • Inactive	Yes
Primary	Used to select the checkbox if the pricing rule type is primary. **Note:** This field is not enabled for selection if the **Pricing Rule Type Category** is **Flat Fees**.	No
Pricing Rule Type Category	Used to indicate the pricing rule type category for the pricing rule type. The valid values are:	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	• Claim • Aggregate Stop-Loss • Specific Stop-Loss • Retention Type Claim Based • Retention Type Enrollment Based • Flat Fees	

Tip: Alternatively, you can edit the details of a frequency based recurring flat fees pricing rule type by clicking the **Edit** button in the **Pricing Rule Type** zone.

5. Modify the required details in the **Main** section.
6. Define, edit or remove related pricing rule types from the primary pricing rule type, if required.

Note:

Related Pricing Rule Types section appears when the pricing rule type is primary.

This section does not appear when the **Pricing Rule Type Category** is **Flat Fees**.

7. Modify the details of transaction field mapping, if required.

Note:

Transaction Field Mapping section appears when the pricing rule type is primary.

This section does not appear when the **Pricing Rule Type Category** is **Flat Fees**.

8. Define, edit or remove algorithms from the pricing rule type, if required.
9. Modify additional data for the pricing rule type, if required.

Note: This section does not appear when the **Pricing Rule Type Category** is **Flat Fees**.

10. Define, edit or remove price items from the pricing rule type, if required.
11. Define, edit or remove price items from the pricing rule type, if required.
12. Define, edit, or remove characteristics of the pricing rule type, if required.
13. Define, edit or remove billable charge line types for the flat fees pricing rule type, if required.
14. Modify flat fees - specific additional data in the pricing rule type, if required.

Note: This section appears when the **Business Object** is **Flat Fees Pricing Rule Type**.

15. Click **Save**.
    The changes made to the frequency based recurring flat fee pricing rule type are saved.

Related Topics

For more information on...	See...
Pricing Rule Type screen	Pricing Rule Type on page 2942
Pricing Rule Type List zone	Pricing Rule Type List on page 2943
Pricing Rule Type zone	Pricing Rule Type on page 2946
How to add the related pricing rule types in the primary pricing rule type	Adding Related Pricing Rule Types in a Primary Pricing Rule Type on page 2959

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For more information on...	See...
How to define the transaction field mapping in the primary pricing rule type	Defining Transaction Field Mapping in a Primary Pricing Rule Type on page 2961
How to associate algorithms with the pricing rule type	Associating Algorithms with a Pricing Rule Type on page 2967
How to define additional data for the pricing rule type	Defining Additional Data for a Pricing Rule Type on page 2969
How to add pricing items in the pricing rule type	Adding Price Items in a Pricing Rule Type on page 2971
How to add price item parameters in the pricing rule type	Adding a Price Item Parameter in a Pricing Rule Type on page 2973
How to define a characteristic for the pricing rule type	Defining a Characteristic for a Pricing Rule Type on page 2975
How to add the recurring flat fee specific data in the pricing rule type	Adding the Recurring Flat Fee Specific Data in a Pricing Rule Type on page 3143

Deleting a Frequency Based Recurring Flat Fee Pricing Rule Type

Procedure

To delete a frequency based recurring flat fee pricing rule type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **P** and then click **Pricing Rule Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Pricing Rule Type** sub-menu.
   The **Pricing Rule Type** screen appears.
4. In the **Pricing Rule Type List** zone, click the **Delete** (🗑) icon in the **Delete** column corresponding *t*o the frequency based recurring flat fee pricing rule type that you want to delete.
   A message appears confirming whether you want to delete the frequency based recurring flat fee pricing rule type.

   Note: You can delete a frequency based recurring flat fee pricing rule type when it is not yet used in the system.

   Tip: Alternatively, you can delete a frequency based recurring flat fee pricing rule type by clicking the **Delete** button in the **Pricing Rule Type** zone.
5. Click **OK**.
   The frequency based recurring flat fee pricing rule type is deleted.

Related Topics

For more information on...	See...
Pricing Rule Type screen	Pricing Rule Type on page 2942
Pricing Rule Type List zone	Pricing Rule Type List on page 2943
Pricing Rule Type zone	Pricing Rule Type on page 2946

Viewing the Frequency Based Recurring Flat Fee Pricing Rule Type Details

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Procedure

To view the details of a frequency based recurring flat fee pricing rule type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **P** and then click **Pricing Rule Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Pricing Rule Type** sub-menu.
   The **Pricing Rule Type** screen appears.
4. In the **Pricing Rule Type List** zone, click the **Broadcast** (📡) icon corresponding to the frequency based *r*ecurring flat fee pricing rule type whose details you want to view.
   The **Pricing Rule Type** zone appears.
5. View the details of the frequency based recurring flat fee pricing rule type in the **Pricing Rule Type** zone.

Related Topics

For more information on...	See...
Pricing Rule Type screen	Pricing Rule Type on page 2942
Pricing Rule Type List zone	Pricing Rule Type List on page 2943
Pricing Rule Type zone	Pricing Rule Type on page 2946

Defining a Frequency Based Recurring Flat Fee Pricing Rule for a Bill Group

Prerequisites

To define a frequency based recurring flat fee pricing rule for a bill group, you should have:

- Business Object **C1-PricingRule** defined for pricing rule.
- Business Object **C1-PricingRuleFlatFees** defined for frequency based recurring flat fee pricing rule.
- Pricing rule type defined in the application.
- Policy status defined in the application.
- Price item defined in the application.
- Billable Charge Line Type defined in the application.

Procedure

To define a frequency based recurring flat fee pricing rule for a bill group:

1. Search for the account, person, or policy whose pricing details you want to view in the **Customer 360° View** screen.
2. In the **Search Results** section, click the **View** (🔗) icon corresponding to the account, person, *o*r policy whose pricing details you want to view.
   The **Account**, **Person**, or **Policy** tab in the **Customer 360° Information** screen appears.
3. Click the **Pricing** tab and then click the **Add** link in the upper right corner of the **Bill Group ASO Policy Pricing Rules** zone.

   The **Pricing Rule** screen appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Person Name	Displays the person name.	Not applicable
Person Type	Displays the person type.	Not applicable

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Field Name	Field Description	Mandatory (Yes or No)
Pricing Rule Type	Used to indicate the pricing rule type to create the pricing rule. **Note:** You can create a frequency based recurring flat fee pricing rule using the **Pricing Rule Type** for flat fees.	Yes
Policy Status	Used to indicate the policy status for pricing rule. The valid values are: • In Force/Active • Runout	Yes

4. Click **OK**.

The **Flat Fee Pricing Rule** screen appears. It contains the following sections:

- **Customer Information** - Displays the customer information for bill group.
- **Main** - Used to specify basic details about the frequency based recurring flat fee pricing rule.
- **Characteristics** - Used to define the characteristics for the frequency based recurring flat fee pricing rule.

The **Customer Information** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Bill Group Information	Displays the bill group information.	Not applicable
Policy Start Date	Displays the policy start date.	Not applicable
Policy End Date	Displays the policy end date.	Not applicable
Policy Status	Indicates the policy status for pricing rule. The valid values are: • In Force/Active • Runout	Not applicable
Pricing Rule Type	Indicates the pricing rule type.	Not applicable

The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Price Item	Used to indicate the price item.	Yes
Charge Start Date	Used to specify the flat fee charge start date.	Yes
Billable Charge Line Type	Used to specify the billable charge line type. **Note:** On clicking the **Search** (🔍) icon, the **Billable Charge Line Type Search** window appears. On specifying the billable charge line type, the description of the billable charge line type appears corresponding to the **Billable Charge Line Type** field.	No
Charge End Date	Used to specify the flat fee charge end date.	No

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Field Name	Field Description	Mandatory (Yes or No)
Frequency	Used to indicate the frequency for flat fee.	Yes
Fee	Used to specify the amount of flat fee. **Note:** This field appears when you select the billable charge line type in the **Billable Charge Line Type** field.	Yes
Bill To Account Override	Used to specify the account to which the bill is override. **Note:** On clicking the **Search** (🔍) icon, the **Account Search** window appears. On specifying the account, the description of the account appears corresponding to the **Bill To Account Override** field.	Yes

5. Enter the required details in the **Main** section.
6. Define characteristics for a frequency based recurring flat fee pricing rule, if required.
7. Click **Save**.
   The frequency based recurring flat fee pricing rule for a bill group is defined.

Note: A billable charge is created and assigned to the frequency based recurring flat fee pricing rule.

Related Topics

For more information on...	See...
Customer 360° Information - Pricing tab	Customer 360° Information - Pricing Information on page 641
Bill Group ASO Policy Pricing Rules zone	Bill Group Self-Funded Policy Pricing Rules on page 649
How to define a characteristic for a frequency based recurring flat fee pricing rule	Defining a Characteristic for a Frequency Based Recurring Flat Fee Pricing Rule on page 3164

Defining a Characteristic for a Frequency Based Recurring Flat Fee Pricing Rule

Prerequisites

To define a characteristic for a frequency based recurring flat fee pricing rule, you should have:

- Characteristic types defined in the application (where the characteristic entity is set to **Pricing Rule**)

Procedure

To define a characteristic for a frequency based recurring flat fee pricing rule:

1. Ensure that the **Characteristics** section is expanded when you are defining or editing a pricing rule.

   The **Characteristics** section contains the following columns in a grid:

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Column Name	Column Description	Mandatory (Yes or No)
Effective Date	Used to specify the date from when the characteristic is effective for the frequency based recurring flat fee pricing rule.	Yes (Conditional) **Note:** This field is required when you are defining a characteristic for the frequency based recurring flat fee pricing rule.
Characteristic Type	Used to indicate the characteristic type. **Note:** The list includes only those characteristic types where the characteristic entity is set to **Pricing Rule**.	Yes (Conditional) **Note:** This field is required when you are defining a characteristic for the frequency based recurring flat fee pricing rule.
Characteristic Value	Used to specify the value for the characteristic type. **Note:** If you select a predefined characteristic type, the **Search** (🔍) icon appears corresponding to the **Characteristic Value** field. On clicking the **Search** icon, the **Predefined Characteristic Search** window appears. On specifying the value for a predefined characteristic type, the description of the characteristic value appears corresponding to the **Characteristic Value** field.	Yes (Conditional) **Note:** This field is required when you are defining a characteristic for the frequency based recurring flat fee pricing rule.

2. Enter the required details in the **Characteristics** section.
3. If you want to define more than one characteristic for the frequency based recurring flat fee pricing rule, click the **Add** (+) icon and then repeat step 2.

Note: However, if you want to remove a characteristic from the frequency based recurring flat fee pricing rule, click the **Delete** (🗑) icon corresponding to the characteristic.

4. Click **Save**.
   The characteristics are defined for the frequency based recurring flat fee pricing rule.

Related Topics

For more information on...	See...
How to define a frequency based recurring flat fee pricing rule for a bill group	Defining a Frequency Based Recurring Flat Fee Pricing Rule for a Bill Group on page 3162
How to edit the frequency based recurring flat fee pricing rule for a bill group	Editing a Frequency Based Recurring Flat Fee Pricing Rule of a Bill Group on page 3165

Editing a Frequency Based Recurring Flat Fee Pricing Rule of a Bill Group

Prerequisites

To edit a frequency based recurring flat fee pricing rule of a bill group, you should have:

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- Business Object **C1-PricingRuleFlatFees** defined for frequency based recurring flat fee pricing rule.

Procedure

To edit a frequency based recurring flat fee pricing rule of a bill group:

1. Search for the account, person, or policy whose pricing details you want to view in the **Customer 360° View** screen.
2. In the **Search Results** section, click the **View** (🔗) icon corresponding to the account, person, or policy *w*hose pricing details you want to view.
   The **Account**, **Person**, or **Policy** tab in the **Customer 360° Information** screen appears.
3. Click the **Pricing** tab, in the **Bill Group ASO Policy Pricing Rules** zone click the **Edit** (✎) icon in the **Edit** column corresponding to the pricing rule type for frequency based recurring flat fee whose frequency based recurring flat fee pricing rule details you want to edit.

   The **Flat Fee Pricing Rule** screen appears. It contains the following sections:

   - **Customer Information** - Displays the customer information for bill group.
   - **Main** - Displays the basic details of the frequency based recurring flat fee pricing rule.
   - **Characteristics** - Used to define the characteristics for the frequency based recurring flat fee pricing rule.

   The **Customer Information** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Bill Group Information	Displays the bill group information.	Not applicable
Policy Start Date	Displays the policy start date.	Not applicable
Policy End Date	Displays the policy end date.	Not applicable
Policy Status	Indicates the policy status for pricing rule. The valid values are: • In Force/Active • Runout	Not applicable
Pricing Rule Type	Indicates the pricing rule type.	Not applicable

   The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Price Item	Indicates the price item.	Not applicable
Charge Start Date	Used to specify the flat fee charge start date.	Yes
Charge End Date	Used to specify the flat fee charge end date.	Yes
Billable Charge Line Type	Displays the billable charge line type.	Not applicable
Frequency	Indicates the frequency for flat fee.	Not applicable
Fee	Used to specify the amount of flat fee. **Note:** This field appears when you have added the billable charge line type in the **Billable Charge Line Type** field.	Yes
Bill To Account Override	Displays the account to which the bill is override.	Not applicable
Billable Charge Information	Displays the billable charge information.	Not applicable

4. Modify the basic details of the frequency based recurring flat fee pricing rule, if required.

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5. Add, edit, or remove characteristics for a frequency based recurring flat fee pricing rule, if required.
6. Click **Save**.

Note:

If **Fee** is modified then,

- The frequency based recurring flat fee is saved as a one time charge process.

If **Charge Start Date** is modified then it checks whether bill segment is already created for a period which is not available for the updated duration then,

- Bill segment is deleted and existing billable charge is updated.
- For recurring flat fee bill segments are not created or is in cancelled status.

Note: The modified charge start date should be a future date and not past date.

The changes made to a frequency based recurring flat fee pricing rule for a bill group are saved.

Related Topics

For more information on...	See...
Customer 360° Information - Pricing tab	Customer 360° Information - Pricing Information on page 641
Bill Group ASO Policy Pricing Rules zone	Bill Group Self-Funded Policy Pricing Rules on page 649
How to define a characteristic for a frequency based recurring flat fee pricing rule	Defining a Characteristic for a Frequency Based Recurring Flat Fee Pricing Rule on page 3164

Viewing a Frequency Based Recurring Flat Fee Pricing Rule of a Bill Group

Procedure

To view a frequency based recurring flat fee pricing rule of a bill group:

1. Search for the account, person, or policy whose pricing details you want to view in the **Customer 360° View** screen.
2. In the **Search Results** section, click the **View** (🔗) icon corresponding to the account, person, or policy *w*hose pricing details you want to view.
   The **Account**, **Person**, or **Policy** tab in the **Customer 360° Information** screen appears.
3. Click the **Pricing** tab.
4. In the **Bill Group ASO Policy Information** zone, click the **Broadcast** (📡) icon corresponding to the bill group *w*hose frequency based recurring flat fee pricing rule bill group details you want to view.
5. In the **Bill Group ASO Policy Pricing Rules** zone, click the link in the **Pricing Rule Information** column *c*orresponding to the frequency based recurring flat fee pricing rule type whose frequency based flat fee pricing rule bill group you want to view.
   The **Pricing Rule** screen appears. It contains the following zone:
   - **Flat Fee** - Displays the pricing rule frequency based recurring flat fee details for a bill group. It contains the following sections:
     - **Main** - Displays the basic details of the frequency based recurring flat fee pricing rule.
     - **Characteristics** - Displays the characteristics defined for the frequency based recurring flat fee pricing rule.
6. View the basic details of frequency based recurring flat fee pricing rule in the **Main** section.
7. View the characteristics of the frequency based recurring flat fee pricing rule in the **Characteristics** section.

Related Topics

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For more information on...	See...
Customer 360° Information - Pricing tab	Customer 360° Information - Pricing Information on page 641
Bill Group ASO Policy Pricing Rules zone	Bill Group Self-Funded Policy Pricing Rules on page 649
Pricing Rule screen	Pricing Rule (Used for Viewing) on page 689
Flat Fee zone	Flat Fee on page 706

Deleting a Frequency Based Recurring Flat Fee Pricing Rule of a Bill Group

Procedure

To delete a frequency based recurring flat fee pricing rule of a bill group:

1. Search for the account, person, or policy whose pricing details you want to view in the **Customer 360° View** screen.
2. In the **Search Results** section, click the **View** (🔗) icon corresponding to the account, person, or policy *w*hose pricing details you want to view.
   The **Account**, **Person**, or **Policy** tab in the **Customer 360° Information** screen appears.
3. Click the **Pricing** tab, in the **Bill Group ASO Policy Pricing Rules** zone, click the **Delete** (🗑) icon in the **Delete** column corresponding to the frequency based recurring flat fee pricing rule type whose frequency based recurring flat fee pricing rule you want to delete.
   A message appears confirming whether you want to delete the frequency based recurring flat fee pricing rule.
4. Click **OK**.
   The frequency based recurring flat fee pricing rule is deleted.

Related Topics

For more information on...	See...
Customer 360° Information - Pricing tab	Customer 360° Information - Pricing Information on page 641
Bill Group ASO Policy Pricing Rules zone	Bill Group Self-Funded Policy Pricing Rules on page 649

Ancillary Pricing

The Administrative Services Only (ASO) provider may process some adhoc charges with respect to preventive care, vaccination, diagnostic, and so on. These adhoc charges may also occur due to some corrections in the claim transactions which are already billed to the customer. Oracle Revenue Management and Billing enables you to process and bill these ancillary transactions to the self-funded employer.

The system enables you to create an ancillary charge in either of the following ways:

- Create a pass through charge without markup or markdown (i.e. flat charge).
- Create a pass through charge with a flat or percentage based markup or markdown.
- Create a rate based charge using the rate defined in the ancillary pricing and the service quantity specified in the ancillary transaction. You can also apply markup or markdown to a rate based charge.

You can use any custom mechanism or the file upload utility in ORMB to upload the ancillary transactions. The pricing for the ancillary transactions can be defined using the ancillary pricing rules. You can define an ancillary pricing rule at the parent customer and bill group levels. The ancillary pricing rule at the bill group level takes precedence over the ancillary pricing rule at the parent customer level. You can define the ancillary pricing rules for parent customers and bill groups from the **Customer 360° Information** screen. You can define an ancillary pricing rule using an ancillary pricing rule type. It is the ancillary pricing rule type which helps the system to determine:

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

  Note: You must select the **Primary** option while defining an ancillary pricing rule type. On selecting the **Primary** option, the **Related Pricing Rule Types** and **Transaction Field Mapping** sections appear in the **Ancillary Pricing Rule Type** screen.
- Rule type which indicates the rules that should be executed to determine whether the related pricing rule type is eligible for deriving the transaction legs.
- Transaction fields from where the data from the ancillary transaction should be stored in the respective fields (for example, the data from the **UDF_CHAR_1** transaction field must be stored in the **Parameter 1** field which will be used for deriving the bill group and pricing).
- Algorithm which should be triggered for validating an ancillary transaction.

  Note: An algorithm type for validating an ancillary transaction is not shipped with the product. You can create a custom algorithm type, if required.
- Algorithm which should be triggered for deriving the bill group, parent customer, and policy for an ancillary transaction.

  Note: You must create an algorithm using the **C1_TXNBGDRV** algorithm type and attach it to the **Bill Group Derivation** system event.
- Algorithm which should be triggered for deriving the account and price item for an ancillary transaction.

  Note: You must create an algorithm using the **C1_ACCPRIDRV** algorithm type and attach it to the **Account and Price Item Derivation** system event.
- Algorithm which should be triggered for determining the bill after date.

  Note: You must create an algorithm using the **C1_BAFTDRV** algorithm type and attach it to the **Bill After Date Determination** system event.
- Pricing rule post-processing algorithm which should be triggered once the effective ancillary pricing rule is derived.

  Note: A pricing rule post-processing algorithm type is not shipped with the product. You can create a custom algorithm type, if required.
- Additional generic information, such as:
  - Whether the price items included in the ancillary pricing rule type are eligible for specific stop-loss and aggregate stop-loss.
  - Whether the price items included in the ancillary pricing rule type are eligible for level funding.
  - Whether the ancillary charges should be written off when the bill is generated in the post runout period of the policy. In this case, a write-off adjustment is created against the respective bill segment during the post bill completion. The write-off adjustment is created using the post runout write-off adjustment type which is specified in the ancillary pricing rule type.
  - Transaction field which you want to use in the rules as the output parameter to determine whether the price item should be considered for billing.
  - Transaction field which you want to use in the rules as the output parameter to determine whether the related pricing rule type should be considered for deriving the transaction legs.
  - Value which the output parameter in the rule should return when the price item and related pricing rule type in the ancillary pricing rule type should be considered for processing.
- Price items for which you can define ancillary pricing rules using the ancillary pricing rule type.
- Rate options that you can use while defining the pricing for the ancillary price items.
- Different type of account to which a price item should be billed based on the specified priority.
- Rule type which indicates the rules that should be executed to determine whether the price item is eligible for billing.

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- Price item parameters based on which you want to define the price item pricing. Two price item parameters are mandatory in the ancillary pricing rule type - one which stores the billable charge line type from the ancillary transaction and another which stores the pricing arrangement from the ancillary transaction. The following pricing arrangements are supported in the ancillary pricing rule:
  - Pass Through Charge Without Markup and Markdown
  - Pass Through Charge With Markup and Markdown
  - Rate Based Charge Without Markup and Markdown
  - Rate Based Charge With Markup and Markdown

  Note: The price item parameters (for example, BCHGLINETYPE and PRICINGARRANGEMENT) which you include in the ancillary pricing rule type must be defined in the **Billable Charge Line Type Parameter** and **Pricing Arrangement Parameter** option types of the **C1-ASOBLLNG** feature configuration, respectively.
- Additional ancillary-specific information, such as:
  - Identifiers which help to determine whether the ancillary transaction is eligible for billing for not.
  - Transaction field which you want to use in the rules as the output parameter to determine whether the markup or markdown calculation line is eligible for billing.
  - Billable charge line type using which you want to create billable charges for markup and markdown.
  - Rule type which indicates the rules which should be executed to determine whether the markup or markdown calculation line is eligible for billing.
  - How the system should interpret the value stored in the pricing arrangement price item parameter (i.e. whether the value means the ancillary charge should be a pass through charge without markup or markdown, pass through charge with markup or markdown, or rate based charge with or without markup or markdown). Accordingly, the system will search for the pricing in the effective ancillary pricing rule where:
    - Billable charge line type matches the one specified in the ancillary transaction
    - Line defined for the billable charge line type has the pricing arrangement as mentioned in the ancillary transaction
  - Line item which indicates the SQI using which the ancillary charge should be created. You need to specify the line item for each pricing arrangement which is defined in the ancillary pricing rule type.

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

- Price item for which you want to define the pricing.
- Pricing date range during which the pricing is effective.
- Rate option which you want to use while defining the ancillary pricing.
- Whether you want to define the pricing for a pass through charge without markup or markdown. If you select the **Pass Through without Markup or Markdown** option, you cannot define the pricing for a pass through charge with markup or markdown and the pricing for rate based charge with or without markup or markdown in the ancillary pricing rule. However, if the **Pass Through without Markup or Markdown** option is not selected, you can define pricing for different billable charge line types which can be with markup or markdown or which can be rate based with or without markup or markdown. In addition, if the **Pass Through without Markup or Markdown** option is not selected, by default, the system will define the pricing for a pass through charge without markup or markdown. Depending on the billable charge line type and pricing arrangement information in the ancillary transaction, the system will accordingly fetch the appropriate pricing for billing the ancillary charge. For example, if the ancillary transaction contains BCLT1 as the billable charge line type and PASSMK as the pricing arrangement and the effective ancillary pricing rule contains the following pricing:

Ancillary Pricing	Billable Charge Line Type	Pricing Arrangement	Rate	Pricing Strategy	Markup Amount	Markdown Amount
AP1	BCLT0	Pass Through with Markup or Markdown	-	Markup	$10	-

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Ancillary Pricing	Billable Charge Line Type	Pricing Arrangement	Rate	Pricing Strategy	Markup Amount	Markdown Amount
AP2	BCLT1	Pass Through with Markup or Markdown	-	Markdown	-	$5
AP3	BCLT2	Rate Based without Markup or Markdown	$5	-	-	-
AP4	BCLT3	Rate Based with Markup or Markdown	$5	Markup	$10	-
AP5	BCLT4	Rate Based with Markup or Markdown	$5	Markdown	-	$5
AP6	-	Pass Through without Markup or Markdown	-	-	-	-

In this case, the system will use the AP2 pricing defined in the ancillary pricing rule. The system will markdown the SQI with the specified amount (i.e. $5).

- Whether the billable charge line type is eligible for billing or not. Accordingly, the system will create billable charge for the ancillary transaction.

In addition, while defining an ancillary pricing rule for a bill group, you need to indicate the policy status for which the ancillary pricing rule is applicable. You can also specify a pricing group while defining an ancillary pricing rule for a bill group. Once an ancillary pricing rule is created, the system creates multiple price assignments in a price list and assigns the price list to the bill group.

Defining an Ancillary Pricing Rule Type

Prerequisites

To define an ancillary pricing rule type, you should have:

- Ancillary pricing rule type business object defined in the application.
- Ancillary pricing rule business object defined in the application.

Procedure

To define an ancillary pricing rule type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **P** and then click **Pricing Rule Type**.
   A sub-menu appears.
3. Click the **Add** option from the **Pricing Rule Type** sub-menu.

   The **Select Business Object** screen appears. It contains the following field:

Field Name	Field Description	Mandatory (Yes or No)
Pricing Rule Type Business Object	Used to indicate the business object using which you want to create an ancillary pricing rule type. The valid values are: • Aggregate Stop-Loss (ASL) Pricing Rule Type • Ancillary Pricing Rule Type • Claim Pricing Rule Type • Discount Arrangement Pricing Rule Type • Flat Fee Pricing Rule Type	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	• Level Funded (LF) Pricing Rule Type • Retention Type Claim Based Pricing Rule Type • Retention Type Enrollment Based Pricing Rule Type • Specific Stop-Loss (SSL) Pricing Rule Type **Note:** You must select the **Ancillary Pricing Rule Type** option from the **Pricing Rule Type Business Object** list while defining an ancillary pricing rule type.	

Tip: Alternatively, you can access this screen by clicking the **Add** button in the **Page Title** area of the **Pricing Rule Type** screen.

4. Select the **Ancillary Pricing Rule Type** option from the **Pricing Rule Type Business Object** list.
5. Click **OK**.

The **Ancillary Pricing Rule Type** screen appears. It contains the following sections:

- **Main** - Used to specify the basic details about the ancillary pricing rule type.
- **Related Pricing Rule Types** - Used to indicate the non-primary pricing rule types which should inherit the transaction field mapping details from the ancillary pricing rule type. You can add a pricing rule type which belongs to the following category:

  a. Specific Stop Loss
  b. Aggregate Stop Loss
  c. Level Funding

  Note: You can use any of the above specified pricing rule types as the related pricing rule type in an ancillary pricing rule type.
- **Transaction Field Mapping** - Used to map the transaction fields in a ancillary transaction to the appropriate fields in the ancillary pricing rule type. This helps the system to determine the field where the data from the transaction field must be stored. This data is then used in the system for various reasons, such as for deriving a bill group and pricing, deriving an effective related pricing rule, and so on.

  Note: The **Billing Eligibility Identifier** field is required when you are defining the **Transaction Field Mapping** for an ancillary pricing rule type.
- **Algorithms** - Used to associate the algorithms with an ancillary pricing rule type.
- **Additional Data** - Used to specify additional information about the ancillary pricing rule type.
- **Price Items** - Used to add the price items for which you can define the ancillary pricing rules using the ancillary pricing rule type.
- **Price Item Parameters** - Used to add the price item parameters based on which you want to define the price item pricing.

  Note: There are two price item parameters that are mandatory in the ancillary pricing rule type:
  - A price item which stores the billable charge line type from the ancillary transaction.
  - A price item which stores the pricing arrangement from the ancillary transaction.
- **Characteristics** - Used to define the characteristics for an ancillary pricing rule type.
- **Ancillary-Specific Additional Data** - Used to define the ancillary-specific additional data in an ancillary pricing rule type.

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> **Note:** Following fields are required when you are defining the **Ancillary-Specific Additional Data** for the ancillary pricing rule type.
>
> - **Billing Eligibility Identifier Value**
> - **Billing Non-Eligibility Identifier Value**

- **Pricing Arrangements** - Used to define the following pricing arrangements that are used while defining an ancillary pricing rule type.
  - **Pass Through (Markup or Markdown Optional)**
  - **Pass Through Without Markup or Markdown**
  - **Rate Based (Markup or Markdown Optional)**

The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Pricing Rule Type	Used to specify the ancillary pricing rule type.	Yes
Description	Used to specify the description for the ancillary pricing rule type.	Yes
Detailed Description	Used to specify additional information about the ancillary pricing rule type.	No
Pricing Rule Business Object	Used to indicate the business object using which you want to create the ancillary pricing rule. The valid values are: • Aggregate Stop-Loss (ASL) Pricing Rule • Ancillary Pricing Rule • Claim Pricing Rule • Discount Arrangement Pricing Rule • Flat Fee Pricing Rule • Level Funded (LF) Pricing Rule • Retention Type Claim Based Pricing Rule • Retention Type Enrollment Based Pricing Rule • Specific Stop-Loss (SSL) Pricing Rule **Note:** You must select the **Ancillary Pricing Rule** option from the **Pricing Rule Business Object** list while defining an ancillary pricing rule type.	Yes
Business Object	Indicates the business object using which you are defining the ancillary pricing rule type.	Not applicable
Status	Used to indicate the status of the ancillary pricing rule type. The valid values are: • Active • Inactive	Yes
Primary	Used to indicate whether the ancillary pricing rule type is a primary pricing rule type.	No
Pricing Rule Type Category	Used to indicate the category to which the ancillary pricing rule type belongs. The valid value are: • Aggregate Stop-Loss • Ancillary	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	• Claim • Discount Arrangement • Flat Fees • Level Funded • Retention Type Claim Based • Retention Type Enrollment Based • Specific Stop-Loss **Note:** You must select the **Ancillary** option from the **Pricing Rule Type Category** list while defining an ancillary pricing rule type.	

6. Enter the required details in the **Main** section.
7. Select the **Ancillary Pricing Rule** option from the **Pricing Rule Business Object** list.
8. Select the **Primary** option in the **Main** section.
   The **Related Pricing Rule Types** and **Transaction Field Mapping** sections appear.
9. Select the **Ancillary** option from the **Pricing Rule Type Category** list.
10. Add the related pricing rule types in the ancillary pricing rule type, if required.
11. Map the transaction fields of an ancillary transaction to the appropriate fields in the ancillary pricing rule type.
12. Associate the following algorithms with the ancillary pricing rule type:

System Event	Algorithm	Algorithm Type	Description
Bill Group Derivation	C1_TXNBGDRV	C1_TXNBGDRV	Derive Bill Group
Account and Price Item Derivation	C1_ACCPRIDRV	C1_ACCPRIDRV	Account and Price Item Derivation
Bill After Date Determination	C1_BAFTDRV	C1_BAFTDRV	Bill After Date Determination

13. Define additional data for an ancillary pricing rule type, if required.
14. Add the required price items for which you can define ancillary pricing rules using the ancillary pricing rule type.
15. Add the price item parameters based on which you want to define the ancillary pricing, if required.
16. Define the characteristics for an ancillary pricing rule type, if required.
17. Define the required ancillary-specific additional data in the ancillary pricing rule type.
18. Define the pricing arrangements for an ancillary pricing rule type, if required.
19. Click **Save**.
    The ancillary pricing rule type is defined.

Related Topics

For more information on...	See...
How to add the related pricing rule types in the primary pricing rule type	Adding Related Pricing Rule Types in a Primary Pricing Rule Type on page 2959
How to define the transaction field mapping in the primary pricing rule type	Defining Transaction Field Mapping in a Primary Pricing Rule Type on page 2961
How to associate algorithms with the pricing rule type	Associating Algorithms with a Pricing Rule Type on page 2967

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For more information on...	See...
How to define additional data for the pricing rule type	Defining Additional Data for a Pricing Rule Type on page 2969
How to add pricing items in the pricing rule type	Adding Price Items in a Pricing Rule Type on page 2971
How to add price item parameters in the pricing rule type	Adding a Price Item Parameter in a Pricing Rule Type on page 2973
How to define a characteristic for the pricing rule type	Defining a Characteristic for a Pricing Rule Type on page 2975
How to define ancillary-specific data in the pricing rule type	Defining the Ancillary-Specific Data in an Ancillary Pricing Rule Type on page 3189
How to define pricing arrangements for the pricing rule type	Defining Pricing Arrangements in an Ancillary Pricing Rule Type on page 3191

Adding a Related Pricing Rule Type in an Ancillary Pricing Rule Type

The **Administrative Services Only (ASO)** feature is designed in such a way that all non-primary pricing rule types should inherit the transaction field mapping details from a primary pricing rule type. These non-primary pricing rule types are added in a primary pricing rule type as the related pricing rule types.

Prerequisites

To add related pricing rule types in an ancillary pricing rule type, you should have:

- Aggregate Stop Loss pricing rule type defined in the application.
- Specific Stop Loss pricing rule type defined in the application.
- Level Funding pricing rule type defined in the application.
- Rule types defined in the application (where the rule type usage is set to **Related Pricing Rule Type Eligibility**)

Procedure

To add related pricing rule type in an ancillary pricing rule type:

1. Ensure that the **Related Pricing Rule Types** section is expanded when you are defining or editing an ancillary pricing rule type.

   Note: The **Related Pricing Rule Types** section appears when the **Primary** option is selected in the **Main** section.

   The **Related Pricing Rule Types** section contains the following columns in a grid:

Column Name	Column Description	Mandatory (Yes or No)
Sequence	Used to specify the order in which the related pricing rule type should be invoked.	Yes (Conditional) **Note:** This field is required when you are adding a related pricing rule type in the ancillary pricing rule type.
Pricing Rule Type	Used to indicate the non-primary pricing rule type which should inherit the transaction field mapping details from the claim pricing	Yes (Conditional)

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Column Name	Column Description	Mandatory (Yes or No)
	rule type. You can add a non-primary pricing rule type of the following categories in the claim pricing rule type: **a.** Retention Type Claim Based **b.** Discount Arrangement **c.** Specific Stop-Loss **d.** Aggregate Stop-Loss **e.** Level Funding	**Note:** This field is required when the corresponding **Sequence** field is specified for the related pricing rule type.
	Note: We recommend you to add the required related pricing rule types in the above specified sequence. Otherwise, erroneous results might occur. The **Search** (🔍) icon appears corresponding to the **Pricing Rule Type** field.. On clicking the **Search** (🔍) icon corresponding to the **Pricing Rule Type** field, the **Pricing Rule Type Search** window appears. On specifying the pricing rule type, the description of the pricing rule type appears corresponding to the **Pricing Rule Type** field.	
Eligibility Rule Type	Used to specify the rule type which indicates the rules that should be executed to determine whether the related pricing rule type is eligible for deriving the transaction legs.	No
	Note: The list includes only those rule types where the rule type usage is set to **Related Pricing Rule Type Eligibility**.	

2. Enter the required details in the **Related Pricing Rule Types** section.
3. If you want to define more than one related pricing rule type for the ancillary pricing rule type, click the **Add** (+) icon and then repeat step 2.

> **Note:** However, if you want to remove a related pricing rule type from the ancillary pricing rule type, click the **Delete** (🗑) icon corresponding to the related pricing rule type.

4. Click **Save**.
   The related pricing rule type is added in the ancillary pricing rule type.

Related Topics

For more information on...	See...
How to define an ancillary pricing rule type	Defining an Ancillary Pricing Rule Type on page 3171
How to edit an ancillary pricing rule type	Editing an Ancillary Pricing Rule Type on page 3193

Mapping the Transaction Field in an Ancillary Pricing Rule Type

Prerequisites

To map the transaction field mapping for an ancillary pricing rule type, you should have:

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- Transaction fields defined in the application

Procedure

To map the transaction field mapping for an ancillary pricing rule type:

1. Ensure that the **Transaction Field Mapping** section is expanded when you are *d*efining an ancillary pricing rule type.

> **Note:**
> This section appears when you have chosen the **Primary** option from the **Main** section.

The **Transaction Field Mapping** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Source System	Used to map to a transaction field which indicates the external system from where the ancillary transaction is received. The information stored in this field is then used for deriving the bill group, parent customer, and policy for the ancillary transaction.	Yes
Parameter 1	Used to map to a transaction field which indicates the employee attribute based on which you want to derive the bill group.	Yes
Parameter 2	Used to map to a transaction field which indicates the employee attribute based on which you want to derive the bill group.	Yes (Conditional) **Note:** This field is required when you want to derive the bill group using multiple employee attributes.
Parameter 3	Used to map to a transaction field which indicates the employee attribute based on which you want to derive the bill group.	Yes (Conditional) **Note:** This field is required when you want to derive the bill group using multiple employee attributes.
Parameter 4	Used to map to a transaction field which indicates the employee attribute based on which you want to derive the bill group.	Yes (Conditional) **Note:** This field is required when you want to derive the bill group using multiple employee attributes.
Incurred Date	Used to map to a transaction field which contains the date when the health insurance service was availed by the employee.	Yes (Conditional) **Note:** This field is required when you want to fetch an effective specific stop-loss or aggregate stop-loss pricing rule for the claim transaction.
Paid Date	Used to map to a transaction field which contains the date when the claim amount was paid to the employee.	Yes (Conditional)

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Field Name	Field Description	Mandatory (Yes or No)
		Note: This field is required when you want to fetch an effective specific stop-loss or aggregate stop-loss pricing rule for the ancillary transaction.
Source of Funds	Used to map to a transaction field which indicates the source of funding. At present, this field is not used in the system.	No
Composite	Used to map to a transaction field which indicates whether the employee is covered under the composite insurance.	No
Claim Disposition	Used to map to a transaction field which helps to determine how the claim based fees should be charged for the positive and negative claim transactions.	Yes (Conditional) **Note:** This field is required while calculating the retention type claim based fees for the claim transaction.
Provider's Tax Identification Number	Used to map to a transaction field which states the health insurance provider's identification number. The information stored in this field is then used to determine whether the health insurance provider is excluded from the specific stop-loss coverage.	Yes (Conditional) **Note:** This field is required while calculating specific stop-loss for the ancillary transaction.
Member ID	Used to map to a transaction field which states the member's identification number. The information stored in this field is then used to determine whether the member is excluded from the specific stop-loss coverage.	Yes (Conditional) **Note:** This field is required while calculating specific stop-loss for the ancillary transaction.
Main Subscriber ID	Used to map to a transaction field which states the main subscriber's identification number. The information stored in this field is then used to determine whether the main subscriber is excluded from the specific stop-loss coverage.	Yes (Conditional) **Note:** This field is required while calculating specific stop-loss for the ancillary transaction.
Run-in Identifier	Used to map to a transaction field which indicates whether the ancillary transaction is a run-in ancillary transaction.	Yes (Conditional) **Note:** This field is required while defining a ancillary pricing rule type.
Runout Identifier	Used to map to a transaction field which indicates whether the ancillary transaction is a runout ancillary transaction. At present, this field is not used in the system.	No
Third Party Identifier	Used to specify the third party identifier to determine that the ancillary transaction is received from an external	No

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Field Name	Field Description	Mandatory (Yes or No)
	source system while defining an ancillary pricing rule type.	
Coverage Start Date	Used to map to a transaction field which indicates the coverage start date. The information stored in this field is then used to fetch an effective retention type enrollment based pricing rule for a non-retroactive enrollment transaction.	Yes (Conditional) **Note:** This field is required while defining a retention type enrollment based pricing rule type.
Coverage End Date	Used to map to a transaction field which indicates the coverage end date. The information stored in this field is then used to fetch an effective retention type enrollment based pricing rule for a retroactive enrollment transaction.	Yes (Conditional) **Note:** This field is required while defining a retention type enrollment based pricing rule type.
Retroactivity Indicator	Used to map to a transaction field which indicates whether the enrollment transaction is a retroactive enrollment transaction.	Yes (Conditional) **Note:** This field is required while defining a retention type enrollment based pricing rule type.
Network Indicator	Used to map to a transaction field which indicates whether the service provider is in network or out of network.	Yes (Conditional) **Note:** This field is required while defining a discount arrangement pricing rule.
Covered Charge Amount	Used to map to a transaction field which indicates the amount which is covered for the employee in the policy.	Yes (Conditional) **Note:** This field is required while calculating the discount using a discount guarantee pricing rule.
Discount Savings Amount	Used to map to a transaction field which indicates the amount which is offered as the discount to the service provider.	Yes (Conditional) **Note:** This field is required while calculating the discount using a discount guarantee or discount share pricing rule.
Accumulation Only Identifier	Used to map to a transaction field which indicates that the ancillary transaction should only be used for calculating charges for the accumulated products, such as Specific Stop-Loss, Aggregate Stop-Loss, and so on. This means that the system should not derive the ancillary transaction leg. Instead, it should only derive the specific stop-loss or aggregate stop loss transaction legs for the ancillary transaction.	No

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Field Name	Field Description	Mandatory (Yes or No)
Billing Eligibility Identifier	Used to map to a transaction field which indicates whether the ancillary transaction is eligible for billing.	Yes (Conditional) **Note:** This field is required while defining an ancillary pricing rule type.
Transaction Upload Date	Used to map to a transaction field which indicates the date when the transaction was uploaded in the external system. The system does not derive the discount transaction leg when the transaction upload date is later than the settlement date.	Yes (Conditional) **Note:** This field is required while calculating the discount using a discount guarantee or discount share pricing rule.

Note:

The **Search** (🔍) icon appears corresponding to each field. On clicking the **Search** icon, the **Transaction Field Search** window appears.

On specifying the transaction field, the description of the transaction field appears corresponding to the respective field.

2. Enter the required details in the **Transaction Field Mapping** section.
3. Click **Save**.
   The transaction fields are mapped to the appropriate fields in the claim pricing rule type.

Related Topics

For more information on...	See...
How to define an ancillary pricing rule type	Defining an Ancillary Pricing Rule Type on page 3171
How to edit an ancillary pricing rule type	Editing an Ancillary Pricing Rule Type on page 3193

Associating an Algorithm with an Ancillary Pricing Rule Type

Prerequisites

To associate algorithms with an ancillary pricing rule type, you should have:

- Algorithms defined using the **C1_TXNBGDRV**, **C1_ACCPRIDRV**, and **C1_BAFTDRV** algorithm types.

Procedure

To associate an algorithm with an ancillary pricing rule type:

1. Ensure that the **Algorithms** section is expanded when you are defining or editing an ancillary pricing rule type.

   The **Algorithms** section contains the following columns in a grid:

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Column Name	Column Description	Mandatory (Yes or No)
System Event	Used to indicate the system event when you want to invoke the algorithm. The valid values are: • **Account and Price Item Derivation** - Used to derive the account and price item for the ancillary transaction. • **Accumulation Billable Charge Post Proc** - Used to introduce a custom logic after creating discount share or discount guarantee billable charges. This algorithm is invoked in the **C1-BCDA (Create Billable Charge for Discount)** batch. • **Accumulation Billable Charge Pre Proc** - Used to introduce a custom logic before creating discount share or discount guarantee billable charges. This algorithm is invoked in the **C1-BCDA (Create Billable Charge for Discount)** batch. • **Accumulation Post Processing** - Used to introduce a custom logic after accumulating the discount share or discount guarantee amount. This algorithm is invoked in the **C1-ACDA (Accumulate Discount Arrangement)** batch. • **Accumulation Pre Processing** - Used to introduce a custom logic before accumulating the discount share or discount guarantee amount. This algorithm is invoked in the **C1-ACDA (Accumulate Discount Arrangement)** batch. • **Bill After Date Determination** - Used to determine the bill after date for the ancillary transaction. • **Bill Group Derivation** - Used to derive the bill group, parent customer, and policy for the ancillary transaction. • **Pricing Rule Post Processing** - Used to introduce a custom logic once the effective ancillary pricing rule is derived for the ancillary transaction. • **Transaction Validation** - Used to introduce a custom validation for the ancillary transaction. **Note:** You must specify **Account and Price Item Derivation** and **Bill Group Derivation** algorithms when you are associating the algorithms with an ancillary pricing rule type.	Yes **Note:** This field is required when you are associating an algorithm with the ancillary pricing rule type.
Sequence	Used to specify the order in which the algorithms with the same system event should be executed.	Yes (Conditional) **Note:** This field is required when you are associating an algorithm with the ancillary pricing rule type.
Algorithm	Used to indicate the algorithm that you want to execute on the system event.	Yes (Conditional)

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Column Name	Column Description	Mandatory (Yes or No)
	Note: Once you select the system event, the **Search** (🔍) icon appears corresponding to the **Algorithm** field. On clicking the **Search** (🔍) icon, the **Algorithm Search** window appears. On specifying the algorithm, the description of the algorithm appears corresponding to the **Algorithm** field.	**Note:** This field is required when you are associating an algorithm with the ancillary pricing rule type.

2. Enter the required details in the **Algorithms** section:

System Event	Algorithm	Mandatory (Yes or No)	For more information, see...
Account and Price Item Derivation	C1_ACCPRIDRV	Yes	Account and Price Item Derivation (for the Claim Pricing Rule Type Category) on page 3325
Accumulation Billable Charge Post Proc	- **Note:** An accumulation billable charge post processing algorithm type is not shipped with the product. You can create a custom algorithm type, if required.	No	-
Accumulation Billable Charge Pre Proc	- **Note:** An accumulation billable charge pre processing algorithm type is not shipped with the product. You can create a custom algorithm type, if required.	No	-
Accumulation Post Processing	- **Note:** An accumulation post processing algorithm type is not shipped with the product. You can create a custom algorithm type, if required.	No	-
Accumulation Pre Processing	- **Note:** A accumulation pre processing algorithm type is not shipped with the product. You can create a custom algorithm type, if required.	No	-
Bill After Date Determination	C1_BAFTDRV	Yes	Bill After Date Determination on page 3362
Bill Group Derivation	C1_TXNBGDRV	Yes	Bill Group Derivation on page 3323

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System Event	Algorithm	Mandatory (Yes or No)	For more information, see...
Pricing Rule Post Processing	-	No	-
	Note: A pricing rule post processing algorithm type is not shipped with the product. You can create a custom algorithm type, if required.		
Transaction Validation	-	No	-
	Note: An algorithm type for validating an ancillary transaction is not shipped with the product. You can create a custom algorithm type, if required.		

3. If you want to associate more than one algorithm with an ancillary pricing rule type, click the **Add** (+) icon and then repeat step 2.

Note: However, if you want to remove an algorithm from the ancillary pricing rule type, click the **Delete** (🗑) icon corresponding to the algorithm.

4. Click **Save**.
The algorithms are associated with an ancillary pricing rule type.

Related Topics

For more information on...	See...
How to define an ancillary pricing rule type	Defining an Ancillary Pricing Rule Type on page 3171
How to edit an ancillary pricing rule type	Editing an Ancillary Pricing Rule Type on page 3193

Defining Additional Data in an Ancillary Pricing Rule Type

Procedure

To define additional data in an ancillary pricing rule type:

1. Ensure that the **Additional Data** section is expanded when you are defining *or* editing an ancillary pricing rule type.

Note: This section does not appear when the **Pricing Rule Type Category** is **Flat Fees**.

The **Additional Data** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Eligible for Specific Stop-Loss	Used to indicate whether the price items included in the ancillary pricing rule type are eligible for specific stop-loss. The valid values are: • Yes • No	No

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Field Name	Field Description	Mandatory (Yes or No)
	Note: This field appears when the **Pricing Rule Type Category** is either **Ancillary**, **Claim**, **Retention Type Claim Based**, or **Retention Type Enrollment Based**. If you do not specify the value for this field, by default, it is set to **No**	
Eligible for Level Funding	Used to indicate whether the price items included in the ancillary pricing rule type are eligible for level funding. The valid values are: • Yes • No	No
Run-in Identifier Value	Used to specify the identifier value to determine whether the ancillary transaction is received during the run-in period of the policy.	No
Third Party Identifier Value	Used to specify the identifier value to determine whether the ancillary transaction is received from an external source system.	No
Accumulation Only Identifier Value	Used to specify the value when received in an ancillary transaction indicates that the ancillary transaction should only be considered for calculating specific stop-loss and aggregate stop-loss. In such case, a transaction leg is not derived for the ancillary transaction.	No
Eligible for Write-Off in Post Runout	Used to indicate whether the pricing rule is eligible for Write-Off in Post Runout or not. The valid values are: • Yes • No For more information, refer to the Write-Off Charges during Post Runout section. **Note:** By default, the value is set to **No**.	No
Post Runout Write-Off Adjustment Type	Used to specify the adjustment type using which the post runout write-off adjustments must be created. **Note:** This field appears when the **Eligible for Write-Off in Post Runout** field is set to **Yes**. The **Search** (🔍) icon appears corresponding to the **Post Runout Write-Off Adjustment Type** field. On clicking the **Search** icon, the **Adjustment Type Search** window appears. On specifying the adjustment type, the description of the adjustment type appears corresponding to the **Eligible for Write-Off in Post Runout** field.	Yes (Conditional) **Note:** This field is required when the **Eligible for Write-Off in Post Runout** field is set to **Yes**.

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Field Name	Field Description	Mandatory (Yes or No)
Rule Based Price Item Eligibility Field	Used to indicate the transaction field which you want to use in the rules as the output parameter to determine whether the price item should be considered for billing. For more information, refer to the Price Item Eligibility on page 3315. **Note:** This field appears when the **Eligible for Write-Off in Post Runout** field is set to **Yes**. The **Search** (🔍) icon appears corresponding to the **Rule Based Price Item Eligibility Field** field. On clicking the **Search** icon, the **Field Search** window appears. On specifying the field name, the description of the field name appears corresponding to the **Rule Based Price Item Eligibility Field**.	No
Rule Based Related Pricing Rule Type Eligibility Field	Used to indicate the transaction field which you want to use in the rules as the output parameter to determine whether the related pricing rule type should be considered for deriving the transaction legs. For more information, refer to Related Pricing Rule Type Eligibility on page 3314. **Note:** The **Search** (🔍) icon appears corresponding to the **Rule Based Related Pricing Rule Type Eligibility Field** field. On clicking the **Search** icon, the **Field Search** window appears. On specifying the field, the description of the field appears corresponding to the **Rule Based Related Pricing Rule Type Eligibility Field** field.	No
Rule Based Eligibility Value	Used to specify the value which the output parameter in the rule should return when the price item and related pricing rule type in the ancillary pricing rule type should be considered for processing.	Yes (Conditional) **Note:** This field is required when a value is specified in the **Rule Based Price Item Eligibility Field** or **Rule Based Related Pricing Rule Type Eligibility Field** field.

2. Enter the required details in the **Additional Data** section.
3. Click **Save**.
   The additional data is defined in the ancillary pricing rule type.

Related Topics

For more information on...	See...
How to define an ancillary pricing rule type	Defining an Ancillary Pricing Rule Type on page 3171

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For more information on...	See...
How to edit an ancillary pricing rule type	Editing an Ancillary Pricing Rule Type on page 3193

Adding a Price Item in an Ancillary Pricing Rule Type

Prerequisites

To add a price item in an ancillary pricing rule type, you should have:

- Price item defined in the application
- Rate options defined in the **Rate Option (C1-ExtLookRetTypeRateOpt)** extendable lookup
- Values defined for the **Invoice Type (C1INVTYP)** characteristic type
- The **C1INVTYP** characteristic type set in the **Invoice Type Characteristic Type** option type of the **C1-ASOBLLNG** feature configuration
- Rule types defined in the application (where the rule type usage is set to **Price Item Eligibility**)

Procedure

To add a price item in an ancillary pricing rule type:

1. Ensure that the **Price Items** section is expanded when you are defining *or* editing an ancillary pricing rule type.

   The **Price Items** section contains the following fields in a grid:

<table>
<tr><th>Field Name</th><th>Field Description</th><th>Mandatory (Yes or No)</th></tr>
<tr><td rowspan="3">Price Item</td><td>Used to indicate the price item that you want to include in an ancillary pricing rule type.</td><td>Yes (Conditional)</td></tr>
<tr><td>Note:
The Search (🔍) icon appears corresponding to the Price Item field. On clicking the Search (🔍) icon, the Price Item Search window appears.
On specifying the price item, the description of the price item appears corresponding to the Price Items field.</td><td>Note: This field is required when you are adding a rate option and bill to account in the discount arrangement pricing rule type.</td></tr>
<tr><td></td><td></td></tr>
<tr><td>Rate Option</td><td>Used to indicate one or more rate options which are valid for a price item.
On clicking the Add (📄) icon, the following field appears in a grid:
<table>
<tr><th>Field Name</th><th>Field Description</th><th>Mandatory (Yes or No)</th></tr>
<tr><td>Rate Option</td><td>Used to indicate the rate option that you want to use while defining pricing for the price item.</td><td>Yes</td></tr>
</table>
Note:
If you want to define more than one rate option to the price item in an ancillary pricing rule type, click the Add (+) icon.
However, if you want to remove a price item from an ancillary pricing rule type, click the Delete (🗑) icon corresponding to the Rate Option field.</td><td>Not applicable</td></tr>
</table>

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<table>
<tr><th>Field Name</th><th>Field Description</th><th>Mandatory (Yes or No)</th></tr>
<tr><td>Bill To Account</td><td>Used to indicate a order in which the account should be considered while deriving a transaction leg.

On clicking the Add (+) icon, the following fields appear in a grid:

<table>
<tr><th>Field Name</th><th>Field Description</th><th>Mandatory (Yes or No)</th></tr>
<tr><td>Priority</td><td>Used to specify the order in which the invoice type is considered for a price item.</td><td>Yes</td></tr>
<tr><td>Invoice Type</td><td>Used to indicate the type which is considered for billing. For more information, refer to the Bill Group's Account on page 13 section.

Note: The Search (🔍) icon appears corresponding to the Invoice Type field. On clicking the Search icon, the Invoice Type Search window appears.</td><td>Yes</td></tr>
</table>

Note:

If you want to define more than one invoice type to the price item in an ancillary pricing rule type, click the Add (+) icon.

However, if you want to remove a invoice type from the price item in an ancillary pricing rule type, click the Delete (🗑) icon corresponding to the Priority field.</td><td>Not applicable</td></tr>
<tr><td>Eligibility Rule Type</td><td>Used to indicate the rule type which indicates the rules that should be executed to determine whether the price item is eligible for billing.</td><td>No</td></tr>
</table>

2. Enter the required details in the **Price Items** section.
3. If you want to define more than one price item for an ancillary pricing rule type, click the **Add** (+) icon and then repeat step 2.

Note: However, if you want to remove a price item from an ancillary pricing rule type, click the **Delete** (🗑) icon corresponding to the price item.

4. Click **Save**.
   The price items are added for an ancillary pricing rule type.

Related Topics

For more information on...	See...
How to define an ancillary pricing rule type	Defining an Ancillary Pricing Rule Type on page 3171
How to edit an ancillary pricing rule type	Editing an Ancillary Pricing Rule Type on page 3193

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Adding a Price Item Parameter in an Ancillary Pricing Rule Type

Prerequisites

To add a price item parameter in an ancillary pricing rule type, you should have:

- Parameters defined in the application where parameter usage is set to **Price Item**.
- Parameters associated with the price item.
- **Billable Charge Line Type Parameter** and **Pricing Arrangement Parameter** defined in the application.
- **Billable Charge Line Type Parameter** and **Pricing Arrangement Parameter** set as option types in the **C1-ASOBLLNG** feature configuration.
- Transaction fields defined in the application.

Procedure

To add a price item parameter in an ancillary pricing rule type:

1. Ensure that the **Price Item Parameters** section is expanded when you are defining or editing an ancillary pricing rule type.

   The **Price Item Parameters** section contains the following fields in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Price Item Parameter	Used to specify the parameter which you can use while defining an ancillary pricing for the price item. **Note:** The **Search** (🔍) icon appears corresponding to the **Price Item Parameter** field. On clicking the **Search** (🔍) icon corresponding to the **Price Item Parameter** field, the **Parameter Search** window appears. On specifying the parameter, the description of the price item parameter appears corresponding to the **Price Item Parameter** field.	Yes (Conditional) **Note:** This field is required while adding a price item parameter in an ancillary pricing rule type.
Transaction Field	Used to map to a transaction field which contains the parameter value. **Note:** The **Search** (🔍) icon appears corresponding to the **Transaction Field** field. On clicking the **Search** (🔍) icon corresponding to the **Transaction Field** field, the **Transaction Field Search** window appears. On specifying the transaction field, the description of the transaction field appears corresponding to the **Transaction Field**.	Yes (Conditional) **Note:** This field is required while adding a price item parameter in an ancillary pricing rule type.
Eligible for Specific Stop-Loss	Used to indicate whether the price item parameter can be used while defining the accumulation criteria in the specific stop-loss or aggregate stop-loss pricing rules at the bill group level.	No
Eligible for Level Funding	Used to indicate whether the price item parameter can be used while defining the accumulation criteria in the level funding pricing rules at the bill group level.	No

2. Enter the required details in the **Price Item Parameters** section.

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3. If you want to add more than one price item parameter for an ancillary pricing rule type, click the **Add** (+) icon and then repeat step 2.

> **Note:** However, if you want to remove a price item parameter from an ancillary pricing rule type, click the **Delete** (🗑) icon corresponding to the price item parameter.

4. Click **Save**.
   The price item parameter is added in the ancillary pricing rule type.

Related Topics

For more information on...	See...
How to define an ancillary pricing rule type	Defining an Ancillary Pricing Rule Type on page 3171
How to edit an ancillary pricing rule type	Editing an Ancillary Pricing Rule Type on page 3193

Defining the Ancillary-Specific Data in an Ancillary Pricing Rule Type

Procedure

To add the ancillary-specific additional data in an ancillary pricing rule type:

1. Ensure that the **Ancillary-Specific Additional Data** section is expanded when you are defining *or* editing an ancillary pricing rule type.

   The **Ancillary-Specific Additional Data** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Billing Eligibility Identifier Value	Used to specify the billing eligibility identifiers which help to determine whether the ancillary transaction is eligible for billing.	Yes (Conditional) **Note:** This field is required when you are adding the ancillary-specific additional data.
Billing Non-Eligibility Identifier Value	Used to specify the billing non-eligibility identifiers which help to determine whether the ancillary transaction is eligible for billing.	Yes (Conditional) **Note:** This field is required when you are adding the ancillary-specific additional data.
Rule Based Markup or Markdown Eligibility Field	Used to specify the transaction field that you want to use in the rules as the output parameter to determine whether	Yes (Conditional)

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Field Name	Field Description	Mandatory (Yes or No)
	the markup or markdown calculation line is eligible for billing. **Note:** On clicking the **Search** (🔍) icon corresponding to the **Rule Based Markup or Markdown Eligibility Field** field, the **Field Search** window appears. On specifying the field, the description of the field appears corresponding to the **Rule Based Markup or Markdown Eligibility Field** field.	**Note:** This field is required when the Markup or Markdown Eligibility Rule Type field is specified.
Markup or Markdown Billable Charge Line Type	Used to specify the billable charge line type using which you want to create the billable charges for markup and markdown. **Note:** On clicking the **Search** (🔍) icon corresponding to the **Markup or Markdown Billable Charge Line Type** field, the **Billable Charge Line Type Search** window appears. On specifying the billable charge line type, the description of the billable charge line type appears corresponding to the **Markup or Markdown Billable Charge Line Type** field.	No
Markup or Markdown Eligibility Rule Type	Used to specify the markup or markdown eligibility rule type for the ancillary pricing rule type. The valid values are: • Rule 1 **Note:** The **Markup or Markdown Eligibility Rule Type** list includes only those rule-types where the rule type eligibility is **ASO Billing Mark Up / Down Eligibility**.	No

2. Enter the required details in the **Ancillary-Specific Additional Data** section.
3. Define pricing arrangements for ancillary-specific data in the **Ancillary-Specific Additional Data** section.
4. Click **Save**.
   The ancillary-specific additional data is added in the ancillary pricing rule type.

Related Topics

For more information on...	See...
How to define an ancillary pricing rule type	Defining an Ancillary Pricing Rule Type on page 3171
How to edit an ancillary pricing rule type	Editing an Ancillary Pricing Rule Type on page 3193
How to define pricing arrangements in an ancillary pricing rule type	Defining Pricing Arrangements in an Ancillary Pricing Rule Type on page 3191

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Defining Pricing Arrangements in an Ancillary Pricing Rule Type

Prerequisites

To define pricing arrangements in an ancillary pricing rule type, you should have:

- Line Items where category is set to **Ancillary**, as defined in the application.

Procedure

To add pricing arrangements in an ancillary pricing rule type:

1. Ensure that the **Ancillary-Specific Data** and **Pricing Arrangements** section is expanded when you are *d*efining or editing a pricing rule type.

   The **Pricing Arrangements** section contains the following columns in a grid:

Column Name	Column Description	Mandatory (Yes or No)
Pricing Arrangement Identifier	Used to indicate the pricing arrangement identifier that you can define through an ancillary pricing rule type. The valid values are: • Pass Through (Markup or Markdown Optional) • Pass Through without Markup or Markdown • Rate Based (Markup or Markdown Optional)	Yes (Conditional) **Note:** This field is required when you are defining pricing arrangements for an ancillary pricing rule type.
Pricing Arrangement Identifier Value	Used to specify the value for the pricing arrangement identifier. The valid values are: • Pass Through (Markup or Markdown Optional) • Pass Through without Markup or Markdown • Rate Based (Markup or Markdown Optional)	Yes (Conditional) **Note:** This field is required when you are defining pricing arrangements for an ancillary pricing rule type.
Line Item	Used to indicate the line item which using the billable charge is created for a pricing arrangement.	Yes (Conditional) **Note:** This field is required when you are defining pricing arrangements for an ancillary pricing rule type.

2. Enter the required details in the **Pricing Arrangements** section.
3. If you want to define more than one pricing arrangement in an ancillary pricing rule type, click the **Add** (+) icon and then repeat step 2.

   Note: However, if you want to remove a pricing arrangement from the ancillary pricing rule type, click the **Delete** (🗑) icon corresponding to the pricing arrangement identifier.

4. Click **Save**.
   The pricing arrangements are defined for the ancillary pricing rule type.

Related Topics

For more information on...	See...
How to define an ancillary pricing rule type	Defining an Ancillary Pricing Rule Type on page 3171
How to edit an ancillary pricing rule type	Editing an Ancillary Pricing Rule Type on page 3193

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Defining a Characteristic for a Ancillary Pricing Rule Type

Prerequisites

To define a characteristic for an ancillary pricing rule type, you should have:

- Characteristic types defined in the application (where the characteristic entity is set to **Pricing Rule Type**)

Procedure

To define a characteristic for an ancillary pricing rule type:

1. Ensure that the **Characteristics** section is expanded when you are defining an ancillary pricing rule type.

   The **Characteristics** section contains the following fields in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Characteristic Type	Used to indicate the characteristic type.	Yes (Conditional)
	Note: The list includes only those characteristic types where the characteristic entity is set to **Pricing Rule Type**.	**Note:** This field is required when you are defining a characteristic for an ancillary pricing rule type.
Characteristic Value	Used to specify the value for the characteristic type.	Yes (Conditional)
	Note: If you select a predefined characteristic type, the **Search** (🔍) icon appears corresponding to the **Characteristic Value** field. On clicking the **Search** icon, the **Predefined Characteristic Search** window appears. On specifying the value for a predefined characteristic type, the description of the characteristic value appears corresponding to the **Characteristic Value** field.	**Note:** This field is required when you are defining a characteristic for an ancillary pricing rule type.

2. Enter the required details in the **Characteristics** section.
3. If you want to define more than one characteristic for an ancillary pricing rule type, click the **Add** (+) icon and then repeat step 2.

   Note: However, if you want to remove a characteristic from an ancillary pricing rule type, click the **Delete** (🗑) icon corresponding to the characteristic.

4. Click **Save**.
   The characteristic is defined for an ancillary pricing rule type.

Related Topics

For more information on...	See...
How to define an ancillary pricing rule type	Defining an Ancillary Pricing Rule Type on page 3171
How to edit an ancillary pricing rule type	Editing an Ancillary Pricing Rule Type on page 3193

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Editing an Ancillary Pricing Rule Type

Prerequisites

To edit an ancillary pricing rule type, you should have:

- Ancillary pricing rule type business object defined in the application.
- Ancillary pricing rule business object defined in the application.

Procedure

To edit an ancillary pricing rule type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **P** and then click **Pricing Rule Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Pricing Rule Type** sub-menu.
   The **Pricing Rule Type** screen appears.
4. In the **Pricing Rule Type List** zone, click the **Edit** (✎) icon in the **Edit** column corresponding to an ancillary pricing rule type whose details you want to edit.

   The **Ancillary Pricing Rule Type** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details about the ancillary pricing rule type.
   - **Related Pricing Rule Types** - Used to indicate the non-primary pricing rule types which should inherit the transaction field mapping details from the ancillary pricing rule type. You can add a pricing rule type which belongs to the following category:

     a. Retention Type Claim Based
     b. Discount Arrangement
     c. Specific Stop-Loss
     d. Aggregate Stop-Loss
     e. Level Funding

     Note: We recommend you to add the required related pricing rule types in the above specified sequence. Otherwise, erroneous results might occur.

   - **Transaction Field Mapping** - Used to map the transaction fields in a claim transaction to the appropriate fields in the claim pricing rule type. This helps the system to determine the field where the data from the transaction field must be stored. This data is then used in the system for various reasons, such as for deriving a bill group and pricing, deriving an effective related pricing rule, and so on.

     Note: The **Billing Eligibility Identifier** field is required when you are defining the **Transaction Field Mapping** for the ancillary pricing rule type.

   - **Algorithms** - Used to associate the algorithms with the ancillary pricing rule type.
   - **Additional Data** - Used to specify the additional information about the ancillary pricing rule type.
   - **Price Items** - Used to add the price items for which you can define the ancillary pricing rules using the ancillary pricing rule type.
   - **Price Item Parameters** - Used to add the price item parameters based on which you want to define the price item pricing.

     Note: There are two price item parameters that are mandatory in the ancillary pricing rule type:

     - A price item which stores the billable charge line type from the ancillary transaction.
     - A price item which stores the pricing arrangement from the ancillary transaction.

   - **Characteristics** - Used to define the characteristics for the ancillary pricing rule type.

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- **Ancillary-Specific Additional Data** - Used to define ancillary-specific additional data.

  Note: Following fields are required when you are defining the **Ancillary-Specific Additional Data** for the ancillary pricing rule type.

  - **Billing Eligibility Identifier Value**
  - **Billing Non-Eligibility Identifier Value**

- **Pricing Arrangements** - Used to define the pricing arrangements for the ancillary pricing rule type.
  - **Pass Through (Markup or Markdown Optional)**
  - **Pass Through Without Markup or Markdown**
  - **Rate Based (Markup or Markdown Optional)**

The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Pricing Rule Type	Displays the ancillary pricing rule type.	Not applicable
Description	Used to specify the description for an ancillary pricing rule type.	Yes
Detailed Description	Used to specify additional information about the ancillary pricing rule type.	No
Pricing Rule Business Object	Used to indicate the business object using which you want to create an ancillary pricing rule. The valid value is: • Aggregate Stop-Loss (ASL) Pricing Rule • Ancillary Pricing Rule • Claim Pricing Rule • Discount Arrangement Pricing Rule • Flat Fee Pricing Rule • Level Funded (LF) Pricing Rule • Retention Type Claim Based Pricing Rule • Retention Type Enrollment Based Pricing Rule • Specific Stop-Loss (SSL) Pricing Rule **Note:** You must select the **Ancillary Pricing Rule** option from the **Pricing Rule Business Object** list while defining an ancillary pricing rule type.	Yes
Business Object	Indicates the ancillary pricing rule type business object using which you are defining the ancillary pricing rule type.	Not applicable
Status	Used to indicate the status of the ancillary pricing rule type. The valid values are: • Active • Inactive	Yes
Primary	Used to indicate whether the ancillary pricing rule type is a primary pricing rule type. **Note:** This field is disabled when you select the **Flat Fees** option from the **Pricing Rule Type Category** list.	No

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Field Name	Field Description	Mandatory (Yes or No)
Pricing Rule Type Category	Indicates the category to which the ancillary pricing rule type belongs. The valid values are: • Aggregate Stop-Loss • Ancillary • Claim • Discount Arrangement • Flat Fees • Level Funded • Retention Type Claim Based • Retention Type Enrollment Based • Specific Stop-Loss **Note:** You must select the **Ancillary** option from the **Pricing Rule Type Category** list while defining an ancillary pricing rule type.	No

Tip: Alternatively, you can edit the details of an ancillary pricing rule type by clicking the **Edit** button in the **Pricing Rule Type** zone to edit the pricing rule type for ancillary.

5. Modify the required details in the **Main** section, if required.
6. Ensure that the **Ancillary Pricing Rule** option is selected from the **Pricing Rule Business Object** list.
7. Ensure that the **Primary** option is selected in the **Main** section.
8. Add, edit, or remove the related pricing rule types in the ancillary pricing rule type, if required.

Note: The **Related Pricing Rule Types** section appears when the **Primary** option is selected from the **Main** section.

9. Modify the transaction field mapping in the ancillary pricing rule type, if required.

Note: The **Transaction Field Mapping** section appears when the **Primary** option is selected from the **Main** section.

10. Add, edit, or remove algorithms from the ancillary pricing rule type, if required.

System Event	Algorithm	Algorithm Type	Description
Account and Price Item Derivation	C1_ACCPRIDIS	C1_ACCPRIDIS	Account and Priceitem Derivation For Discount Arrangement

11. Edit generic additional data for the ancillary pricing rule type, if required.
12. Add, edit, or remove price items in an ancillary pricing rule type, if required.
13. Add, edit, or remove price item parameters in an ancillary pricing rule type, if required.
14. Add, edit, or remove characteristics in an ancillary pricing rule type, if required.
15. Modify the ancillary-specific data in an ancillary pricing rule type, if required.
16. Modify the pricing arrangements in an ancillary pricing rule type, if required.
17. Click **Save**.
    The changes made to the ancillary pricing rule type are saved.

Related Topics

For more information on...	See...
How to add related pricing rule type in an ancillary pricing rule type	Adding a Related Pricing Rule Type in an Ancillary Pricing Rule Type on page 3175

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For more information on...	See...
How to map the transaction fields in an ancillary pricing rule type	Mapping the Transaction Field in an Ancillary Pricing Rule Type on page 3176
How to associate an algorithm with an ancillary pricing rule type	Associating an Algorithm with an Ancillary Pricing Rule Type on page 3180
How to defining additional data in an ancillary pricing rule type	Defining Additional Data in an Ancillary Pricing Rule Type on page 3183
How to adding a price item in an ancillary pricing rule type	Adding a Price Item in an Ancillary Pricing Rule Type on page 3186
How to add a price item parameter in an ancillary pricing rule type	Adding a Price Item Parameter in an Ancillary Pricing Rule Type on page 3188
How to define the ancillary-specific data in an ancillary pricing rule type	Defining the Ancillary-Specific Data in an Ancillary Pricing Rule Type on page 3189
How to define pricing arrangements in an ancillary pricing rule type	Defining Pricing Arrangements in an Ancillary Pricing Rule Type on page 3191

Deleting an Ancillary Pricing Rule Type

Procedure

To delete an ancillary pricing rule type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **P** and then click **Pricing Rule Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Pricing Rule Type** sub-menu.
   The **Pricing Rule Type** screen appears.
4. In the **Pricing Rule Type List** zone, click the **Delete** (🗑) icon in the **Delete** column corresponding *t*o the ancillary pricing rule type that you want to delete.
   A message appears confirming whether you want to delete the ancillary pricing rule type.

   Note: You can delete an ancillary pricing rule type when it is not yet used in the system.

   Tip: Alternatively, you can delete an ancillary pricing rule type by clicking the **Delete** button in the **Pricing Rule Type** zone.
5. Click **OK**.
   The ancillary pricing rule type is deleted.

Related Topics

For more information on...	See...
Pricing Rule Type screen	Pricing Rule Type on page 2942

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For more information on...	See...
Pricing Rule Type List zone	Pricing Rule Type List on page 2943
Pricing Rule Type zone	Pricing Rule Type on page 2946

Viewing the Ancillary Pricing Rule Type Details

Procedure

To view the details of an ancillary pricing rule type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **P** and then click **Pricing Rule Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Pricing Rule Type** sub-menu.
   The **Pricing Rule Type** screen appears.
4. In the **Pricing Rule Type List** zone, click the **Broadcast** (📡) icon corresponding to the ancillary pricing rule type whose details you want to view.
   The **Pricing Rule Type** zone appears.
5. View the details of the ancillary pricing rule type in the **Pricing Rule Type** zone.

Related Topics

For more information on...	See...
Pricing Rule Type screen	Pricing Rule Type on page 2942
Pricing Rule Type List zone	Pricing Rule Type List on page 2943
Pricing Rule Type zone	Pricing Rule Type on page 2946

Defining an Ancillary Pricing Rule for a Parent Customer

Prerequisites

To define an ancillary pricing rule for a parent customer, you should have:

- Pricing rule type where the category is set to **Ancillary**.
- Price items associated with the ancillary pricing rule type.
- Pricing arrangements defined in the ancillary pricing rule type.

Procedure

To define an ancillary pricing rule for a parent customer:

1. Search for a parent customer in the **Customer 360° View** screen.
2. In the **Search Results** section, click the **View** (🔗) icon corresponding to the parent customer *w*hose pricing details you want to view.
   The **Person** tab appears in the **Customer 360° Information** screen.
3. Click the **Pricing** tab.
   The **Pricing** tab appears.
4. Click the **Add** link in the upper right corner of the **Parent Customer Pricing Rules** zone.

   The **Pricing Rule** screen appears. It contains the following fields:

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Field Name	Field Description	Mandatory (Yes or No)
Person Name	Indicates the parent customer for whom you want to create an ancillary pricing rule type.	Not applicable
Person Type	Indicates the type of the parent customer. The valid value is: • Parent Customer **Note:** If you are defining the pricing rule type for the parent customer, then the person type will be **Parent Customer**.	Not applicable
Pricing Rule Type	Used to indicate the pricing rule type using which you want to create an ancillary pricing rule.	Yes

5. Select the required pricing rule type in the respective field.
6. Click **OK**.

The **Ancillary Pricing Rule** screen appears. It contains the following sections:

- **Customer Information** - Displays the information about the parent customer. It contains the following fields:

Field Name	Field Description
Parent Customer Information	Indicates the parent customer for whom you are defining an ancillary pricing rule.
Pricing Rule Type	Indicates the pricing rule type using which you are defining an ancillary pricing rule.

- **Main** - Used to specify basic details about the ancillary pricing rule. In addition it allows you to define pricing for different types of ancillary charges. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Price Item	Used to indicate the price item for which you want to define an ancillary pricing rule.	Yes
Pricing Start Date	Used to specify the date from when the ancillary pricing rule is effective. **Note:** The pricing start date cannot be later than the pricing end date.	Yes
Pricing End Date	Used to specify the date till when the ancillary pricing rule is effective. **Note:** The pricing end date cannot be earlier than the pricing start date.	No
Rate Option	Used to indicate the rate option that you want to use while defining pricing for the price item.	Yes
Pass Through without Markup or Markdown	Used when markup or markdown should not be calculated for the ancillary charge.	Yes (Conditional)

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Field Name	Field Description	Mandatory (Yes or No)
	Note: This field is enabled when the **Rate Option** field is selected.	**Note:** This field is required when you want to calculate the ancillary pricing without the pass through charge while defining the ancillary pricing rule.

The following fields appear when the **Pass Through without Markup or Markdown** option is not selected. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Billable Charge Line Type	Used to indicate the billable charge line type using which you want to create the ancillary pricing rule. **Note:** The Search (🔍) icon appears corresponding to this field. On clicking the **Search** icon, the **Billable Line Type Search** window appears. On specifying the billable charge line type, the description of the billable charge line type appears corresponding to the **Billable Charge Line Type** field.	Yes (Conditional) **Note:** This field is required while creating a pricing arrangement with or without rate based billable charge line type.
Billable	Used to indicate whether the ancillary charge is eligible for billing or not.	Yes (Conditional) **Note:** This field is required while creating a pricing arrangement with or without the **Markup or Markdown Type** field and the **Rate Based** option.
Rate Based	Used to indicate whether the ancillary charge is calculated using a particular rate.	Yes (Conditional) **Note:** This field is required while creating a pricing arrangement with the **Rate Based** option.
Rate	Used to indicate the rate for calculating the ancillary charge. **Note:** This field is enabled when the **Rate Based** option is selected.	Yes (Conditional) **Note:** This field is required when **Rate Based** option is selected.
Pricing Strategy	Used to indicate the price calculation strategy which should be applied while defining the ancillary pricing rule. The valid values are: • Markup • Markdown	No

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Field Name	Field Description	Mandatory (Yes or No)
	• None	
Markup or Markdown Type	Used to indicate the type of charge which should be applied while defining the ancillary pricing rule. The valid values are: • Flat Amount • Percentage **Note:** This field is enabled when the **Pricing Strategy** field is selected.	Yes (Conditional) **Note:** This field is required when the **Pricing Strategy** field is selected.
Amount / Percentage	Used to specify the actual proportion of the charge that should be applied while defining the ancillary pricing rule.	Yes (Conditional) **Note:** This field is required when the **Markup or Markdown Type** field is selected.

- **Characteristics** - Used to define the characteristics for an ancillary pricing rule.

7. Enter the required details in the **Main** section.
8. Define the characteristics for an ancillary pricing rule, if required.
9. Click **Save**.
   The ancillary pricing rule is defined for a parent customer.

Related Topics

For more information on...	See...
How to search for a parent customer	Searching for a Person on page 597
Parent Customer Pricing Rules zone	Parent Customer Pricing Rules on page 643
How to define a characteristic for an ancillary pricing rule	Defining a Characteristic for an Ancillary Pricing Rule on page 3201

Viewing an Ancillary Pricing Rule of a Parent Customer

Procedure

To view an ancillary pricing rule for a parent customer:

1. Search for a parent customer whose pricing details you want to view in the **Customer 360° View** screen.
2. In the **Search Results** section, click the **View** (🔗) icon corresponding to the parent customer whose pricing details you want to view.
   The **Person** tab appears in the **Customer 360° Information** screen.
3. Click the **Pricing** tab.
   The **Pricing** tab appears.
4. In the **Parent Customer Pricing Rules** zone, click the link in the **Pricing Rule Information** column corresponding to the pricing rule type whose details you want to view.

   The **Pricing Rule** screen appears. It contains the following zone:

   - **Ancillary** - Displays Ancillary Pricing Rule of a Parent Customer. It contains the following sections:
     - **Main** - Displays the basic details of the ancillary pricing rule of a parent customer.

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- **Ancillary Charger** - Displays the ancillary charges defined for an ancillary pricing rule of a parent customer.
- **Characteristics** - Displays the characteristics defined for the ancillary pricing rule of a parent customer.

5. View the basic details of ancillary pricing rule in the **Main** zone.
6. View the ancillary charges in the **Ancillary Charges** zone.
7. View the characteristics of an ancillary pricing rule in the **Characteristics** zone.

Related Topics

For more information on...	See...
Customer 360° Information - Pricing tab	Customer 360° Information - Pricing Information on page 641
Parent Customer Pricing Rules zone	Parent Customer Pricing Rules on page 643
Pricing Rule screen	Pricing Rule (Used for Viewing) on page 689

Defining a Characteristic for an Ancillary Pricing Rule

Prerequisites

To define a characteristic for an ancillary pricing rule, you should have:

- Characteristic types defined in the application (where the characteristic entity is set to **Pricing Rule**).

Procedure

To define a characteristic for an ancillary pricing rule:

1. Ensure that the **Characteristics** section is expanded when you are defining or editing an ancillary pricing rule.

   The **Characteristics** section contains the following fields:

Column Name	Column Description	Mandatory (Yes or No)
Effective Date	Used to specify the date from when the characteristic is effective for the ancillary pricing rule.	Yes (Conditional) **Note:** This field is required when you are defining a characteristic for the ancillary pricing rule.
Characteristic Type	Used to indicate the characteristic type. **Note:** The list includes only those characteristic types where the characteristic entity is set to **Pricing Rule**.	Yes (Conditional) **Note:** This field is required when you are defining a characteristic for the ancillary pricing rule.
Characteristic Value	Used to specify the value for the characteristic type.	Yes (Conditional)

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Column Name	Column Description	Mandatory (Yes or No)
	Note: If you select a predefined characteristic type, the **Search** (🔍) icon appears corresponding to the **Characteristic Value** field. On clicking the **Search** icon, the **Predefined Characteristic Search** window appears. On specifying the value for a predefined characteristic type, the description of the characteristic value appears corresponding to the **Characteristic Value** field.	**Note:** This field is required when you are defining a characteristic for the ancillary pricing rule.

2. Enter the required details in the **Characteristics** section.
3. If you want to define more than one characteristic for the ancillary pricing rule, click the **Add** (+) icon and then repeat step 2.

> **Note:** However, if you want to remove a characteristic from the ancillary pricing rule, click the **Delete** (🗑) icon corresponding to the characteristic.

4. Click **Save**.
   The characteristics are defined for an ancillary pricing rule.

Related Topics

For more information on...	See...
How to define an ancillary pricing rule for a parent customer	Defining an Ancillary Pricing Rule for a Parent Customer on page 3197
How to edit an ancillary pricing rule for a parent customer	Editing an Ancillary Pricing Rule of a Parent Customer on page 3202
How to define an ancillary pricing rule for a bill group	Defining an Ancillary Pricing Rule for a Bill Group on page 3205
How to edit an ancillary pricing rule for a bill group	Editing an Ancillary Pricing Rule of a Bill Group on page 3210

Editing an Ancillary Pricing Rule of a Parent Customer

Prerequisites

To edit an ancillary pricing rule of a parent customer, you should have:

- Business Object **C1-PricingRuleAncillary** defined for ancillary pricing rule.

Procedure

To edit a ancillary pricing rule of a parent customer:

1. Search for a parent customer in the **Customer 360° View** screen.
2. In the **Search Results** section, click the **View** (🔗) icon corresponding to the parent customer *w*hose pricing details you want to view.
   The **Person** tab appears in the **Customer 360° Information** screen.
3. Click the **Pricing** tab.
   The **Pricing** screen appears.
4. In the **Parent Customer Pricing Rules** zone, click the **Edit** (✎) icon in the **Parent Customer Pricing Rules** zone, corresponding to the ancillary pricing rule whose details you want to edit.

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The **Ancillary Pricing Rule** screen appears. It contains the following sections:

- **Customer Information** - Displays the customer information.

Field Name	Field Description
Parent Customer Information	Displays the parent customer for whom the ancillary pricing rule is created.
Pricing Rule Type	Indicates the pricing rule type for whom the ancillary pricing rule is created.

- **Main** - Used to specify basic details about the ancillary pricing rule. In addition it allows you to define pricing for different types of ancillary charges. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Price Item	Displays the price item that is used to create ancillary pricing rule.	Not applicable
Pricing Start Date	Displays the date from when the ancillary pricing rule is effective.	Not applicable
Pricing End Date	Used to specify the date till when the ancillary pricing rule is effective.	Not applicable
Rate Option	Displays the rate option that you want to use while defining the price item.	Not applicable
Pass Through without Markup or Markdown	Indicates that markup or markdown should not be calculated for the ancillary charge. **Note:** This field is enabled when the **Rate Option** field is selected.	Yes (Conditional) **Note:** This field is required when you want to calculate the ancillary pricing without the pass through charge while defining the ancillary pricing rule.

The following fields appear when the **Pass Through without Markup or Markdown** option is not selected. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Billable Charge Line Type	Used to indicate the billable charge line type using which you want to create the ancillary pricing rule. **Note:** The Search (🔍) icon appears corresponding to this field. On clicking the **Search** icon, the **Billable Line Type Search** window appears. On specifying the billable charge line type, the description of the billable charge line type appears corresponding to the **Billable Charge Line Type** field.	Yes (Conditional) **Note:** This field is required while creating a pricing arrangement with or without rate based billable charge line type.
Billable	Used to indicate whether the ancillary charge is eligible for billing or not.	Yes (Conditional)

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Field Name	Field Description	Mandatory (Yes or No)
		Note: This field is required while creating a pricing arrangement with or without the **Rate Based** option.
Rate Based	Used to indicate whether the ancillary charge is calculated using a particular rate.	Yes (Conditional) **Note:** This field is required while creating a pricing arrangement with the **Rate Based** option.
Rate	Used to indicate the rate for calculating the ancillary charge. **Note:** This field is enabled when the **Rate Based** option is selected.	Yes (Conditional) **Note:** This field is required when **Rate Based** option is selected.
Pricing Strategy	Used to indicate the price calculation strategy which should be applied while defining the ancillary pricing rule. The valid values are: • Markup • Markdown • None	No
Markup or Markdown Type	Used to indicate the type of charge which should be applied while defining the ancillary pricing rule. The valid values are: • Flat Amount • Percentage **Note:** This field is enabled when the **Pricing Strategy** field is selected.	Yes (Conditional) **Note:** This field is required when the **Pricing Strategy** field is selected.
Amount / Percentage	Used to specify the actual proportion of the charge that should be applied while defining the ancillary pricing rule.	Yes (Conditional) **Note:** This field is required when the **Markup or Markdown Type** field is selected.

- **Characteristics** - Used to define the characteristics for the ancillary pricing rule.

5. Modify the details in the **Main** section.
6. Define, edit, or remove characteristics for an ancillary pricing rule, if required.
7. Click **Save**.
   The changes made to an ancillary pricing rule for a parent customer are saved.

Related Topics

For more information on...	See...
How to search for a parent customer	Searching for a Person on page 597

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For more information on...	See...
Parent Customer Pricing Rules zone	Parent Customer Pricing Rules on page 643
How to define the characteristics for an ancillary pricing rule	Defining a Characteristic for an Ancillary Pricing Rule on page 3201

Deleting an Ancillary Pricing Rule of a Parent Customer

Procedure

To delete an ancillary pricing rule of a parent customer:

1. Search for a parent customer in the **Customer 360° View** screen.
2. In the **Search Results** section, click the **View** (🔗) icon corresponding to the parent customer whose pricing details you want to view.
   The **Person** tab appears in the **Customer 360° Information** screen.
3. Click the **Pricing** tab.
   The **Pricing** screen appears.
4. In the **Parent Customer Pricing Rules** zone, click the **Delete** (🗑) icon in the **Delete** column corresponding to the ancillary pricing rule that you want to delete.
   A message appears confirming whether you want to delete the ancillary pricing rule of a parent customer.

> **Note:** You can delete an ancillary pricing rule when it is not yet used in the system.

5. Click **OK**.
   The ancillary pricing rule of a parent customer is deleted.

Related Topics

For more information on...	See...
How to search for a parent customer	Searching for a Person on page 597
Parent Customer Pricing Rules zone	Parent Customer Pricing Rules on page 643

Defining an Ancillary Pricing Rule for a Bill Group

Prerequisites

To define an ancillary pricing rule for a bill group, you should have:

- Pricing rule type where the category is set to **Ancillary**.
- Price items associated with the ancillary pricing rule type.
- Pricing arrangements defined in the ancillary pricing rule type.

Procedure

To define an ancillary pricing rule for a bill group:

1. Search for the Administrative Services Only (ASO) person, whose person type is set to **Bill Group**, in the **Customer 360° View** screen.
2. In the **Search Results** section, click the **View** (🔗) icon corresponding to the bill group whose pricing details you want to view.
   The **Person** tab appears in the **Customer 360° Information** screen.
3. Click the **Pricing** tab.
   The **Pricing** tab appears.

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4. Click the **Broadcast** (ᯤ) icon in the **Bill Group ASO Policy Information** zone, corresponding to the **Bill Group Information** column, whose bill group details you want to view.
   The **Bill Group ASO Policy Pricing Rules** zone appears.
5. Click the **Add** link in the upper-right corner of the **Bill Group ASO Policy Pricing Rules** zone.

   The **Pricing Rule** screen appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Person Name	Indicates the name of the parent customer.	Not applicable
Person Type	Indicates the type of the parent customer. **Note:** If you are defining the pricing rule type for the parent customer, then the person type will be **Parent Customer**.	Not applicable
Pricing Rule Type	Used to indicate the pricing rule type using which you want to create an ancillary pricing rule. **Note:** Select the **Ancillary Pricing Rule Type** option, as the pricing rule.	Yes **Note:** If the pricing rule type is not selected then the application displays an error message.
Pricing Group	Used to indicate the pricing group which is used while defining the pricing.	No
Policy Status	Used to indicate the policy status for the pricing rule. The valid values are: • In Force/Active • Post Runout • Runout **Note:** An ancillary pricing rule cannot be created for **Runout** or **Post Runout** policy status where the policy run out end date is missing.	Yes

6. Click **OK**.

   The **Ancillary Pricing Rule** screen appears. It contains the following sections:

   - **Customer Information** - Displays the information about the bill group. It contains the following fields:

Field Name	Field Description
Bill Group Information	Displays the bill group information.
Policy Start Date	Displays the date from when the policy is effective.
Policy End Date	Displays the date till when the policy is effective.
Policy Status	Indicates the policy status for the pricing rule.
Pricing Rule Type	Indicates the pricing rule type for whom the ancillary pricing rule is created.

   - **Main** - Used to specify basic details about the ancillary pricing rule. In addition it allows you to define pricing for different types of ancillary charges.

Field Name	Field Description	Mandatory (Yes or No)
Price Item	Used to indicate the price item that is used to create ancillary pricing rule.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
Pricing Start Date	Used to specify the date from when the ancillary pricing rule is effective.	Yes
Pricing End Date	Used to specify the date till when the ancillary pricing rule is effective.	No
Rate Option	Used to indicate the rate option that you want to use while defining the price item.	Yes
Pass Through without Markup or Markdown	Used when markup or markdown should not be calculated for the ancillary charge. **Note:** This field is enabled when the **Rate Option** field is selected.	Yes (Conditional) **Note:** This field is required when you want to calculate the ancillary pricing without the pass through charge while defining the ancillary pricing rule.

The following fields appear when the **Pass Through without Markup or Markdown** option is not selected. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Billable Charge Line Type	Used to indicate the billable charge line type using which you want to create the ancillary pricing rule. **Note:** The Search (🔍) icon appears corresponding to this field. On clicking the **Search** icon, the **Billable Line Type Search** window appears. On specifying the billable charge line type, the description of the billable charge line type appears corresponding to the **Billable Charge Line Type** field.	Yes (Conditional) **Note:** This field is required while creating a pricing arrangement with or without rate based billable charge line type.
Billable	Used to indicate whether the ancillary charge is eligible for billing or not.	Yes (Conditional) **Note:** This field is required while creating a pricing arrangement with or without the **Markup or Markdown Type** field and the **Rate Based** option.
Rate Based	Used to indicate whether the ancillary charge is calculated using a particular rate.	Yes (Conditional) **Note:** This field is required while creating a pricing arrangement with the **Rate Based** option.
Rate	Used to indicate the rate for calculating the ancillary charge.	Yes (Conditional)

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Field Name	Field Description	Mandatory (Yes or No)
	Note: This field is enabled when the **Rate Based** option is selected.	**Note:** This field is required when **Rate Based** option is selected.
Pricing Strategy	Used to indicate the price calculation strategy which should be applied while defining the ancillary pricing rule. The valid values are: • Markup • Markdown • None	No
Markup or Markdown Type	Used to indicate the type of charge which should be applied while defining the ancillary pricing rule. The valid values are: • Flat Amount • Percentage **Note:** This field is enabled when the **Pricing Strategy** field is selected.	Yes (Conditional) **Note:** This field is required when the **Pricing Strategy** field is selected.
Amount / Percentage	Used to specify the actual proportion of the charge that should be applied while defining the ancillary pricing rule.	Yes (Conditional) **Note:** This field is required when the **Markup or Markdown Type** field is selected.

- **Characteristics** - Used to define the characteristics for the ancillary pricing rule.

7. Enter the required details in the **Main** section.
8. Define the characteristics for an ancillary pricing rule, if required.
9. Click **Save**.

   The ancillary pricing rule for a bill group is defined.

Note: A price list and price assignment is created, the price list created is assigned to the ancillary pricing rule.

Related Topics

For more information on...	See...
Customer 360° Information - Pricing tab	Customer 360° Information - Pricing Information on page 641
Parent Customer Pricing Rules zone	Parent Customer Pricing Rules on page 643
How to define the characteristics for an ancillary pricing rule	Defining a Characteristic for an Ancillary Pricing Rule on page 3201

Viewing an Ancillary Pricing Rule of a Bill Group

Procedure

To view an ancillary pricing rule for a bill group:

1. Search for a bill group in the **Customer 360° View** screen.

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2. In the **Search Results** section, click the **View** (🔗) icon corresponding to the bill group whose pricing details you want to view.
   The **Person** tab appears in the **Customer 360° Information** screen.
3. Click the **Pricing** tab.
   The **Pricing** tab appears.
4. Click the **Broadcast** (📡) icon in the **Bill Group ASO Policy Information** zone, corresponding to the **Bill Group Information** column, whose bill group details you want to view.
   The **Bill Group ASO Policy Pricing Rules** zone appears.
5. In the **Bill Group ASO Policy Pricing Rules** zone, click the link in the **Pricing Rule Information** column corresponding to the ancillary pricing rule type whose specific ancillary pricing rule bill group you want to view.

   The **Pricing Rule** screen appears. It contains the following zone:

   - **Ancilary** - Displays the details of an ancillary pricing rule for a bill group. It contains the following sections:
     - **Main** - Displays the basic details of the ancillary pricing rule.
     - **Ancillary Charges** - Displays the details of the ancillary charges defined for an ancillary pricing rule of a bill group.
     - **Characteristics** - Displays the characteristics defined for an ancillary pricing rule.
6. View the basic details of an ancillary pricing rule in the **Main** section.
7. View the ancillary charges in the **Ancillary Charges** section.
8. View the characteristics of an ancillary pricing rule in the **Characteristics** section.

Related Topics

For more information on...	See...
Customer 360° Information - Pricing tab	Customer 360° Information - Pricing Information on page 641
Pricing Rule screen	Pricing Rule (Used for Viewing) on page 689

Defining a Characteristic for an Ancillary Pricing Rule

Prerequisites

To define a characteristic for an ancillary pricing rule, you should have:

- Characteristic types defined in the application (where the characteristic entity is set to **Pricing Rule**).

Procedure

To define a characteristic for an ancillary pricing rule:

1. Ensure that the **Characteristics** section is expanded when you are defining or editing an ancillary pricing rule.

   The **Characteristics** section contains the following fields:

Column Name	Column Description	Mandatory (Yes or No)
Effective Date	Used to specify the date from when the characteristic is effective for the ancillary pricing rule.	Yes (Conditional) **Note:** This field is required when you are defining a characteristic for the ancillary pricing rule.
Characteristic Type	Used to indicate the characteristic type.	Yes (Conditional)

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Column Name	Column Description	Mandatory (Yes or No)
	Note: The list includes only those characteristic types where the characteristic entity is set to **Pricing Rule**.	**Note:** This field is required when you are defining a characteristic for the ancillary pricing rule.
Characteristic Value	Used to specify the value for the characteristic type.	Yes (Conditional)
	Note: If you select a predefined characteristic type, the **Search** (🔍) icon appears corresponding to the **Characteristic Value** field. On clicking the **Search** icon, the **Predefined Characteristic Search** window appears. On specifying the value for a predefined characteristic type, the description of the characteristic value appears corresponding to the **Characteristic Value** field.	**Note:** This field is required when you are defining a characteristic for the ancillary pricing rule.

2. Enter the required details in the **Characteristics** section.
3. If you want to define more than one characteristic for the ancillary pricing rule, click the **Add** (+) icon and then repeat step 2.

> **Note:** However, if you want to remove a characteristic from the ancillary pricing rule, click the **Delete** (🗑) icon corresponding to the characteristic.

4. Click **Save**.
   The characteristics are defined for an ancillary pricing rule.

Related Topics

For more information on...	See...
How to define an ancillary pricing rule for a parent customer	Defining an Ancillary Pricing Rule for a Parent Customer on page 3197
How to edit an ancillary pricing rule for a parent customer	Editing an Ancillary Pricing Rule of a Parent Customer on page 3202
How to define an ancillary pricing rule for a bill group	Defining an Ancillary Pricing Rule for a Bill Group on page 3205
How to edit an ancillary pricing rule for a bill group	Editing an Ancillary Pricing Rule of a Bill Group on page 3210

Editing an Ancillary Pricing Rule of a Bill Group

Prerequisites

To edit an ancillary pricing rule of a bill group, you should have:

- Business Object **C1-PricingRuleAncillary** defined for ancillary pricing rule.

Procedure

To edit an ancillary pricing rule of a bill group:

1. Search for a bill group in the **Customer 360° View** screen.

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2. In the **Search Results** section, click the **View** (🔗) icon corresponding to the bill group *w*hose pricing details you want to view.
   The **Person** tab appears in the **Customer 360° Information** screen.
3. Click the **Pricing** tab.
   The **Pricing** tab appears.
4. Click the **Broadcast** (📡) icon in the **Bill Group ASO Policy Information** zone, corresponding to the **Bill Group Information** column, whose bill group details you want to view.
   The **Bill Group ASO Policy Pricing Rules** zone appears.
5. Click the **Edit** (✎) icon in the **Bill Group ASO Policy Pricing Rules** zone, corresponding to the **Pricing Group Information** column, whose pricing details you want to edit.

   The **Ancillary Pricing Rule** screen appears. It contains the following sections:

   - **Customer Information** - Displays the customer information for bill group.

Field Name	Field Description
Bill Group Information	Displays the bill group for whom the ancillary pricing rule is define.
Policy Start Date	Displays the date from when the policy is effective.
Policy End Date	Displays the date till when the policy is effective.
Policy Status	Indicates the policy status for the pricing rule.
Pricing Rule Type	Indicates the pricing rule type using which you want to define an ancillary pricing rule.
Status	Indicates the status of the bill group.

   - **Main** - Used to specify basic details about the ancillary pricing rule. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Price Item	Indicates the price item that is used to create ancillary pricing rule.	Yes
Pricing Start Date	Displays the date from when the ancillary pricing rule is effective.	Yes
Pricing End Date	Used to specify the date till when the ancillary pricing rule is effective. **Note:** This field by default displays the **Policy End Date**.	No
Rate Option	Indicates the rate option that you want to use while defining the price item.	Yes
Pass Through without Markup or Markdown	Used to indicate that markup and markdown prices must not be considered when the ancillary transaction is processed. **Note:** This field is enabled when the **Rate Option** field is selected.	Yes (Conditional) **Note:** This field is required when you want to calculate the ancillary pricing without the pass through charge while defining the ancillary pricing rule.

     The following fields appear when the **Pass Through without Markup or Markdown** option is not selected. It contains the following fields:

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Field Name	Field Description	Mandatory (Yes or No)
Billable Charge Line Type	Used to indicate the billable charge line type using which you want to create the ancillary pricing rule. **Note:** The Search (🔍) icon appears corresponding to this field. On clicking the **Search** icon, the **Billable Line Type Search** window appears. On specifying the billable charge line type, the description of the billable charge line type appears corresponding to the **Billable Charge Line Type** field.	Yes (Conditional) **Note:** This field is required while creating a pricing arrangement with or without rate based billable charge line type.
Billable	Used to indicate whether the ancillary charge is eligible for billing or not.	Yes (Conditional) **Note:** This field is required while creating a pricing arrangement with or without the **Markup or Markdown Type** field and the **Rate Based** option.
Rate Based	Used to indicate whether the ancillary charge is calculated using a particular rate.	Yes (Conditional) **Note:** This field is required while creating a pricing arrangement with the **Rate Based** option.
Rate	Used to indicate the rate for calculating the ancillary charge. **Note:** This field is enabled when the **Rate Based** option is selected.	Yes (Conditional) **Note:** This field is required when **Rate Based** option is selected.
Pricing Strategy	Used to indicate the price calculation strategy which should be applied while defining the ancillary pricing rule. The valid values are: • Markup • Markdown • None	No
Markup or Markdown Type	Used to indicate the type of charge which should be applied while defining the ancillary pricing rule. The valid values are: • Flat Amount • Percentage **Note:** This field is enabled when the **Pricing Strategy** field is selected.	Yes (Conditional) **Note:** This field is required when the **Pricing Strategy** field is selected.

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Field Name	Field Description	Mandatory (Yes or No)
Amount/Percentage	Used to specify the actual proportion of the charge that should be applied while defining the ancillary pricing rule.	Yes (Conditional) **Note:** This field is required when the **Markup or Markdown Type** field is selected.

- **Characteristics** - Used to define the characteristics for the ancillary pricing rule.

6. Modify the details in the **Main** section.
7. Define, edit, or remove characteristics for an ancillary pricing rule, if required.
8. Click **Save**.
   The changes made to an ancillary pricing rule for a bill group are saved.

Related Topics

For more information on...	See...
How to search for a parent customer	Searching for a Person on page 597
Parent Customer Pricing Rules zone	Parent Customer Pricing Rules on page 643
How to define a characteristic for an ancillary pricing rule	Defining a Characteristic for an Ancillary Pricing Rule on page 3201

Deleting an Ancillary Pricing Rule of a Bill Group

Procedure

To delete an ancillary pricing rule of a bill group:

1. Search for a bill group in the **Customer 360° View** screen.
2. In the **Search Results** section, click the **View** (🔗) icon corresponding to the bill group whose pricing details you want to view.
   The **Person** tab appears in the **Customer 360° Information** screen.
3. Click the **Pricing** tab.
   The **Pricing** tab appears.
4. Click the **Broadcast** (📡) icon in the **Bill Group ASO Policy Information** zone, corresponding to the **Bill Group Information** column, whose bill group details you want to delete.
   The **Bill Group ASO Policy Pricing Rules** zone appears.
5. Click the **Delete** (🗑) icon in the **Delete** column corresponding to the **Pricing Group Information** column, whose bill group information you want to delete.
   A message appears confirming whether you want to delete the ancillary pricing rule of a bill group.

> **Note:** You can delete an ancillary pricing rule when it is not yet used in the system.

6. Click **OK**.
   The ancillary pricing rule of a bill group is deleted.

Related Topics

For more information on...	See...
How to search for a parent customer	Searching for a Person on page 597
Parent Customer Pricing Rules zone	Parent Customer Pricing Rules on page 643

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Discount Pricing

The Administrative Services Only (ASO) provider may offer some discounts to its network hospitals and providers. A portion of these discounts is then charged to the self-funded employer. Oracle Revenue Management and Billing enables you to calculate and bill the discount share or discount guarantee amount to the self-funded employer. The system enables you to calculate the discount using the following methods:

- Discount Share on page 3214
- Discount Guarantee on page 3214

The pricing for the share or guarantee discount can be defined using the respective discount pricing rules. You can define a share or guarantee discount pricing rule only at the parent customer level. You can define the share or guarantee discount pricing rules for parent customers from the **Customer 360° Information** screen. You can define a share or guarantee discount pricing rule using a discount arrangement pricing rule type.

Once a discount arrangement pricing rule type is defined, you can create discount pricing rules using the discount arrangement pricing rule type. Once a discount pricing rule is created, the system creates multiple price assignments in a price list and assigns the price list to the parent customer.

The following new batches are introduced in this release:

- **C1-ACDA** - Once the transaction legs and calculation lines are created for discount, this batch is used to accumulate the discount. It also calculates the required minimum or maximum limit on the contract. For more information about the batch refer to *Oracle Revenue Management and Billing Batch Guide*.
- **C1-BCDA** - Once the discount is accumulated, this batch is used to create the credit (if any) and discount billable charges. It is also used to calculate the bill after date. For more information about the batch refer to *Oracle Revenue Management and Billing Batch Guide*.

Types of Discount Arrangement

The Oracle Revenue Management and Billing enables you to calculate the discount using the following methods:

- Discount Share on page 3214
- Discount Guarantee on page 3214

Discount Share

In the discount share method, the discount is calculated while processing the claim transaction. It is calculated as follows:

Billable Discount Amount = Discount Savings Amount * Discount Percentage

Note that the discount share percentage varies depending on various parameters (such as health coverage class, In or Out Network, etc). Therefore, the system enables you to define different discount percentage for the claim transactions which are received from employees with different set of attributes. The system allows you to define maximum discount amount that can be charged per claim transaction. You can optionally configure the minimum and maximum discount limit on the contract. Note that the minimum limit is applicable during the settlement and maximum limit is applicable when you execute the **C1-ACDA** batch. The minimum and maximum limit can be a flat limit or enrollment based limit. Once the discount is accumulated, you can charge the customer at the pre-defined frequency. If the discount amount exceeds the maximum discount limit per claim or if the discount amount exceeds maximum discount limit defined on the contract, a credit billable charge is created for the customer.

Discount Guarantee

In the discount guarantee method, the discount is calculated while processing the claim transaction. It is calculated as follows:

Targeted Guaranteed Amount = Covered Charge Amount * Discount Guarantee Percentage

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Billable Discount Amount = Discount Savings Amount - Targeted Guaranteed Amount

Note that the discount guarantee percentage varies depending on various parameters (such as health coverage class, In or Out Network, etc). Therefore, the system enables you to define different discount percentage for the claim transactions which are received from employees with different set of attributes. The system allows you to define maximum discount amount that can be charged per claim transaction. You can optionally configure the minimum and maximum discount limit on the contract. Note that the minimum limit is applicable during the settlement and maximum limit is applicable when you execute the **C1-ACDA** batch. The minimum and maximum limit can be a flat limit or enrollment based limit. Once the discount is accumulated, you can charge the customer at the pre-defined frequency. If the discount amount exceeds the maximum discount limit per claim or if the discount amount exceeds maximum discount limit defined on the contract, a credit billable charge is created for the customer.

Defining a Discount Arrangement Pricing Rule Type

Prerequisites

To define a discount arrangement pricing rule type, you should have:

- Discount Arrangement pricing rule type business object defined in the application
- Discount Arrangement pricing rule business object defined in the application

Procedure

To define a discount arrangement pricing rule type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **P** and then click **Pricing Rule Type**.
   A sub-menu appears.
3. Click the **Add** option from the **Pricing Rule Type** sub-menu.

   The **Select Business Object** screen appears. It contains the following field:

Field Name	Field Description	Mandatory (Yes or No)
Pricing Rule Type Business Object	Used to indicate the business object using which you want to create a discount arrangement pricing rule type. The valid values are: • Aggregate Stop-Loss (ASL) Pricing Rule Type • Ancillary Pricing Rule Type • Claim Pricing Rule Type • Discount Arrangement Pricing Rule Type • Flat Fee Pricing Rule Type • Level Funded (LF) Pricing Rule Type • Retention Type Claim Based Pricing Rule Type • Retention Type Enrollment Based Pricing Rule Type • Specific Stop-Loss (SSL) Pricing Rule Type **Note:** You must select the **Discount Arrangement Pricing Rule Type** option from the **Pricing Rule Type Business Object** list while defining a discount arrangement pricing rule type.	Yes

Tip: Alternatively, you can access this screen by clicking the **Add** button in the **Page Title** area of the **Pricing Rule Type** screen.

4. Select the **Discount Arrangement Pricing Rule Type** option from the **Pricing Rule Type Business Object** list.

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5. Click **OK**.

The **Discount Arrangement Pricing Rule Type** screen appears. It contains the following sections:

- **Main** - Used to specify basic details about the discount arrangement pricing rule type.
- **Algorithms** - Used to associate the algorithms with the discount arrangement pricing rule type.
- **Additional Data** - Used to specify additional information in the discount arrangement pricing rule type.
- **Price Items** - Used to add the price items for which you can define the discount arrangement pricing rules using the discount arrangement pricing rule type.
- **Price Item Parameters** - Used to add the price item parameters based on which you want to define the price item pricing.
- **Characteristics** - Used to define the characteristics for the discount arrangement pricing rule type.
- **DA - Specific Additional Data** - Used to specify discount arrangement-specific additional data in the discount arrangement pricing rule type.

The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Pricing Rule Type	Used to specify the discount arrangement pricing rule type.	Yes
Description	Used to specify the description for the discount arrangement pricing rule type.	Yes
Detailed Description	Used to specify additional information about the discount arrangement pricing rule type.	No
Pricing Rule Business Object	Used to indicate the business object using which you want to create the discount arrangement pricing rule. The valid value are: • **Aggregate Stop-Loss (ASL) Pricing Rule** • **Ancillary Pricing Rule** • **Claim Pricing Rule** • **Discount Arrangement Pricing Rule** • **Flat Fee Pricing Rule** • **Level Funded (LF) Pricing Rule** • **Retention Type Claim Based Pricing Rule** • **Retention Type Enrollment Based Pricing Rule** • **Specific Stop-Loss (SSL) Pricing Rule** **Note:** You must select the **Discount Arrangement Pricing Rule** option from the **Pricing Rule Business Object** list while defining a discount arrangement pricing rule type.	Yes
Business Object	Indicates the business object using which you are defining the discount arrangement pricing rule type.	Not applicable
Status	Used to indicate the status of the discount arrangement pricing rule type. The valid values are: • Active • Inactive	Yes
Primary	Used to indicate whether the discount arrangement pricing rule type is a primary pricing rule type.	Not applicable

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Field Name	Field Description	Mandatory (Yes or No)
	Note: You must not select the **Primary** option while defining a discount arrangement pricing rule type.	
Pricing Rule Type Category	Used to indicate the category to which the discount arrangement pricing rule type belongs. The valid value is: • **Aggregate Stop-Loss** • **Ancillary** • **Claim** • **Discount Arrangement** • **Flat Fees** • **Level Funded** • **Retention Type Claim Based** • **Retention Type Enrollment Based** • **Specific Stop-Loss**	Yes
	Note: You must select the **Discount Arrangement** option from the **Pricing Rule Type Category** list while defining a discount arrangement pricing rule type.	

6. Enter the required details in the **Main** section.
7. Select the **Discount Arrangement Pricing Rule** option from the **Pricing Rule Business Object** list.
8. Ensure that **Primary** option is not selected when you are defining a discount arrangement pricing rule type.
9. Select the **Discount Arrangement** option from the **Pricing Rule Type Category** list.
10. Associate the following algorithms with the discount arrangement pricing rule type:

System Event	Algorithm	Algorithm Type	Description
Account and Price Item Derivation	C1_ACCPRIDIS	C1_ACCPRIDIS	Account and Priceitem Derivation For Discount Arrangement

11. Define additional data for a discount arrangement pricing rule type, if required.
12. Add the required price items in the discount arrangement pricing rule type.
13. Add the price item parameters in the discount arrangement pricing rule type, if required.
14. Define characteristics for a discount arrangement pricing rule type, if required.
15. Add discount arrangement-specific additional data in the discount arrangement pricing rule type.
16. Click **Save**.
    The discount arrangement pricing rule type is defined.

Related Topics

For more information on...	See...
Pricing Rule Type screen	Pricing Rule Type on page 2942
How to associate algorithms with the discount arrangement pricing rule type	Associating Algorithms with a Discount Arrangement Pricing Rule Type on page 3218
How to define additional data for a discount arrangement pricing rule type	Defining Additional Data in a Discount Arrangement Pricing Rule Type on page 3220

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For more information on...	See...
How to add price items in the discount arrangement pricing rule type	Adding a Price Item in a Discount Arrangement Pricing Rule Type on page 3222
How to add price item parameters in the discount arrangement pricing rule type	Adding a Price Item Parameter in a Discount Arrangement Pricing Rule Type on page 3224
How to define a characteristic for a discount arrangement pricing rule type	Defining a Characteristic for a Discount Arrangement Pricing Rule Type on page 3226
How to add discount arrangement-specific data in the discount arrangement pricing rule type	Defining the Discount Specific Data in a Discount Arrangement Pricing Rule Type on page 3227

Associating Algorithms with a Discount Arrangement Pricing Rule Type

Prerequisites

To associate algorithms with a discount arrangement pricing rule type, you should have:

- An algorithm defined using the **C1_ACCPRIDIS** algorithm type.

Procedure

To associate algorithms with a discount arrangement pricing rule type:

1. Ensure that the **Algorithms** section is expanded when you are defining or editing a *d*iscount arrangement pricing rule type.

   The **Algorithms** section contains the following fields in a grid:

Field Name	Field Description	Mandatory (Yes or No)
System Event	Used to indicate the system event when you want to execute the algorithm. The valid values are: • **Account and Price Item Derivation** - Used to derive the account and price item for the discount arrangement transaction. • **Accumulation Billable Charge Post Proc** - Used to introduce a custom logic after creating discount share or discount guarantee billable charges. This algorithm is invoked in the **C1-BCDA (Create Billable Charge for Discount)** batch. • **Accumulation Billable Charge Pre Proc** - Used to introduce a custom logic before creating discount share or discount guarantee billable charges. This algorithm is invoked in the **C1-BCDA (Create Billable Charge for Discount)** batch. • **Accumulation Post Processing** - Used to introduce a custom logic after accumulating the discount share or discount guarantee amount. This algorithm is invoked in the **C1-ACDA (Accumulate Discount Arrangement)** batch. • **Accumulation Pre Processing** - Used to introduce a custom logic before accumulating the discount share or discount guarantee amount. This algorithm is invoked in the **C1-ACDA (Accumulate Discount Arrangement)** batch.	Yes (Conditional) **Note:** This field is required when you are associating an algorithm with the discount arrangement pricing rule type.

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Field Name	Field Description	Mandatory (Yes or No)
	• **Pricing Rule Post Processing** - Used to introduce a custom logic once the effective discount arrangement pricing rule is derived for the discount arrangement transaction. • **Transaction Validation** - Used to introduce a custom validation for the discount arrangement transaction.	
Sequence	Used to specify the order in which the algorithms with the same system event must be executed.	Yes (Conditional) **Note:** This field is required when you are associating an algorithm with the discount arrangement pricing rule type.
Algorithm	Used to specify the algorithm that you want to execute on the system event. **Note:** Once you select the system event, the **Search** (🔍) icon appears corresponding to the **Algorithm** field. On clicking the **Search** (🔍) icon, the **Algorithm Search** window appears. On specifying the algorithm, the description of the algorithm appears corresponding to the **Algorithm** field.	Yes (Conditional) **Note:** This field is required when you are associating an algorithm with the discount arrangement pricing rule type.

2. Enter the following details in the **Algorithms** section:

System Event	Algorithm	Mandatory (Yes or No)	For more information, see...
Account and Price Item Derivation	C1_ACCPRIDIS	Yes	Information will be available soon...
Accumulation Billable Charge Post Proc	- **Note:** An accumulation billable charge post processing algorithm type is not shipped with the product. You can create a custom algorithm type, if required.	No	-
Accumulation Billable Charge Pre Proc	- **Note:** An accumulation billable charge pre processing algorithm type is not shipped with the product. You can create a custom algorithm type, if required.	No	-
Accumulation Post Processing	-	No	-

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System Event	Algorithm	Mandatory (Yes or No)	For more information, see...
	Note: An accumulation post processing algorithm type is not shipped with the product. You can create a custom algorithm type, if required.		
Accumulation Pre Processing	-	No	-
	Note: A accumulation pre processing algorithm type is not shipped with the product. You can create a custom algorithm type, if required.		
Pricing Rule Post Processing	-	No	-
	Note: A pricing rule post processing algorithm type is not shipped with the product. You can create a custom algorithm type, if required.		
Transaction Validation	-	No	-
	Note: An algorithm type for validating a discount arrangement transaction is not shipped with the product. You can create a custom algorithm type, if required.		

3. If you want to associate more than one algorithm with the discount arrangement pricing rule type, click the **Add** (+) icon and then specify the details. However, if you want to remove an algorithm from the discount arrangement pricing rule type, click the **Delete** (🗑) icon corresponding to the algorithm.
4. Click **Save**.
   The algorithms are associated with the discount arrangement pricing rule type.

Related Topics

For more information on...	See...
How to define the discount arrangement pricing rule type	Defining a Discount Arrangement Pricing Rule Type on page 3215
How to edit the discount arrangement pricing rule type	Editing a Discount Arrangement Pricing Rule Type on page 3229

Defining Additional Data in a Discount Arrangement Pricing Rule Type

Procedure

To define additional data in a discount arrangement pricing rule type:

1. Ensure that the **Additional Data** section is expanded when you are defining or *e*diting a discount arrangement pricing rule type.

   The **Additional Data** section contains the following fields:

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Field Name	Field Description	Mandatory (Yes or No)
Eligible for Specific Stop-Loss	Used to indicate whether price items included in the discount arrangement pricing rule type are eligible for specific stop-loss. The valid values are: • Yes • No	No
Eligible for Level Funding	Used to indicate whether price items included in the discount arrangement pricing rule type are eligible for level funding. The valid values are: • Yes • No **Note:** If you do not specify the value for this field, by default, it is set to **No**.	No
Run-in Identifier Value	Used to specify the identifier value to determine whether the discount arrangement transaction is received during the run-in period of the policy.	No
Third Party Identifier Value	Used to specify the identifier value to determine whether the discount arrangement transaction is received from an external source system. **Note:** At present, this field is not used in the system.	Not applicable
Accumulation Only Identifier Value	Used to specify the identifier value to determine whether the discount arrangement transaction contains the accumulated information of ASL, SSL, and Level Funding pricing types.	No
Eligible for Write-Off in Post Runout	Used to indicate whether the discount charges should be written off when the bill is generated in the post runout period of the policy. The valid values are: • Yes • No For more information, refer to the Write-Off Charges during Post Runout section. **Note:** By default, the value is set to **No**.	No
Post Runout Write-Off Adjustment Type	Used to specify the adjustment type using which you want to create post runout write-off adjustment.	Yes (Conditional)

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Field Name	Field Description	Mandatory (Yes or No)
	Note: This field appears when the **Eligible for Write-Off in Post Runout** field is set to **Yes**. The **Search** (🔍) icon appears corresponding to the **Post Runout Write-Off Adjustment Type** field. On clicking the **Search** icon, the **Adjustment Type Search** window appears. On specifying the adjustment type, the description of the adjustment type appears corresponding to the **Post Runout Write-Off Adjustment Type** field.	**Note:** This field is required when the **Eligible for Write-Off in Post Runout** field is set to **Yes**.
Rule Based Price Item Eligibility Field	Used to indicate the transaction field which you want to use in the rules as the output parameter to determine whether the price item should be considered for billing. **Note:** For more information, refer to the Price Item Eligibility on page 3315 section. The **Search** (🔍) icon appears corresponding to the **Rule Based Price Item Eligibility Field** field. On clicking the **Search** icon, the **Field Search** window appears. On specifying the field name, the description of the field name appears corresponding to the **Rule Based Price Item Eligibility Field**.	No
Rule Based Eligibility Value	Used to specify the value which the output parameter in the rule should return when the price item in the discount arrangement pricing rule type should be considered for processing.	Yes (Conditional) **Note:** This field is required when a value is specified in the **Rule Based Price Item Eligibility Field** field.

2. Enter the required details in the **Additional Data** section.
3. Click **Save**.
   The additional data is defined in the discount arrangement pricing rule type.

Related Topics

For more information on...	See...
How to define a discount arrangement pricing rule type	Defining a Discount Arrangement Pricing Rule Type on page 3215
How to edit a discount arrangement pricing rule type	Editing a Discount Arrangement Pricing Rule Type on page 3229

Adding a Price Item in a Discount Arrangement Pricing Rule Type

Prerequisites

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To add a price item in a discount arrangement pricing rule type, you should have:

- Price item defined in the application
- Rate options defined in the **Rate Option (C1-ExtLookRetTypeRateOpt)** extendable lookup
- Values defined for the **Invoice Type (C1INVTYP)** characteristic type
- The **C1INVTYP** characteristic type set in the **Invoice Type Characteristic Type** option type of the **C1-ASOBLLNG** feature configuration
- Rule types defined in the application (where the rule type usage is set to **Price Item Eligibility**)

Procedure

To add a price item in a pricing rule type:

1. Ensure that the **Price Items** section is expanded when you are defining or *e*diting a discount arrangement pricing rule type.

   The **Price Items** section contains the following fields in a grid:

<table>
<tr><th>Field Name</th><th>Field Description</th><th>Mandatory (Yes or No)</th></tr>
<tr><td>Price Item</td><td>Used to indicate the price item that you want to include in the discount arrangement pricing rule type.

Note:
The Search (🔍) icon appears corresponding to the Price Item field. On clicking the Search icon, the Price Item Search window appears.
On specifying the price item, the description of the price item appears corresponding to the Price Item field.</td><td>Yes (Conditional)

Note: This field is required when you are adding a rate option and bill to account in the discount arrangement pricing rule type.</td></tr>
<tr><td>Rate Option</td><td>Used to indicate one or more rate options which are valid for a price item.
On clicking the Add (+) icon, the following field appears in a grid:
<table><tr><th>Field Name</th><th>Field Description</th><th>Mandatory (Yes or No)</th></tr><tr><td>Rate Option</td><td>Used to indicate the rate option that you want to use while defining pricing for the price item.</td><td>Yes</td></tr></table>Note:
If you want to define more than one rate option to the price item in the discount arrangement pricing rule type, click the Add (+) icon.
However, if you want to remove a price item from a discount arrangement pricing rule type, click the Delete (🗑) icon corresponding to the Rate Option field.</td><td>Not applicable</td></tr>
<tr><td>Bill To Account</td><td>Used to indicate a order in which the account should be considered while deriving a transaction leg.
On clicking the Add (+) icon, the following fields appear in a grid:</td><td>Not applicable</td></tr>
</table>

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<table>
<tr><th>Field Name</th><th>Field Description</th><th>Mandatory (Yes or No)</th></tr>
<tr><td></td><td>
<table>
<tr><th>Field Name</th><th>Field Description</th><th>Mandatory (Yes or No)</th></tr>
<tr><td>Priority</td><td>Used to specify the order in which the invoice type is considered for a price item.</td><td>Yes</td></tr>
<tr><td>Invoice Type</td><td>Used to indicate the type which is considered for billing. For more information, refer to the Bill Group's Account on page 13 section.

Note: The Search (🔍) icon appears corresponding to the Invoice Type field. On clicking the Search icon, the Invoice Type Search window appears.</td><td>Yes</td></tr>
</table>
Note:
If you want to define more than one invoice type to the price item in a discount arrangement pricing rule type, click the Add (+) icon.
However, if you want to remove a invoice type from the price item in a discount arrangement pricing rule type, click the Delete (🗑) icon corresponding to the Priority field.
</td><td></td></tr>
<tr><td>Eligibility Rule Type</td><td>Used to indicate the rule type which indicates the rules that should be executed to determine whether the price item is eligible for billing.</td><td>No</td></tr>
</table>

2. Enter the required details in the **Price Items** section.
3. If you want to define more than one price item in a discount arrangement pricing rule type, click the **Add** (+) icon and then repeat step 2.

Note: However, if you want to remove a price item from a discount arrangement pricing rule type, click the **Delete** (🗑) icon corresponding to the **Price Item** field.

4. Click **Save**.
   The price items are added for a discount arrangement pricing rule type.

Related Topics

For more information on...	See...
How to define a discount arrangement pricing rule type	Defining a Discount Arrangement Pricing Rule Type on page 3215
How to edit a discount arrangement pricing rule type	Editing a Discount Arrangement Pricing Rule Type on page 3229

Adding a Price Item Parameter in a Discount Arrangement Pricing Rule Type

Prerequisites

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To add a price item parameter in a discount arrangement pricing rule type, you should have:

- Parameter defined in the application where parameter usage is set to **Price Item**.
- Parameter associated with the price item.
- Transaction fields defined in the application.

Procedure

To add a price item parameter in a discount arrangement pricing rule type:

1. Ensure that the **Price Item Parameters** section is expanded when you are defining or *e*diting a discount arrangement pricing rule type.

   The **Price Item Parameters** section contains the following fields in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Price Item Parameter	Used to specify the parameter which you can use while defining a discount arrangement pricing for the price item. **Note:** The **Search** (🔍) icon appears corresponding to the **Price Item Parameter** field. On clicking the **Search** (🔍) icon corresponding to the **Price Item Parameter** field, the **Parameter Search** window appears. On specifying the parameter, the description of the price item parameter appears corresponding to the **Price Item Parameter** field.	Yes (Conditional) **Note:** This field is required while adding a price item parameter in a discount arrangement pricing rule type.
Transaction Field	Used to map to a transaction field which contains the parameter value. **Note:** The **Search** (🔍) icon appears corresponding to the **Transaction Field** field. On clicking the **Search** (🔍) icon corresponding to the **Transaction Field** field, the **Transaction Field Search** window appears. On specifying the transaction field, the description of the transaction field appears corresponding to the **Transaction Field**.	Yes (Conditional) **Note:** This field is required while adding a price item parameter in a discount arrangement pricing rule type.
Eligible for Specific Stop-Loss	Used to indicate whether the price item parameter can be used while defining the accumulation criteria in the specific stop-loss or aggregate stop-loss pricing rules at the bill group level.	No
Eligible for Level Funding	Used to indicate whether the price item parameter can be used while defining the accumulation criteria in the level funding pricing rules at the bill group level.	No

2. Enter the required details in the **Price Item Parameters** section.
3. If you want to add more than one price item parameter in a discount arrangement pricing rule type, click the **Add** (+) icon and then repeat step 2.

Note: However, if you want to remove a price item parameter from a discount arrangement pricing rule type, click the **Delete** (🗑) icon corresponding to the price item parameter.

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4. Click **Save**.
   The price item parameter is added in the discount arrangement pricing rule type.

Related Topics

For more information on...	See...
How to define a discount arrangement pricing rule type	Defining a Discount Arrangement Pricing Rule Type on page 3215
How to edit a discount arrangement pricing rule type	Editing a Discount Arrangement Pricing Rule Type on page 3229

Defining a Characteristic for a Discount Arrangement Pricing Rule Type

Prerequisites

To define a characteristic for a discount arrangement pricing rule type, you should have:

- Characteristic types defined in the application (where the characteristic entity is set to **Pricing Rule Type**)

Procedure

To define a characteristic for a discount arrangement pricing rule type:

1. Ensure that the **Characteristics** section is expanded when you are defining or *e*diting a discount arrangement pricing rule type.

   The **Characteristics** section contains the following fields in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Characteristic Type	Used to indicate the characteristic type.	Yes (Conditional)
	Note: The list includes only those characteristic types where the characteristic entity is set to **Pricing Rule Type**.	**Note:** This field is required when you are defining a characteristic for a discount arrangement pricing rule type.
Characteristic Value	Used to specify the value for the characteristic type.	Yes (Conditional)
	Note: If you select a predefined characteristic type, the **Search** (🔍) icon appears corresponding to the **Characteristic Value** field. On clicking the **Search** icon, the **Predefined Characteristic Search** window appears. On specifying the value for a predefined characteristic type, the description of the characteristic value appears corresponding to the **Characteristic Value** field.	**Note:** This field is required when you are defining a characteristic for a discount arrangement pricing rule type.

2. Enter the required details in the **Characteristics** section.
3. If you want to define more than one characteristic for a discount arrangement pricing rule type, click the **Add** (+) icon and then repeat step 2.

   Note: However, if you want to remove a characteristic from a discount arrangement pricing rule type, click the **Delete** (🗑) icon corresponding to the characteristic.

4. Click **Save**.

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The characteristic is defined for a discount arrangement pricing rule type.

Related Topics

For more information on...	See...
How to define a discount arrangement pricing rule type	Defining a Discount Arrangement Pricing Rule Type on page 3215
How to edit a discount arrangement pricing rule type	Editing a Discount Arrangement Pricing Rule Type on page 3229

Defining the Discount Specific Data in a Discount Arrangement Pricing Rule Type

Procedure

To add the discount-specific data in a discount arrangement pricing rule type:

1. Ensure that the **DA - Specific Additional Data** section is expanded when you are defining or editing a discount arrangement pricing rule type.

   The **DA - Specific Additional Data** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Guaranteed Discount	Used to indicate whether the discount arrangement pricing rule type is defined for discount guarantee or discount share. The valid values are: • **Yes** - Used when you want to create a discount guarantee pricing rule type. • **No** - Used when you want to create a discount share pricing rule type.	Yes
Discount Billable Charge Line Type	Used to indicate a billable charge line type using which you want to create the charge line for discount. **Note:** The **Search** (🔍) icon appears corresponding to the **Discount Billable Charge Line Type** field. On clicking the **Search** icon, the **Billable Charge Line Type Search** window appears. On specifying the billable charge line type, the description of the billable charge line type appears corresponding to the **Discount Billable Charge Line Type** field.	Yes
Credit Billable Charge Line Type	Used to indicate a billable charge line type using which you want to create the charge line for any credit to the customer.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The **Search** (🔍) icon appears corresponding to the **Credit Billable Charge Line Type** field. On clicking the **Search** icon, the **Billable Charge Line Type Search** window appears. On specifying the billable charge line type, the description of the billable charge line type appears corresponding to the **Credit Billable Charge Line Type** field.	
Minimum Limit Pricing Rule Type	Used to indicate the retention type enrollment based pricing rule type which you want to use while calculating the minimum limit for the discount. **Note:** The **Search** (🔍) icon appears corresponding to the **Minimum Limit Pricing Rule Type** field. On clicking the **Search** icon, the **Pricing Rule Type Search** window appears. On specifying the pricing rule type, the description of the pricing rule type appears corresponding to the **Minimum Limit Pricing Rule Type** field.	Yes (Conditional) **Note:** This field is required when you are defining enrollment based minimum discount limit on the contract in a discount share pricing rule.
Minimum Limit Price Item	Used to indicate the price item whose pricing you want to use while calculating the minimum limit for the discount. **Note:** The **Search** (🔍) icon appears corresponding to the **Minimum Limit Price Item** field. On clicking the **Search** icon, the **Price Item Details** window appears. On specifying the price item, the description of the price item appears corresponding to the **Minimum Limit Price Item** field.	Yes (Conditional) **Note:** This field is required when you are defining enrollment based minimum discount limit on the contract in a discount share pricing rule.
Maximum Limit Pricing Rule Type	Used to indicate the retention type enrollment based pricing rule type which you want to use while calculating the maximum limit for the discount. **Note:** The **Search** (🔍) icon appears corresponding to the **Maximum Limit Pricing Rule Type** field. On clicking the **Search** icon, the **Pricing Rule Type Search** window appears. On specifying the pricing rule type, the description of the pricing rule type appears corresponding to the **Maximum Limit Pricing Rule Type** field.	Yes (Conditional) **Note:** This field is required when you are defining enrollment based maximum discount limit on the contract in a discount share or discount guarantee pricing rule.
Maximum Limit Price Item	Used to indicate the price item whose pricing you want to use while calculating the maximum limit for the discount. Used	Yes (Conditional)

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Field Name	Field Description	Mandatory (Yes or No)
	to indicate the price item whose pricing you want to use while calculating the minimum limit for the discount. **Note:** The **Search** (🔍) icon appears corresponding to the **Maximum Limit Price Item** field. On clicking the **Search** icon, the **Price Item Details** window appears. On specifying the price item, the description of the price item appears corresponding to the **Maximum Limit Price Item** field.	**Note:** This field is required when you are defining enrollment based maximum discount limit on the contract in a discount share or discount guarantee pricing rule.

2. Enter the required details in the **DA - Specific Additional Data** section.
3. Click **Save**.
   The discount-specific data is added in the discount arrangement pricing rule type.

Related Topics

For more information on...	See...
How to define a discount arrangement pricing rule type	Defining a Discount Arrangement Pricing Rule Type on page 3215
How to edit a discount arrangement pricing rule type	Editing a Discount Arrangement Pricing Rule Type on page 3229

Editing a Discount Arrangement Pricing Rule Type

Prerequisites

To edit a discount arrangement pricing rule type, you should have:

- Discount arrangement pricing rule type business object defined in the application.
- Discount arrangement pricing rule business object defined in the application.

Procedure

To edit a discount arrangement pricing rule type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **P** and then click **Pricing Rule Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Pricing Rule Type** sub-menu.
   The **Pricing Rule Type** screen appears.
4. In the **Pricing Rule Type List** zone, click the **Edit** (✎) icon in the **Edit** column corresponding to the pricing rule type whose details you want to edit.

   The **Discount Arrangement Pricing Rule Type** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details about the discount arrangement pricing rule type.
   - **Algorithms** - Used to associate the algorithms with the discount arrangement pricing rule type.
   - **Additional Data** - Used to specify additional information in the discount arrangement pricing rule type.
   - **Price Items** - Used to add the price items for which you can define the discount arrangement pricing rules using the discount arrangement pricing rule type.

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- **Price Item Parameters** - Used to add the price item parameters based on which you want to define the price item pricing.
- **Characteristics** - Used to define the characteristics for the discount arrangement pricing rule type.
- **DA-Specific Additional Data** - Used to specify discount arrangement-specific additional data in a discount arrangement pricing rule type.

The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Pricing Rule Type	Displays the discount arrangement pricing rule type.	Not applicable
Description	Used to specify the description for the discount arrangement pricing rule type.	Yes
Detailed Description	Used to specify additional information about the discount arrangement pricing rule type.	No
Pricing Rule Business Object	Used to indicate the business object using which you want to create the discount arrangement pricing rule. The valid value is: • Aggregate Stop-Loss (ASL) Pricing Rule • Ancillary Pricing Rule • Claim Pricing Rule • Discount Arrangement Pricing Rule • Flat Fee Pricing Rule • Level Funded (LF) Pricing Rule • Retention Type Claim Based Pricing Rule • Retention Type Enrollment Based Pricing Rule • Specific Stop-Loss (SSL) Pricing Rule **Note:** You must select the **Discount Arrangement Pricing Rule** option from the **Pricing Rule Business Object** list while defining a discount arrangement pricing rule type.	Yes
Business Object	Indicates the business object used while defining the discount arrangement pricing rule type.	Not applicable
Status	Used to indicate the status of the discount arrangement pricing rule type. The valid values are: • Active • Inactive	Yes
Primary	Used to indicate whether the discount arrangement pricing rule type is a primary pricing rule type. **Note:** You must not select the **Primary** option while defining the discount arrangement pricing rule type.	Not applicable
Pricing Rule Type Category	Indicates the category to which the discount arrangement pricing rule type belongs. The valid values are: • Aggregate Stop-Loss • Ancillary • Claim • Discount Arrangement	No

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Field Name	Field Description	Mandatory (Yes or No)
	• Flat Fees • Level Funded • Retention Type Claim Based • Retention Type Enrollment Based • Specific Stop-Loss	
	Note: You must select the **Discount Arrangement** option from the **Pricing Rule Type Category** list while defining a discount arrangement pricing rule type.	

Tip: Alternatively, you can edit the details of a discount arrangement pricing rule type by clicking the **Edit** button in the **Pricing Rule Type** zone.

5. Modify the required details in the **Main** section.
6. Ensure that the **Discount Arrangement Pricing Rule** option is selected from the **Pricing Rule Business Object** list.
7. Ensure that **Primary** option is not selected when you are editing a discount arrangement pricing rule type.
8. Associate the following algorithms with the discount arrangement pricing rule type:

System Event	Algorithm	Algorithm Type	Description
Account and Price Item Derivation	C1_ACCPRIDIS	C1_ACCPRIDIS	Account and Priceitem Derivation For Discount Arrangement

9. Modify the additional data for a discount arrangement pricing rule type, if required.
10. Add, edit, or remove price items in the discount arrangement pricing rule type, if required.
11. Add, edit, or remove price item parameters in the discount arrangement pricing rule type, if required.
12. Add, edit, or remove characteristics in the discount arrangement pricing rule type, if required.
13. Modify the discount arrangement-specific data in the discount arrangement pricing rule type, if required.
14. Click **Save**.
    The changes made to the discount arrangement pricing rule type are saved.

Related Topics

For more information on...	See...
How to associate a algorithm with the discount arrangement pricing rule type	Associating Algorithms with a Discount Arrangement Pricing Rule Type on page 3218
How to define additional data for discount arrangement pricing rule type	Defining Additional Data in a Discount Arrangement Pricing Rule Type on page 3220
How to add pricing items in the discount arrangement pricing rule type	Adding a Price Item in a Discount Arrangement Pricing Rule Type on page 3222
How to add price item parameters in the discount arrangement pricing rule type	Adding a Price Item Parameter in a Discount Arrangement Pricing Rule Type on page 3224
How to define a characteristic for the discount arrangement pricing rule type	Defining a Characteristic for a Discount Arrangement Pricing Rule Type on page 3226

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For more information on...	See...
How to define discount arrangement-specific data in the pricing rule type	Defining the Discount Specific Data in a Discount Arrangement Pricing Rule Type on page 3227

Deleting a Discount Arrangement Pricing Rule Type

Procedure

To delete a discount arrangement pricing rule type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **P** and then click **Pricing Rule Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Pricing Rule Type** sub-menu.
   The **Pricing Rule Type** screen appears.
4. In the **Pricing Rule Type List** zone, click the **Delete** () icon in the **Delete** column corresponding to the discount arrangement pricing rule type that you want to delete.
   A message appears confirming whether you want to delete the discount arrangement pricing rule type.

   Note: You can delete a discount arrangement pricing rule type when it is not yet used in the system.

   Tip: Alternatively, you can delete a discount arrangement pricing rule type by clicking the **Delete** button in the **Pricing Rule Type** zone.
5. Click **OK**.
   The discount arrangement pricing rule type is deleted.

Related Topics

For more information on...	See...
Pricing Rule Type screen	Pricing Rule Type on page 2942
Pricing Rule Type List zone	Pricing Rule Type List on page 2943
Pricing Rule Type zone	Pricing Rule Type on page 2946

Viewing the Discount Arrangement Pricing Rule Type Details

Procedure

To view the details of a discount arrangement pricing rule type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **P** and then click **Pricing Rule Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Pricing Rule Type** sub-menu.
   The **Pricing Rule Type** screen appears.
4. In the **Pricing Rule Type List** zone, click the **Broadcast** () icon corresponding to the discount arrangement pricing rule type whose details you want to view.
   The **Pricing Rule Type** zone appears.
5. View the details of the discount arrangement pricing rule type in the **Pricing Rule Type** zone.

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Related Topics

For more information on...	See...
Pricing Rule Type screen	Pricing Rule Type on page 2942
Pricing Rule Type List zone	Pricing Rule Type List on page 2943
Pricing Rule Type zone	Pricing Rule Type on page 2946

Defining a Discount Arrangement Pricing Rule for a Parent Customer

Prerequisites

To define a discount arrangement pricing rule for a parent customer, you should have:

- Pricing rule type where the category is set to **Discount Arrangement**.
- Price items associated with the discount arrangement pricing rule type.

Procedure

To define a discount arrangement pricing rule for a parent customer:

1. Search for a parent customer in the **Customer 360° View** screen.
2. In the **Search Results** section, click the **View** (🔗) icon corresponding to the parent customer *w*hose pricing details you want to view.
   The **Person** tab appears in the **Customer 360° Information** screen.
3. Click the **Pricing** tab.
   The **Pricing** tab appears.
4. Click the **Add** link in the upper-right corner of the **Parent Customer Pricing Rules** zone.

   The **Pricing Rule** screen appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Person Name	Indicates the parent customer for whom you want to create a discount arrangement pricing rule type.	Not applicable
Person Type	Indicates the type of the parent customer. The valid value is: • Parent Customer	Not applicable
Pricing Rule Type	Used to indicate the pricing rule type using which you want to create a discount arrangement pricing rule.	Yes

5. Select the required pricing rule type in the respective field.
6. Click **OK**.

   The **Discount Arrangement Pricing Rule** screen appears. It contains the following sections:

   - **Customer Information** - Displays information about the parent customer for whom you are defining the discount arrangement pricing rule. It contains the following fields:

Field Name	Field Description
Parent Customer Information	Indicates the parent customer for whom you are defining the discount arrangement pricing rule.
Pricing Rule Type	Indicates the pricing rule type using which you are defining the discount arrangement pricing rule.

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- **Main** - Used to specify basic details about the discount arrangement pricing rule.
- **Discount Details** - Used to define eligibility criteria for a discount percentage and maximum discount amount which is allowed per claim.
- **Discount Limits** - Used when you want to define minimum and maximum discount limit on the contract.
- **Exclusion** - Used when you want to exclude certain network hospitals and providers during the discount share or discount guarantee calculation.
- **Characteristics** - Used to define the characteristics for the discount arrangement pricing rule.

Note: The **Discount Details**, **Discount Limits**, and **Exclusion** sections appear when you specify a price item in the **Main** section.

The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Price Item	Used to indicate the price item for which you want to define the discount arrangement pricing rule.	Yes
Pricing Start Date	Used to specify the date from when the discount arrangement pricing rule is effective. **Note:** The pricing start date cannot be later than the pricing end date.	Yes
Pricing End Date	Used to specify the date till when the discount arrangement pricing rule is effective. **Note:** The pricing end date cannot be earlier than the pricing start date.	No
Rate Option	Used to indicate the rate option that you want to use while defining the pricing for the price item.	Yes
Settlement Frequency	Used to indicate the settlement frequency which helps to determine the bill after date. The valid values are: • **Manually (At Regular Intervals)** - If you select this option from the list, the bill after date which is specified in the **Manual Settlement Bill After Date** parameter while executing the **C1-BCDA** batch is stamped on the credit billable charge. • **Yearly** - If you select this option from the list, the bill after date in the credit billable charge is set to the pricing end date. **Note:** The bill after date is stamped on the credit billable charges and not on the discount billable charges.	Yes

7. Enter the required details in the **Main** section.
8. Add the required discount details in the discount arrangement pricing rule.
9. Define the minimum and maximum discount limits on the contract in the discount arrangement pricing rule, if required.
10. Add the exclusion details of a network or a provider in the discount arrangement pricing rule, if required.
11. Define characteristics for the discount arrangement pricing rule, if required.
12. Click **Save**.
    The discount arrangement pricing rule is defined for the parent customer.

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Related Topics

For more information on...	See...
How to search for a parent customer	Searching for a Person on page 597
Parent Customer Pricing Rules zone	Parent Customer Pricing Rules on page 643
How to add the discount details in a discount arrangement pricing rule	Adding the Discount Details in a Discount Arrangement Pricing Rule on page 3235
How to define the discount limits in a discount arrangement pricing rule	Defining the Discount Limits in a Discount Arrangement Pricing Rule on page 3236
How to exclude a network or provider in a discount arrangement pricing rule	Excluding a Network or Provider in a Discount Arrangement Pricing Rule on page 3238
How to define a characteristic for a discount arrangement pricing rule	Defining a Characteristic for a Discount Arrangement Pricing Rule on page 3239

Adding the Discount Details in a Discount Arrangement Pricing Rule

Prerequisites

To add the discount details in a discount arrangement pricing rule, you should have:

- Parameters defined in the application
- Parameters associated with the price item.

Procedure

To add the discount details in a discount arrangement pricing rule:

1. Ensure that the **Discount Details** section appears when you are defining or *e*diting a discount arrangement pricing rule.

   The **Discount Details** section contains the following fields in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Price Item Parameter	Used to indicate the parameter using which you want to define an eligibility criteria for a discount percentage and maximum discount amount which is allowed per claim. **Note:** The **Search** (🔍) icon appears corresponding to the **Price Item Parameter** field. On clicking the **Search** icon, the **Price Item Parameter Search** window appears. On specifying the parameter, the description of the parameter appears corresponding to the **Price Item Parameter** field. You can only select those price item parameters which are effective during the date range specified in the discount arrangement pricing rule. If a parameter associated with the price item is mandatory, then by default, the parameter appears in the **Price Item Parameter** field.	No

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Field Name	Field Description	Mandatory (Yes or No)
Parameter Value	Used to specify the value for the price item parameter.	Yes (Conditional)
	Note: If you select a predefined parameter, the **Search** (🔍) icon appears corresponding to the **Parameter Value** field. On clicking the **Search** icon, the **Predefined Parameter Value Search** window appears. On specifying the parameter value, the description of the parameter value appears corresponding to the **Parameter Value** field.	**Note:** This field is required when the parameter associated with the price item is mandatory.
Discount Percentage	Used to specify the discount share or discount guarantee percentage.	Yes
Maximum Discount Per Claim	Used to specify the maximum discount amount which is allowed per claim. If the discount amount exceeds the maximum limit per claim, the additional amount is credited to the customer.	No

Note: The **Discount Details** section appears when you specify a price item in the **Main** section.

2. Enter the required details in the **Discount Details** section.
3. If you want to define a discount percentage for another price item parameter and parameter value combination, click the **Add** (+) icon and then repeat step 2.

Note: However, if you want to remove a discount percentage for a price item parameter and parameter value combination from the discount arrangement pricing rule, click the **Delete** (🗑) icon corresponding to the combination.

4. Click **Save**.
   The discount details are added in the discount arrangement pricing rule.

Related Topics

For more information on...	See...
How to define a discount arrangement pricing rule for a parent customer	Defining a Discount Arrangement Pricing Rule for a Parent Customer on page 3233
How to edit a discount arrangement pricing rule of a parent customer	Editing a Discount Arrangement Pricing Rule of a Parent Customer on page 3240

Defining the Discount Limits in a Discount Arrangement Pricing Rule

Prerequisites

To define the discount limits in a discount arrangement pricing rule, you should have:

- An account, to which you want to credit the discount, defined in the application
- Minimum limit pricing rule type and minimum limit price item defined in the respective discount arrangement pricing rule type when you want to define minimum discount limit on the contract
- Maximum limit pricing rule type and maximum limit price item defined in the respective discount arrangement pricing rule type when you want to define maximum discount limit on the contract

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Procedure

To define the discount limits in a discount arrangement pricing rule:

1. Ensure that the **Discount Limits** section appears when you are defining or *e*diting a discount arrangement pricing rule.

   The **Discount Limits** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
No Limit	Used to indicate whether you want to define minimum or maximum discount limit on the contract.	No
Discount Credit Account	Used to indicate the account to which you want to credit the discount when the minimum or maximum discount limit is defined on the contract. **Note:** This field is enabled when the **No Limit** option is not selected.	Yes (Conditional) **Note:** This field is required when the **No Limit** option is not selected.
Settlement Days	Used to specify the number of days which helps to calculate the final settlement date (which is pricing end date + the settlement days). The valid values: • 30 Days • 60 Days • 90 Days • 120 Days • 150 Days • 180 Days	Yes

   In addition, it contains the following fields in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Type of Discount Limit	Displays the type of discount limit. The valid values are: • Minimum • Maximum	Not applicable
Select	On clicking the check box corresponding to the type of discount limit, you can define minimum or maximum discount limit on the contract. **Note:** This field is enabled when the **No Limit** option is not selected.	Yes
Limit Type	Used to indicate whether you want to define a flat limit or an enrollment based limit. The valid values are: • Enrollment Based	Yes (Conditional)

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Field Name	Field Description	Mandatory (Yes or No)
	• Flat **Note:** This field is enabled when the **No Limit** option is not selected. If you select the check box corresponding to the **Minimum** discount limit, the **Limit Type** field corresponding to the **Minimum** discount limit is enabled.	**Note:** This field is required when you are defining a minimum or maximum discount limit in the discount arrangement pricing rule.
Amount Limit	Used to specify the flat minimum or maximum discount amount. **Note:** This field is enabled when: • The **No Limit** option is not selected. • The minimum or maximum limit type is set to **Flat**.	Yes (Conditional) **Note:** This field is required when the minimum or maximum limit type is set to **Flat**.

Note: The **Discount Limits** section appears when you specify a price item in the **Main** section.

2. Enter the required details in the **Discount Limits** section.
3. Click **Save**.
   The discount limits are defined in the discount arrangement pricing rule.

Related Topics

For more information on...	See...
How to define a discount arrangement pricing rule for a parent customer	Defining a Discount Arrangement Pricing Rule for a Parent Customer on page 3233
How to edit a discount arrangement pricing rule of a parent customer	Editing a Discount Arrangement Pricing Rule of a Parent Customer on page 3240

Excluding a Network or Provider in a Discount Arrangement Pricing Rule

Procedure

To exclude a network or provider in a discount arrangement pricing rule:

1. Ensure that the **Exclusion** section appears when you are defining or editing a discount arrangement pricing rule.

   The **Exclusion** section contains the following fields in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Exclusion Level	Used to indicate whether you want to exclude the discount offered to certain network hospitals and providers during the discount share or discount guarantee calculation. The valid values are:	Yes (Conditional)

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Field Name	Field Description	Mandatory (Yes or No)
	• Network • Provider **Note:** The system creates the transaction legs and calculation lines for such excluded network hospitals and providers, but does not accumulate the discount.	**Note:** This field is required while excluding a network or provider in the discount arrangement pricing rule.
Level Identifier	Used to specify the network or provider ID.	Yes (Conditional) **Note:** This field is required while excluding a network or provider in the discount arrangement pricing rule.

2. Enter the required details in the **Exclusion** section.
3. If you want to exclude more than one network or provider in the discount arrangement pricing rule, click the **Add** (+) icon and then repeat step 2.

Note: However, if you want to remove a network or provider from the exclusion list, click the **Delete** (🗑) icon corresponding to the network or provider.

4. Click **Save**.
   The network or provider is excluded in the discount arrangement pricing rule.

Related Topics

For more information on...	See...
How to define a discount arrangement pricing rule for a parent customer	Defining a Discount Arrangement Pricing Rule for a Parent Customer on page 3233
How to edit a discount arrangement pricing rule of a parent customer	Editing a Discount Arrangement Pricing Rule of a Parent Customer on page 3240

Defining a Characteristic for a Discount Arrangement Pricing Rule

Prerequisites

To define a characteristic for a discount arrangement pricing rule, you should have:

- Characteristic types defined in the application (where the characteristic entity is set to **Pricing Rule**).

Procedure

To define a characteristic for a discount arrangement pricing rule:

1. Ensure that the **Characteristics** section is expanded when you are defining or editing a discount *a*rrangement pricing rule.

   The **Characteristics** section contains the following fields in the grid:

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Column Name	Column Description	Mandatory (Yes or No)
Effective Date	Used to specify the date from when the characteristic is effective for the discount arrangement pricing rule.	Yes (Conditional) **Note:** This field is required when you are defining a characteristic for the discount arrangement pricing rule.
Characteristic Type	Used to indicate the characteristic type. **Note:** The list includes only those characteristic types where the characteristic entity is set to **Pricing Rule**.	Yes (Conditional) **Note:** This field is required when you are defining a characteristic for the discount arrangement pricing rule.
Characteristic Value	Used to specify the value for the characteristic type. **Note:** If you select a predefined characteristic type, the **Search** (🔍) icon appears corresponding to the **Characteristic Value** field. On clicking the **Search** icon, the **Predefined Characteristic Search** window appears. On specifying the value for a predefined characteristic type, the description of the characteristic value appears corresponding to the **Characteristic Value** field.	Yes (Conditional) **Note:** This field is required when you are defining a characteristic for the discount arrangement pricing rule.

2. Enter the required details in the **Characteristics** section.
3. If you want to define more than one characteristic for the discount arrangement pricing rule, click the **Add** (+) icon and then repeat step 2.

> **Note:** However, if you want to remove a characteristic from the discount arrangement pricing rule, click the **Delete** (🗑) icon corresponding to the characteristic.

4. Click **Save**.
   The characteristics are defined for the discount arrangement pricing rule.

Related Topics

For more information on...	See...
How to define a discount arrangement pricing rule for a parent customer	Defining a Discount Arrangement Pricing Rule for a Parent Customer on page 3233
How to edit a discount arrangement pricing rule of a parent customer	Editing a Discount Arrangement Pricing Rule of a Parent Customer on page 3240

Editing a Discount Arrangement Pricing Rule of a Parent Customer

Procedure

To edit a discount arrangement pricing rule of a parent customer:

1. Search for a parent customer in the **Customer 360° View** screen.

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2. In the **Search Results** section, click the **View** (🔗) icon corresponding *t*o the parent customer whose pricing details you want to view.
   The **Person** tab appears in the **Customer 360° Information** screen.
3. Click the **Pricing** tab.
   The **Pricing** tab appears.
4. In the **Parent Customer Pricing Rules** zone, click the **Edit** (✎) icon in the **Edit** column corresponding to the discount arrangement pricing rule, whose details you want to edit.

   The **Discount Arrangement Pricing Rule** screen appears. It contains the following sections:

   - **Customer Information** - Displays information about the parent customer for whom the discount arrangement pricing rule is defined. It contains the following fields:

Field Name	Field Description
Parent Customer Information	Indicates the parent customer for whom the discount arrangement pricing rule is defined.
Pricing Rule Type	Indicates the discount arrangement pricing rule type using which the discount arrangement pricing rule is defined.

   - **Main** - Used to specify basic details in the discount arrangement pricing rule.
   - **Discount Details** - Used to define eligibility criteria for a discount percentage and maximum discount amount which is allowed per claim.
   - **Discount Limits** - Used when you want to define minimum and maximum discount limit on the contract.
   - **Exclusion** - Used when you want to exclude certain network hospitals and providers during the discount share or discount guarantee calculation.
   - **Characteristics** - Used to define the characteristics for the discount arrangement pricing rule.

   The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Price Item	Used to indicate the price item for which you want to define the discount arrangement pricing rule.	Yes
Pricing Start Date	Used to specify the date from when the discount arrangement pricing rule is effective. **Note:** The pricing start date cannot be later than the pricing end date.	Yes
Pricing End Date	Used to specify the date till when the discount arrangement pricing rule is effective. **Note:** The pricing end date cannot be earlier than the pricing start date.	No
Rate Option	Used to indicate the rate option that you want to use while defining the pricing for the price item.	Yes
Settlement Frequency	Used to indicate the settlement frequency which helps to determine the bill after date. The valid values are: • **Manually (At Regular Intervals)** - If you select this option from the list, the bill after date which is specified in the **Manual Settlement Bill After Date** parameter while executing the **C1-BCDA** batch is stamped on the credit billable charge.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	• **Yearly** - If you select this option from the list, the bill after date in the credit billable charge is set to the pricing end date. **Note:** The bill after date is stamped on the credit billable charges and not on the discount billable charges.	

5. Modify the required details in the **Main** section.
6. Modify the required discount details in the discount arrangement pricing rule.
7. Modify the minimum or maximum discount limit on the contract in the discount arrangement pricing rule, if required.
8. Modify the exclusion list in the discount arrangement pricing rule, if required.
9. Define, edit, or remove characteristics of the discount arrangement pricing rule, if required.
10. Click **Save**.
    The changes made to the discount arrangement pricing rule are saved.

Related Topics

For more information on...	See...
How to search for a parent customer	Searching for a Person on page 597
Parent Customer Pricing Rules zone	Parent Customer Pricing Rules on page 643
How to add the discount details in a discount arrangement pricing rule	Adding the Discount Details in a Discount Arrangement Pricing Rule on page 3235
How to define the discount limits in a discount arrangement pricing rule	Defining the Discount Limits in a Discount Arrangement Pricing Rule on page 3236
How to exclude a network or provider in a discount arrangement pricing rule	Excluding a Network or Provider in a Discount Arrangement Pricing Rule on page 3238
How to define a characteristic for a discount arrangement pricing rule	Defining a Characteristic for a Discount Arrangement Pricing Rule on page 3239

Deleting a Discount Arrangement Pricing Rule of a Parent Customer

Procedure

To delete a discount arrangement pricing rule of a parent customer:

1. Search for a parent customer in the **Customer 360° View** screen.
2. In the **Search Results** section, click the **View** (🔗) icon corresponding to the parent customer *w*hose pricing details you want to view.
   The **Person** tab appears in the **Customer 360° Information** screen.
3. Click the **Pricing** tab.
   The **Pricing** tab appears.
4. In the **Parent Customer Pricing Rules** zone, click the **Delete** (🗑) icon in the **Delete** column corresponding to the discount arrangement pricing rule that you want to delete.
   A message appears confirming whether you want to delete the discount arrangement pricing rule.

Note: You can delete a discount arrangement pricing rule when it is not yet used in the system.

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5. Click **OK**.
   The discount arrangement pricing rule of a parent customer is deleted.

Related Topics

For more information on...	See...
How to search for a parent customer	Searching for a Person on page 597
Parent Customer Pricing Rules zone	Parent Customer Pricing Rules on page 643

Viewing the Discount Arrangement Pricing Rule Details of a Parent Customer

Procedure

To view the discount arrangement pricing rule details of a parent customer:

1. Search for a parent customer whose pricing details you want to view in the **Customer 360° View** screen.
2. In the **Search Results** section, click the **View** (🔗) icon corresponding to the parent customer whose pricing details you want to view.
   The **Person** tab appears in the **Customer 360° Information** screen.
3. Click the **Pricing** tab.
   The **Pricing** tab appears.
4. In the **Parent Customer Pricing Rules** zone, click the link in the **Pricing Rule Information** column corresponding to the pricing rule type whose details you want to view.
   The **Pricing Rule** screen appears. It contains the following zone:
   - **Discount Arrangement** - Displays the discount arrangement pricing rule of a parent customer. It contains the following sections:
     - **Main** - Displays basic details of the discount arrangement pricing rule.
     - **Discount Details** - Displays the eligibility criteria for a discount percentage and maximum discount amount that is allowed per claim.
     - **Discount Limits** - Displays the minimum and maximum discount limit defined on the contract.
     - **Exclusions** - Displays the entity (network or provider) which is excluded in the discount arrangement pricing rule.
     - **Characteristics** - Displays the characteristics defined for the discount arrangement pricing rule.
5. View the basic details of the discount arrangement pricing rule in the **Main** section.
6. View the discount details of the discount arrangement pricing rule in the **Discount Details** section.
7. View the discount limits set on the discount arrangement pricing rule in the **Discount Limits** section.
8. View the excluded entity defined for the discount arrangement pricing rule in the **Exclusions** section.
9. View the characteristics of the discount arrangement pricing rule in the **Characteristics** section.

Related Topics

For more information on...	See...
Customer 360° Information - Pricing tab	Customer 360° Information - Pricing Information on page 641
Parent Customer Pricing Rules zone	Parent Customer Pricing Rules on page 643
Pricing Rule screen	Pricing Rule (Used for Viewing) on page 689
Discount Arrangement zone	Discount Arrangement on page 710

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Write-Off Charges during Post Runout

Oracle Revenue Management and Billing enables you to write-off the claim, specific stop-loss, aggregate stop-loss, claim based fees, enrollment based fees, ancillary, discount, and funds charges when the bill is generated in the post runout period of the policy. In this case, a write-off adjustment is created against the respective bill segment during the post bill completion. The write-off adjustment is created using the post runout write-off adjustment type which is specified in the respective pricing rule type.

To enable this feature, you need to do the following:

1. Set the **Eligible for Write-Off in Post Runout** field in the respective pricing rule type to **Yes**.
2. Specify the post runout write-off adjustment type in the respective pricing rule type.
3. Attach the **C1-PRCRLWOFF** algorithm to the **Post-Bill Completion** system event in the customer class of the accounts for which you want to write-off the charges in the post runout period of the policy.

Level Funding Pricing

Level funding is a type of self-funding. It offers all benefits of traditional self-funding. However, it provides one additional benefit which helps to stabilize monthly costs of the self-funded employer to pay off the claim, ancillary, claim based fee, enrollment based fee, and discount charges.

Oracle Revenue Management and Billing enables you to process and bill the funds charges to the self-funded employer in either of the following ways:

- Pay the fixed flat amount in every bill period
- Pay the amount based on the enrollment based limit in every bill period

The system enables you to define whether the price items included in the claim, retention type claim based, retention type enrollment based, ancillary, and discount pricing rule types are eligible for level funding. If the price items are eligible for level funding, you can then include them in the level funding pricing rule type indicating that the charges for these price items will not be included in the respective billable charge (for example, claim billable charge), but it would be settled against the funds billable charge. While adjusting such charges against the funds billable charge, there might be some surplus or deficit in funds at the time of settlement which is ideally at the end of year. In such case, the system enables you configure whether a flat amount or percentage of surplus should be retained by the ASO provider or whether a flat amount or percentage of deficit is offered as a discount to the self-funded employer.

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

- Business object using which the level funding pricing rule should be created in the system.

  Note: You must not select the **Primary** option while defining a level funding pricing rule type.

- Algorithm which should be triggered for deriving the account and price item while creating the funds transaction legs.

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

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

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

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- Additional generic information, such as:
  - Whether the funds charge should be written off when the bill is generated in the post runout period of the policy. In this case, a write-off adjustment is created against the respective bill segment during the post bill completion. The write-off adjustment is created using the post runout write-off adjustment type which is specified in the level funding pricing rule type.
  - Transaction field which you want to use in the rules as the output parameter to determine whether the price item should be considered for billing.
  - Value which the output parameter in the rule should return when the price item in the level funding pricing rule type should be considered for processing.
- Price items for which you can define level funding pricing rules using the level funding pricing rule type.
- Rate options that you can use while defining the pricing for the level funded price items.
- Different type of account to which a price item should be billed based on the specified priority.
- Rule type which indicates the rules that should be executed to determine whether the price item is eligible for billing.
- Additional level funding specific information, such as:
  - Whether the level funding premium (i.e. funds) should be calculated using the bill period based recurring flat fee pricing rule or using the retention type enrollment based pricing rule.
  - Bill period based recurring flat fee pricing rule type or retention type enrollment based pricing rule type which you want to use for calculating the level funded premium.
  - Price item whose pricing you want to use for calculating the level-funded premium.
  - LF billable charge line type using which you want to create billable charges for level funded premium.
  - GL only contract type which indicates the contract against which the claim, ancillary, claim based fees, enrollment based fees, and discount charges that are settled against the funds must be debited. The distribution code on the GL only contract type will indicate the GL account against which charges settled against the funds must be debited.
  - Liability distribution code will indicate the GL account against which charges settled against the funds must be credited.
  - Number of days before which you want to create a To Do for reminding the self-funded employer to renew the level funded agreement.
  - Surplus billable charge line type using which you want to create the billable charge when the surplus funds are left with the ASO provider at the time of settlement.
  - Deficit billable charge line type using which you want to create the billable charge when the funds are in deficit at the time of settlement.
  - Domestic provider billable charge line type using which you want to create billable charges for the claim, claim based fees, enrollment based fees, ancillary, and discount charges which are settled against the funds for a domestic provider.
  - Markup or markdown billable charge line type using which you want to create billable charges for markup or markdown which are settled against the funds.
  - Rule type which indicates the rules that should be executed to determine whether the markup or markdown calculation line is eligible for billing.
  - Transaction field which you want to use in the rules as the output parameter to determine whether the markup or markdown calculation line is eligible for billing.
  - Rule type which indicates the rules that should be executed to determine whether the level funded premium is for a domestic provider.
  - Transaction field which you want to use in the rules as the output parameter to determine whether the level funded premium is for a domestic provider.

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

- Price item for which you want to define the pricing.
- Specific stop-loss pricing rule of the parent customer whose accumulation parameters you want to inherit for the level funding. On selecting a specific stop-loss pricing rule, the level funding pricing date range is set automatically. The level funding pricing date range is same as the specific stop-loss pricing rule.
- Rate option which you want to use while defining the level funding pricing.

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- Settlement frequency which helps to determine the bill after date. The valid values are:
  - **Immediately** - If you select this option from the list, the bill after date is not calculated. The funds billable charge is billed immediately in the next bill cycle.
  - **Manually (At Required Intervals)** - If you select this option from the list, the bill after date which is specified in the **Manual Settlement Bill After Date** parameter while executing the **C1-BCLF** batch is stamped on the funds billable charge.
  - **Never** - If you select this option from the list, the bill after date which is specified in the **Manual Settlement Bill After Date** parameter while executing the **C1-BCLF** batch is stamped on the funds billable charge.
  - **Yearly** - If you select this option from the list, the bill after date is set to the pricing end date in the funds billable charge.
  - **On Settlement** - If you select this option from the list, the bill after date is set to the settlement date in the funds billable charge.

Note: The accumulation parameters, such as incurred start date, incurred end date, paid start date, paid end date, and settlement days are automatically inherited from the parent customer's specific stop-loss pricing rule. You cannot change any accumulation parameter except the settlement days.

- Settlement days which helps to calculate the settlement date (which is pricing end date, incurred end date, or paid end date whichever is later + the settlement days)
- Whether the customer would like to renew or cancel the level funded agreement.
- Whether a flat amount or percentage of surplus should be retained by the ASO provider at the time of settlement.
- Whether a flat amount or percentage of deficit should be offered as discount to the self-funded employer at the time of settlement.

However, while defining a level funding pricing rule for a bill group, you need to specify the following:

- The policy status in which the level funding pricing rule is applicable.
- Price item for which you want to define the pricing.
- Parent customer's level funding pricing rule from which you want to inherit the accumulation parameters.

Note:

The pricing date range is derived from the parent customer's level funding pricing rule because the level funding pricing rules for parent customer and bill group should have the same date range.

The settlement fund price item is derived from the level funding pricing rule type using which the level funding pricing rule is created.

- Rate option which you want to use while defining the level funding pricing.
- Price items whose charges should be accumulated against the level funded price items so that it can be settled against the funds.
- Whether the line items and markup or markdown in a particular claim pricing rule should be accumulated.

  OR

  Whether the line items which are associated with the **Level Funded** pricing rule type category should be accumulated.
- Whether the charges created using the billable charge line types in a particular ancillary pricing rule should be accumulated.

  OR

  Whether the charges created using the billable charge line types where the **Pricing Rule Type Category** characteristic is set to **Ancillary** should be accumulated.
- Whether the discount calculated using a particular discount arrangement pricing rule should be accumulated.
- Whether the charges calculated using the retention type claim based or retention type enrollment based pricing for a price item should be accumulated.

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You can also specify a pricing group while defining a level funding pricing rule for a bill group. Once a level funding pricing rule is defined for a bill group, the system creates a price assignment in a price list and assigns the price list to the bill group.

The following new batches are introduced in this release:

- **C1-ACLF** - This batch is used to accumulate the charges which are to be settled against the funds. During the accumulation post-processing, the level funded billable charges (which are created through the TFM process) are posted against the GL accounts which are derived using the GL only contract type and liability distribution code information in the level funding pricing rule type. For more information about the batch, refer to *Oracle Revenue Management and Billing Batch Guide*.
- **C1-BCLF** - Once the level funded billable charges are accumulated, this batch is used to create the accumulated level funded billable charges. It is also used to calculate the bill after date. For more information about the batch, refer to *Oracle Revenue Management and Billing Batch Guide*.

Terminal Liability Reserve (Run Out) Level Funding Pricing

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

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

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

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

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

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

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

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

Defining a Level Funded Pricing Rule Type

Prerequisites

To define a level funded pricing rule type, you should have:

- Level Funded Pricing Rule Type business object defined in the application.
- Level Funded Pricing Rule business object defined in the application.

Procedure

To define a level funded pricing rule type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **P** and then click **Pricing Rule Type**.
   A sub-menu appears.
3. Click the **Add** option from the **Pricing Rule Type** sub-menu.

   The **Select Business Object** screen appears. It contains the following field:

Field Name	Field Description	Mandatory (Yes or No)
Pricing Rule Type Business Object	Used to indicate the business object using which you want to create a level funded pricing rule type. **Note:** You can create a discount arrangement pricing rule type using the **Level Funded Pricing Rule Type (C1-PricingRuleTypeDA)** business object.	Yes

Tip: Alternatively, you can access this screen by clicking the **Add** button in the **Page Title** area of the **Pricing Rule Type** screen.

4. Select the **Level Funded (LF) Pricing Rule Type** option from the **Pricing Rule Type Business Object** list.
5. Click **OK**.

   The **Level Funded Pricing Rule Type** screen appears. It contains the following sections:

   - **Main** - Used to specify the basic details about the level funded pricing rule type.
   - **Algorithms** - Used to associate the algorithms with a level funded pricing rule type.
   - **Additional Data** - Used to specify the additional information about the level funded pricing rule type.
   - **Price Items** - Used to add the price items for which you can define the level funded pricing rules using the level funded pricing rule type.
   - **Price Item Parameters** - Used to add the price item parameters based on which you want to define the price item pricing.
   - **Characteristics** - Used to define the characteristics for a level funded pricing rule type.
   - **DA - Specific Additional Data** - Used to define the level funded - specific additional data in a discount arrangement pricing rule type.

   The **Main** section contains the following fields:

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Field Name	Field Description	Mandatory (Yes or No)
Pricing Rule Type	Used to specify the level funded pricing rule type.	Yes
Description	Used to specify the description for the level funded pricing rule type.	Yes
Detailed Description	Used to specify additional information about the level funded pricing rule type.	No
Pricing Rule Business Object	Used to indicate the business object using which you want to create the level funded pricing rule. The valid value is: • Level Funded (LF) Pricing Rule	Yes
Business Object	Indicates the business object using which you are defining the level funded pricing rule type.	Not applicable
Status	Used to indicate the status of the level funded pricing rule type. The valid values are: • Active • Inactive	Yes
Primary	Used to indicate whether the pricing rule type is a primary pricing rule type. **Note:** You must not select the **Primary** option while defining a level funded pricing rule type.	Not applicable
Pricing Rule Type Category	Used to indicate the category to which the pricing rule type belongs. The valid value is: • Level Funded	Yes

6. Enter the required details in the **Main** section.
7. Ensure that **Primary** option is not selected when you are defining a level funded pricing rule type.
8. Associate the following algorithms with the discount arrangement pricing rule type:

System Event	Algorithm	Algorithm Type	Description
Account and Price Item Derivation	C1_ACCPRISL	C1_ACCPRIDIS	Account and Priceitem Derivation For Level Funded
Accumulation Post Processing	C1-LFACPOST	C1-LFACPOST	Level Funded Accumulation Post Processing

9. Define additional data for a level funded pricing rule type, if required.
10. Add the required price items in the level funded pricing rule type.
11. Add the price item parameters in the level funded pricing rule type, if required.
12. Define characteristics for a level funded pricing rule type, if required.
13. Add level funded-specific additional data in the level funded pricing rule type.
14. Click **Save**.
    The level funded pricing rule type is defined.

Related Topics

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For more information on...	See...
How to associate algorithms with the level funded pricing rule type	Associating an Algorithm with a Level Funded Pricing Rule Type on page 3250
How to define additional data for a level funded pricing rule type	Defining Additional Data in a Level Funded Pricing Rule Type on page 3251
How to add price items in the level funded pricing rule type	Adding a Price Item in a Level Funded Pricing Rule Type on page 3253
How to add price item parameters in the level funded pricing rule type	Adding a Price Item Parameter in a Level Funded Pricing Rule Type on page 3255
How to define a characteristic for a level funded pricing rule type	Defining a Characteristic for a Level Funded Pricing Rule Type on page 3257
How to add level funded - specific data in the discount arrangement pricing rule type	Defining the Level Funded Specific Additional Data in a Level Funded Pricing Rule Type on page 3258

Associating an Algorithm with a Level Funded Pricing Rule Type

Prerequisites

To associate algorithms with a level funding pricing rule type, you should have:

- An algorithm defined using the **C1_ACCPRIDIS** algorithm type.

Procedure

To associate algorithms with a discount arrangement pricing rule type:

1. Ensure that the **Algorithms** section is expanded when you are defining or editing the discount *a*rrangement pricing rule type.

   The **Algorithms** section contains the following columns in a grid:

Column Name	Column Description	Mandatory (Yes or No)
System Event	Used to indicate the system event when you want to invoke the algorithm. The valid values are: • Account and Price Item Derivation • Accumulation Billable Charge Post Proc • Accumulation Billable Charge Pre Proc • Accumulation Post Processing • Accumulation Pre Processing • Pricing Rule Post Processing • Transaction Validation	Yes **Note:** This field is required when you are associating an algorithm with the discount arrangement pricing rule type.
Sequence	Used to specify the order in which the algorithms for each system event must be executed.	Yes (Conditional) **Note:** This field is required when you are associating an algorithm with the discount arrangement pricing rule type.
Algorithm	Used to specify the algorithm.	Yes (Conditional)

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Column Name	Column Description	Mandatory (Yes or No)
	Note: Once you select the system event, the **Search** (🔍) icon appears corresponding to the **Algorithm** field. On clicking the **Search** (🔍) icon, the **Algorithm Search** window appears. On specifying the algorithm, the description of the algorithm appears corresponding to the **Algorithm** field.	**Note:** This field is required when you are associating an algorithm with the discount arrangement pricing rule type.

2. Enter the following details in the **Algorithms** section:

System Event	Sequence	Algorithm
Account and Price Item Derivation	10	C1_ACCPRIDIS

3. If you want to associate more than one algorithm with the discount arrangement pricing rule type, click the **Add** (+) icon and then repeat step 2.

Note: However, if you want to disassociate an algorithm from the discount arrangement pricing rule type, click the **Delete** (🗑) icon corresponding to the algorithm.

4. Click **Save**.
The algorithms are associated with the discount arrangement pricing rule type.

Related Topics

For more information on...	See...
How to define the discount arrangement pricing rule type	Defining a Discount Arrangement Pricing Rule Type on page 3215
How to edit the discount arrangement pricing rule type	Editing a Discount Arrangement Pricing Rule Type on page 3229

Defining Additional Data in a Level Funded Pricing Rule Type

Procedure

To define additional data in a level funded pricing rule type:

1. Ensure that the **Additional Data**section is expanded when you are defining *or* editing a level funded pricing rule type.

The **Additional Data** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Eligible for Specific Stop-Loss	Used to indicate whether price items included in the level funded pricing rule type are eligible for specific stop-loss. The valid values are: • Yes • No	No
Eligible for Level Funding	Used to indicate whether price items included in the level funded pricing rule type are eligible for level funding. The valid values are:	No

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Field Name	Field Description	Mandatory (Yes or No)
	• Yes • No	
Run-in Identifier Value	Used to specify the identifier value to determine whether the level funded transaction is received during the run-in period of the policy.	No
Third Party Identifier Value	Used to specify the identifier value to determine whether the level funded transaction is received from an external source system.	No
Accumulation Only Identifier Value	Used to specify the identifier value to determine whether the level funded transaction contains the accumulated information of ASL, SSL, and Level Funding pricing types.	No
Eligible for Write-Off in Post Runout	Used to indicate whether the level funded charges should be written off when the bill is generated in the post runout period of the policy. The valid values are: • Yes • No **Note:** For more information, refer to the Write-Off Charges during Post Runout section.	No
Post Runout Write-Off Adjustment Type	Used to specify the adjustment type using which you want to create post runout write-off adjustment. **Note:** This field appears when the **Eligible for Write-Off in Post Runout** field is set to **Yes**. The **Search** (🔍) icon appears corresponding to the **Post Runout Write-Off Adjustment Type** field. On clicking the **Search** icon, the **Adjustment Type Search** window appears. On specifying the adjustment type, the description of the adjustment type appears corresponding to the **Eligible for Write-Off in Post Runout** field.	Yes (Conditional) **Note:** This field is required when the **Eligible for Write-Off in Post Runout** field is set to **Yes**.
Rule Based Price Item Eligibility Field	Used to indicate the transaction field which you want to use in the rules as the output parameter to determine whether the price item should be considered for billing.	No

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Field Name	Field Description	Mandatory (Yes or No)
	Note: For more information, refer to the Price Item Eligibility on page 3315 section. This field appears when the **Eligible for Write-Off in Post Runout** field is set to **Yes**. The **Search** (🔍) icon appears corresponding to the **Rule Based Price Item Eligibility Field** field. On clicking the **Search** icon, the **Field Search** window appears. On specifying the field name, the description of the field name appears corresponding to the **Rule Based Price Item Eligibility Field**.	
Rule Based Eligibility Value	Used to specify the value which the output parameter in the rule should return when the price item in the discount arrangement pricing rule type should be considered for processing.	Yes (Conditional) **Note:** This field is required when a value is specified in the **Rule Based Price Item Eligibility Field** field.

2. Enter the required details in the **Additional Data** section.
3. Click **Save**.
   The additional data is defined for the pricing rule type.

Related Topics

For more information on...	See...
How to define a level funded pricing rule type	Defining a Level Funded Pricing Rule Type on page 3248
How to edit a level funded pricing rule type	Editing a Level Funded Pricing Rule Type on page 3262

Adding a Price Item in a Level Funded Pricing Rule Type

Prerequisites

To add a price item in a level funded pricing rule type, you should have:

- Price item defined in the application
- Rate options defined in the **Rate Option (C1-ExtLookRetTypeRateOpt)** extendable lookup
- Values defined for the **Invoice Type (C1INVTYP)** characteristic type
- The **C1INVTYP** characteristic type set in the **Invoice Type Characteristic Type** option type of the **C1-ASOBLLNG** feature configuration
- Rule types defined in the application (where the rule type usage is set to **Price Item Eligibility**)

Procedure

To add a price item in a level funded pricing rule type:

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1. Ensure that the **Price Items** section is expanded when you are defining or editing a *l*evel funded pricing rule type.

   The **Price Items** section contains the following fields in a grid:

<table>
<tr><th>Field Name</th><th>Field Description</th><th>Mandatory (Yes or No)</th></tr>
<tr><td>Price Item</td><td>Used to indicate the price item that you want to include in the level funded pricing rule type.

Note:
The Search (🔍) icon appears corresponding to the Price Item field. On clicking the Search icon, the Price Item Search window appears.
On specifying the price item, the description of the price item appears corresponding to the Price Item field.</td><td>Yes (Conditional)

Note: This field is required when you are adding a rate option and bill to account in the level funded pricing rule type.</td></tr>
<tr><td>Rate Option</td><td>Used to indicate one or more rate options which are valid for a price item.
On clicking the Add (➕) icon, the following field appears in a grid:
<table><tr><th>Field Name</th><th>Field Description</th><th>Mandatory (Yes or No)</th></tr><tr><td>Rate Option</td><td>Used to indicate the rate option that you want to use while defining pricing for the price item.</td><td>Yes</td></tr></table>
Note:
If you want to define more than one rate option to the price item in the level funded pricing rule type, click the Add (+) icon.
However, if you want to remove a price item from a level funded pricing rule type, click the Delete (🗑) icon corresponding to the Rate Option field.</td><td>Not applicable</td></tr>
<tr><td>Bill To Account</td><td>Used to indicate a order in which the account should be considered while deriving a transaction leg.
On clicking the Add (➕) icon, the following fields appear in a grid:
<table><tr><th>Field Name</th><th>Field Description</th><th>Mandatory (Yes or No)</th></tr><tr><td>Priority</td><td>Used to specify the order in which the invoice type is considered for a price item.</td><td>Yes</td></tr><tr><td>Invoice Type</td><td>Used to indicate the type which is considered for billing. For more information, refer to the Bill Group's Account on page 13 section.</td><td>Yes</td></tr></table></td><td>Not applicable</td></tr>
</table>

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<table>
<tr><th>Field Name</th><th>Field Description</th><th>Mandatory (Yes or No)</th></tr>
<tr><td></td><td>
<table>
<tr><th>Field Name</th><th>Field Description</th><th>Mandatory (Yes or No)</th></tr>
<tr><td></td><td>Note: The Search (🔍) icon appears corresponding to the Invoice Type field. On clicking the Search icon, the Invoice Type Search window appears.</td><td></td></tr>
</table>
Note:
If you want to define more than one invoice type to the price item in a level funded pricing rule type, click the Add (+) icon.
However, if you want to remove a invoice type from the price item in a level funded pricing rule type, click the Delete (🗑) icon corresponding to the Priority field.
</td><td></td></tr>
<tr><td>Eligibility Rule Type</td><td>Used to indicate the rule type which indicates the rules that should be executed to determine whether the price item is eligible for billing.</td><td>No</td></tr>
</table>

2. Enter the required details in the **Price Items** section.
3. If you want to define more than one price item in a level funded pricing rule type, click the **Add** (+) icon and then repeat step 2.

> **Note:** However, if you want to remove a price item from a level funded pricing rule type, click the **Delete** (🗑) icon corresponding to the **Price Item** field.

4. Click **Save**.
   The price items are added for a level funded pricing rule type.

Related Topics

For more information on...	See...
How to define a level funded pricing rule type	Defining a Level Funded Pricing Rule Type on page 3248
How to edit a level funded pricing rule type	Editing a Level Funded Pricing Rule Type on page 3262

Adding a Price Item Parameter in a Level Funded Pricing Rule Type

Prerequisites

To add a price item parameter in a level funded pricing rule type, you should have:

- Parameter defined in the application where parameter usage is set to **Price Item**.
- Parameter associated with the price item.
- Transaction fields defined in the application.

Procedure

To add a price item parameter in a level funded pricing rule type:

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1. Ensure that the **Price Item Parameters** section is expanded when you are defining or *e*diting a level funded pricing rule type.

   The **Price Item Parameters** section contains the following fields in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Price Item Parameter	Used to specify the parameter which you can use while defining a level funded pricing for the price item. **Note:** The **Search** (🔍) icon appears corresponding to the **Price Item Parameter** field. On clicking the **Search** (🔍) icon corresponding to the **Price Item Parameter** field, the **Parameter Search** window appears. On specifying the parameter, the description of the price item parameter appears corresponding to the **Price Item Parameter** field.	Yes (Conditional) **Note:** This field is required when you are adding a price item parameter in a level funded pricing rule type.
Transaction Field	Used to specify the transaction field from where the data should be retrieved. **Note:** The **Search** (🔍) icon appears corresponding to the **Transaction Field** field. On clicking the **Search** (🔍) icon corresponding to the **Transaction Field** field, the **Transaction Field Search** window appears. On specifying the transaction field, the description of the transaction field appears corresponding to the **Transaction Field**.	Yes (Conditional) **Note:** This field is required when you are adding a price item parameter in a level funded pricing rule type.
Eligible for Specific Stop-Loss	Used to indicate whether the price item parameter can be used while defining the accumulation criteria in the specific stop-loss or aggregate stop-loss pricing rule.	No
Eligible for Level Funding	Used to specify whether the price item parameter can be used in level funding.	No

2. Enter the required details in the **Price Item Parameters** section.
3. If you want to add more than one price item parameter in a level funded pricing rule type, click the **Add** (+) icon and then repeat step 2.

   Note: However, if you want to remove a price item parameter from a level funded pricing rule type, click the **Delete** (🗑) icon corresponding to the price item parameter.

4. Click **Save**.
   The price item parameter is added for a level funded pricing rule type.

Related Topics

For more information on...	See...
How to define a level funded pricing rule type	Defining a Level Funded Pricing Rule Type on page 3248

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For more information on...	See...
How to edit a level funded pricing rule type	Editing a Level Funded Pricing Rule Type on page 3262

Defining a Characteristic for a Level Funded Pricing Rule Type

Prerequisites

To define a characteristic for a level funded pricing rule type, you should have:

- Characteristic types defined in the application (where the characteristic entity is set to **Pricing Rule Type**)

Procedure

To define a characteristic for a level funded pricing rule type:

1. Ensure that the **Characteristics** section is expanded when you are defining or editing a discount *a*arrangement pricing rule type.

   The **Characteristics** section contains the following columns in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Characteristic Type	Used to indicate the characteristic type.	Yes (Conditional)
	Note: The list includes only those characteristic types where the characteristic entity is set to **Pricing Rule Type**.	**Note:** This field is required when you are defining a characteristic for a level funded pricing rule type.
Characteristic Value	Used to specify the value for the characteristic type.	Yes (Conditional)
	Note: On specifying the value for a predefined characteristic type, the description of the characteristic value appears corresponding to the **Characteristic Value** field.	**Note:** This field is required when you are defining a characteristic for a level funded pricing rule type.

2. Enter the required details in the **Characteristics** section.

   Note: If you select a predefined characteristic type, the **Search** (🔍) icon appears corresponding to the **Characteristic Value** field. On clicking the **Search** icon, you can search for a predefined characteristic value.

3. If you want to define more than one characteristic for a level funded pricing rule type, click the **Add** (+) icon and then repeat step 2.

   Note: However, if you want to remove a characteristic from a level funded pricing rule type, click the **Delete** (🗑) icon corresponding to the characteristic.

4. Click **Save**.
   The characteristics are defined for a level funded pricing rule type.

Related Topics

For more information on...	See...
How to define a level funded pricing rule type	Defining a Level Funded Pricing Rule Type on page 3248

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For more information on...	See...
How to edit a level funded pricing rule type	Editing a Level Funded Pricing Rule Type on page 3262

Defining the Level Funded Specific Additional Data in a Level Funded Pricing Rule Type

Prerequisites

To define level funded specific additional data in a level funded pricing rule type, you should have:

- A rule type defined for **Markup or Markdown Eligibility Rule Type** and **Domestic Provider Eligibility Rule Type** field.

Procedure

To add the level-funded data in a level funded pricing rule type:

1. Ensure that the **Level Funded - Specific Additional Data** section is expanded when you are defining or *e*diting a level funded pricing rule type.

   The **Level Funded - Specific Additional Data** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Funding Arrangement	Used to indicate whether the level-funded premium (i.e. funds) should be calculated using the bill period based recurring flat fee pricing rule or using the retention type enrollment based pricing rule. The valid values are: • Enrollment Based Premium • Flat Rate Based Premium	Yes
Settlement Fund Pricing Rule Type	Used to indicate the bill period based recurring flat fee pricing rule type or the retention type enrollment based pricing rule type which you want to use for calculating the level-funded premium. **Note:** The **Search** (🔍) icon appears corresponding to the **Settlement Fund Pricing Rule Type** field. On clicking the **Search** (🔍) icon corresponding to the **Settlement Fund Pricing Rule Type** field, the **Contract Type Search** window appears. On specifying the contract type, the description of the contact type appears corresponding to the **Settlement Fund Pricing Rule Type** field.	Yes
Settlement Fund Price Item	Used to indicate the price item that you want to use for calculating the level-funded premium.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The **Search** (🔍) icon appears corresponding to the **Settlement Fund Price Item** field. On clicking the **Search** (🔍) icon corresponding to the **Settlement Fund Price Item** field, the **Price Item Details** window appears. On specifying the price item details, the description of the price item details appears corresponding to the **Settlement Fund Price Item** field.	
LF Billable Charge Line Type	Used to indicate the level funded billable charge line type using which you want to create the billable charges for level-funded settlement purposes. **Note:** The **Search** (🔍) icon appears corresponding to the **LF Billable Charge Line Type** field. On clicking the **Search** (🔍) icon corresponding to the **LF Billable Charge Line Type** field, the **Billable Charge Line Type Search** window appears. On specifying the billable charge line type, the description of the billable charge line type appears corresponding to the **Billable Charge Line Type Search** field.	Yes
GL Only Contract Type	Used to indicate the contract against which the level-funded billable charges for claim, ancillary, claim based fees, enrollment based fees, discount, specific stop-loss, and aggregate stop-loss must be debited. **Note:** The **Search** (🔍) icon appears corresponding to the **GL Only Contract Type** field. On clicking the **Search** (🔍) icon corresponding to the **GL Only Contract Type** field, the **Contract Type Search** window appears.	Yes
Liability Distribution Code	Used to indicate the GL account against which the level-funded billable charges (that are settled against the level-funded premium billable charge) must be credited. **Note:** The **Search** (🔍) icon appears corresponding to the **Liability Distribution Code** field. On clicking the **Search** (🔍) icon corresponding to the **Liability Distribution Code** field, the **Distribution Code Search** window appears. On specifying the distribution code, the description of the distribution code appears corresponding to the **Liability Distribution Code** field.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
Renewal Decision Lead Time	Used to specify the number of days before which you want to create a To Do for reminding the self-funded employer to renew the level-funded agreement.	Yes
Surplus Billable Charge Line Type	Used to indicate the surplus billable charge line type using which you want to create the billable charge when the surplus funds are left with the ASO provider at the time of settlement. **Note:** The **Search** (🔍) icon appears corresponding to the **Surplus Billable Charge Line Type** field. On clicking the **Search** (🔍) icon corresponding to the **Surplus Billable Charge Line Type** field, the **Billable Charge Line Type Search** window appears. On specifying the billable charge line type, the description of the billable charge line type appears corresponding to the **Surplus Billable Charge Line Type** field.	Yes
Deficit Billable Charge Line Type	Used to indicate the deficit billable charge line type using which you want to create the billable charge when the funds are in deficit at the time of settlement. **Note:** The **Search** (🔍) icon appears corresponding to the **Deficit Billable Charge Line Type** field. On clicking the **Search** (🔍) icon corresponding to the **Deficit Billable Charge Line Type** field, the **Billable Charge Line Type Search** window appears. On specifying the billable charge line type, the description of the billable charge line type appears corresponding to the **Deficit Billable Charge Line Type** field.	Yes
Domestic Provider Billable Charge Line Type	Used to indicate the domestic provider billable charge line type using which you want to create level-funded settlement billable charge for a domestic provider. **Note:** The **Search** (🔍) icon appears corresponding to the **Domestic Provider Billable Charge Line Type** field. On clicking the **Search** (🔍) icon corresponding to the **Domestic Provider Billable Charge Line Type** field, the **Billable Charge Line Type Search** window appears. On specifying the billable charge line type, the description of the billable charge line type appears corresponding to the **Domestic Provider Billable Charge Line Type** field.	No
Markup or Markdown Billable Charge Line Type	Used to indicate the markup or markdown billable charge line type using which you want to create the billable charges for markup or markdown which are settled against the level-funded premium.	No

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The **Search** (🔍) icon appears corresponding to the **Markup or Markdown Billable Charge Line Type** field. On clicking the **Search** (🔍) icon corresponding to the **Markup or Markdown Billable Charge Line Type** field, the **Billable Charge Line Type Search** window appears. On specifying the billable charge line type, the description of the billable charge line type appears corresponding to the **Markup or Markdown Billable Charge Line Type** field.	
Markup or Markdown Eligibility Rule Type	Used to indicate the rules that should be executed to determine whether the markup or markdown calculation line is eligible for billing.	No
Rule Based Markup or Markdown Eligibility Field	Used to indicate the transaction field which you want to use in the rules as the output parameter to determine whether the markup or markdown calculation line is eligible for billing. **Note:** The **Search** (🔍) icon appears corresponding to the **Rule Based Markup or Markdown Eligibility Field** field. On clicking the **Search** (🔍) icon corresponding to the **Rule Based Markup or Markdown Eligibility Field Type** field, the **Field Search** window appears. On specifying the eligibility field, the description of the field appears corresponding to the **Rule Based Markup or Markdown Eligibility Field** field.	Yes (Conditional) **Note:** This field is required when you are specifying a markup or markdown eligibility rule type in a level funded pricing rule type.
Domestic Provider Eligibility Rule Type	Used to indicate the rules that should be executed to determine whether the level-funded premium is for a domestic provider.	No
Rule Based Domestic Provider Claim Eligibility Field	Used to indicate the transaction field which you want to use in the rules as the output parameter to determine whether the level-funded premium is for a domestic provider. **Note:** The **Search** (🔍) icon appears corresponding to the **Rule Based Domestic Provider Claim Eligibility Field** field. On clicking the **Search** (🔍) icon corresponding to the **Rule Based Domestic Provider Claim Eligibility Field** field, the **Field Search** window appears. On specifying the eligibility field, the description of the field appears corresponding to the **Rule Based Domestic Provider Claim Eligibility Field** field.	Yes (Conditional) **Note:** This field is required when you are specifying a domestic provider eligibility rule type in a level funded pricing rule type.

2. Enter the required details in the **Level Funded - Specific Additional Data** section.
3. Click **Save**.
   The level funded-specific data is added in the level funded pricing rule type.

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Related Topics

For more information on...	See...
How to define a level funded pricing rule type	Defining a Level Funded Pricing Rule Type on page 3248
How to edit a level funded pricing rule type	Editing a Level Funded Pricing Rule Type on page 3262

Editing a Level Funded Pricing Rule Type

Prerequisites

To edit a level funded pricing rule type, you should have:

- Level funded pricing rule type business object defined in the application.
- Level funded pricing rule business object defined in the application.

Procedure

To edit a level funded pricing rule type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **P** and then click **Pricing Rule Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Pricing Rule Type** sub-menu.
   The **Pricing Rule Type** screen appears.
4. In the **Pricing Rule Type List** zone, click the **Edit** (✎) icon in the **Edit** column corresponding *t*o the pricing rule type whose details you want to edit.

   The **Level Funded Pricing Rule Type** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details about the discount arrangement pricing rule type.
   - **Algorithms** - Used to associate the algorithms with a discount arrangement pricing rule type.
   - **Additional Data** - Used to specify the additional information about the discount arrangement pricing rule type.
   - **Price Items** - Used to add the price items for which you can define the discount arrangement pricing rules using the discount arrangement pricing rule type.
   - **Price Item Parameters** - Used to add the price item parameters based on which you want to define the price item pricing.
   - **Characteristics** - Used to define the characteristics for a discount arrangement pricing rule type.
   - **Level Funded - Specific Additional Data** - Used to define the discount arrangement - specific additional data in a discount arrangement pricing rule type.

   The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Pricing Rule Type	Displays the level funded pricing rule type.	Not applicable
Description	Used to specify the description for the level funded pricing rule type.	Yes
Detailed Description	Used to specify additional information about the level funded pricing rule type.	No
Pricing Rule Business Object	Used to indicate the business object using which you want to create the level funded pricing rule. The valid value is:	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	• Level Funded (LF) Pricing Rule	
Business Object	Indicates the business object used while defining the level funded pricing rule type.	Not applicable
Status	Used to indicate the status of the level funded pricing rule type. The valid values are: • Active • Inactive	Yes
Primary	Used to indicate whether the pricing rule type is primary. **Note:** You must not select the **Primary** option while defining the level funded pricing rule type.	Not applicable
Pricing Rule Type Category	Indicates the pricing rule type category for the level funded pricing rule type. The valid values are: • Level Funded	No

Tip: Alternatively, you can edit the details of a level funded pricing rule type by clicking the **Edit** button in the **Pricing Rule Type** zone.

5. Modify the details in the **Main** section.
6. Associate the following algorithms with the level funded pricing rule type:

System Event	Algorithm	Algorithm Type	Description
Account and Price Item Derivation	C1_ACCPRISL	C1_ACCPRIDIS	Account and Priceitem Derivation For Level Funded
Accumulation Post Processing	C1-LFACPOST	C1-LFACPOST	Level Funded Accumulation Post Processing

7. Modify the additional data for a level funded pricing rule type, if required.
8. Add, edit, or remove the required price items in the level funded pricing rule type.
9. Add, edit, or remove the price item parameters in the level funded pricing rule type, if required.
10. Add, edit, or remove characteristics for a level funded pricing rule type, if required.
11. Modify the level funded-specific additional data in the level funded pricing rule type, if required.
12. Click **Save**.
    The changes made to the level funded pricing rule type are saved.

Related Topics

For more information on...	See...
How to associate algorithms with the level funded pricing rule type	Associating an Algorithm with a Level Funded Pricing Rule Type on page 3250
How to define additional data for a level funded pricing rule type	Defining Additional Data in a Level Funded Pricing Rule Type on page 3251
How to add price items in the level funded pricing rule type	Adding a Price Item in a Level Funded Pricing Rule Type on page 3253

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For more information on...	See...
How to add price item parameters in the level funded pricing rule type	Adding a Price Item Parameter in a Level Funded Pricing Rule Type on page 3255
How to define a characteristic for a level funded pricing rule type	Defining a Characteristic for a Level Funded Pricing Rule Type on page 3257
How to define level funded-specific data in the level funded pricing rule type	Defining the Level Funded Specific Additional Data in a Level Funded Pricing Rule Type on page 3258

Deleting a Level Funded Pricing Rule Type

Procedure

To delete a level funded pricing rule type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **P** and then click **Pricing Rule Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Pricing Rule Type** sub-menu.
   The **Pricing Rule Type** screen appears.
4. In the **Pricing Rule Type List** zone, click the **Delete** (🗑) icon in the **Delete** column corresponding to the level funded pricing rule type that you want to delete.
   A message appears confirming whether you want to delete the level funded pricing rule type.

   Note: You can delete a level funded pricing rule type when it is not yet used in the system.

   Tip: Alternatively, you can delete a level funded pricing rule type by clicking the **Delete** button in the **Pricing Rule Type** zone.
5. Click **OK**.
   The level funded pricing rule type is deleted.

Related Topics

For more information on...	See...
Pricing Rule Type screen	Pricing Rule Type on page 2942
Pricing Rule Type List zone	Pricing Rule Type List on page 2943
Pricing Rule Type zone	Pricing Rule Type on page 2946

Viewing the Level Funded Pricing Rule Type Details

Procedure

To view the details of a level funded pricing rule type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **P** and then click **Pricing Rule Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Pricing Rule Type** sub-menu.

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The **Pricing Rule Type** screen appears.

4. In the **Pricing Rule Type List** zone, click the **Broadcast** (ᯤ) icon corresponding to the level funded pricing rule type whose details you want to view.
   The **Pricing Rule Type** zone appears.
5. View the details of the level funded pricing rule type in the **Pricing Rule Type** zone.

Related Topics

For more information on...	See...
Pricing Rule Type screen	Pricing Rule Type on page 2942
Pricing Rule Type List zone	Pricing Rule Type List on page 2943
Pricing Rule Type zone	Pricing Rule Type on page 2946

Defining a Level Funded Pricing Rule for a Parent Customer

Prerequisites

To define a level funded pricing rule for a parent customer, you should have:

- Pricing rule type where the category is set to **Level Funded**.
- Price items associated with the level funded pricing rule type.
- Specific stop-loss pricing rule of the parent customer, whose accumulation parameters you want to inherit for level funding.

Procedure

To define a level funded pricing rule for a parent customer:

1. Search for a parent customer in the **Customer 360° View** screen.
2. In the **Search Results** section, click the **View** (🔗) icon corresponding *t*o the parent customer whose pricing details you want to view.
   The **Person** tab appears in the **Customer 360° Information** screen.
3. Click the **Pricing** tab.
   The **Pricing** tab appears.
4. Click the **Add** link in the upper-right corner of the **Parent Customer Pricing Rules** zone.

   The **Pricing Rule** screen appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Person Name	Indicates the parent customer for whom you want to create a level funded pricing rule type.	Not applicable
Person Type	Indicates the type of the parent customer. The valid value is: • **Parent Customer**	Not applicable
Pricing Rule Type	Used to indicate the pricing rule type using which you want to create a level funded pricing rule.	Yes

5. Select the required pricing rule type in the respective field.
6. Click **OK**.

   The **Level Funded (LF) Pricing Rule** screen appears. It contains the following sections:

   - **Customer Information** - Displays the information about the parent customer for whom you are defining the level funded pricing rule. It contains the following fields:

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Field Name	Field Description
Parent Customer Information	Indicates the parent customer for whom you are defining the level funded pricing rule.
Pricing Rule Type	Indicates the pricing rule type using which you are defining the level funded pricing rule.

- **Main** - Used to specify basic details in the level funding pricing rule.
- **Accumulation Parameters** - Used to define the accumulation parameters in a level funded pricing rule.
- **Final Settlement Rules** - Used to define the final settlement rules when the customer decides to renew or cancel the level-funded agreement.
- **Characteristics** - Used to define the characteristics for the level funded pricing rule.

Note:

The **Accumulation Parameters** and **Final Settlement Rules** section appear when you specify a price item in the **Main** section.

The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Price Item	Used to indicate the price item for which you want to define the level funded pricing rule.	Yes
Parent Customer's Pricing Rule	Used to indicate the date range of each specific stop-loss pricing rule, defined for the parent customer. **Note:** On selecting the specific stop-loss pricing rule of the parent customer, the level funded **Pricing Start Date** and **Pricing End Date** field is set automatically.	Yes
Pricing Start Date	Used to specify the date from when the level funded pricing rule is effective. **Note:** The pricing start date cannot be later than the pricing end date.	Yes
Pricing End Date	Used to specify the date till when the level funded pricing rule is effective. **Note:** The pricing end date cannot be earlier than the pricing start date.	No
Rate Option	Used to indicate the rate option that you want to use while defining the pricing for the price item.	Yes
Settlement Frequency	Used to indicate the settlement frequency which helps to determine the bill after date. The valid values are: • **Immediately** - If you select this option from the list, the bill after date is not calculated. The level-funded settlement billable charge is billed immediately in the next bill cycle. • **Manually (At Regular Intervals)** - If you select this option from the list, the bill after date which is specified in the **Manual Settlement Bill After Date** parameter while	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	executing the **C1-BCLF** batch is stamped on the level-funded settlement billable charge. • **Monthly** - If you select this option from the list, the bill after date is set to the last day of the month. • **On Settlement** - If you select this option from the list, the bill after date is set to the settlement date in the level-funded settlement billable charge. • **Yearly** - If you select this option from the list, the bill after date in the credit billable charge is set to the pricing end date in the level-funded settlement billable charge.	
Underwriter Review	Used to indicate whether the underwriter settlement review flag is on or off. The valid values are: • Yes • No **Note:** By default the value of this option type is set to **Yes**.	No

7. Enter the required details in the **Main** section.
8. Define the accumulation parameters in the level funded pricing rule.
9. Define the final settlement rules in the level funded pricing rule.
10. Define characteristics for the level funded pricing rule, if required.
11. Click **Save**.
    The level funded pricing rule is defined for the parent customer.

Related Topics

For more information on...	See...
How to search for a parent customer	Searching for a Person on page 597
Parent Customer Pricing Rules zone	Parent Customer Pricing Rules on page 643
How to define the accumulation parameters in a level funded pricing rule	Defining Accumulation Parameters in a Level Funded Pricing Rule on page 3271
How to define the final settlement rules in a level funded pricing rule	Defining the Final Settlement Rules in a Level Funded Pricing Rule on page 3272
How to define the characteristics for a level funded pricing rule	Defining a Characteristic for a Level Funded Pricing Rule on page 3276

Editing a Level Funded Pricing Rule of a Parent Customer

Procedure

To edit a discount arrangement pricing rule of a parent customer:

1. Search for a parent customer in the **Customer 360° View** screen.
2. In the **Search Results** section, click the **View** (🔗) icon corresponding to the parent customer whose pricing details you want to view.
   The **Person** tab appears in the **Customer 360° Information** screen.
3. Click the **Pricing** tab.

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The **Pricing** tab appears.

4. In the **Parent Customer Pricing Rules** zone, click the **Edit** (✎) icon in the **Edit** column corresponding to the level funded pricing rule, whose details you want to edit.

   The **Level Funded (LF) Pricing Rule** screen appears. It contains the following sections:

   - **Customer Information** - Displays information about the parent customer for whom the discount arrangement pricing rule is defined. It contains the following fields:

Field Name	Field Description
Parent Customer Information	Indicates the parent customer for whom the level funded pricing rule is defined.
Pricing Rule Type	Indicates the level funded pricing rule type using which the level funded pricing rule is defined.

   - **Main** - Used to specify basic details in the level funded pricing rule.
   - **Accumulation Parameters** - Used to define the accumulation parameters in a level funded pricing rule.
   - **Final Settlement Rules** - Used to define the final settlement rules when the customer decides to renew or cancel the level funded agreement.
   - **Characteristics** - Used to define the characteristics for the level funded pricing rule.

   Note: The **Accumulation Parameters** and **Final Settlement Rules** section appear when you specify a price item in the **Main** section.

   The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Price Item	Used to indicate the price item for which you want to define the level funded pricing rule.	Yes
Parent Customer's Pricing Rule	Used to indicate the date range of each specific stop-loss pricing rule which is defined for the parent customer. **Note:** On selecting the specific stop-loss pricing rule of the parent customer, the level funded **Pricing Start Date** and **Pricing End Date** field is set automatically.	Yes
Pricing Start Date	Used to specify the date from when the level funded pricing rule is effective. **Note:** The pricing start date cannot be later than the pricing end date.	Yes
Pricing End Date	Used to specify the date till when the level funded pricing rule is effective. **Note:** The pricing end date cannot be earlier than the pricing start date.	No
Rate Option	Used to indicate the rate option that you want to use while defining the pricing for the price item.	Yes
Settlement Frequency	Used to indicate the settlement frequency which helps to determine the bill after date. The valid values are:	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	• **Immediately** - If you select this option from the list, the bill after date is not calculated. The level-funded settlement billable charge is billed immediately in the next bill cycle. • **Manually (At Regular Intervals)** - If you select this option from the list, the bill after date which is specified in the **Manual Settlement Bill After Date** parameter while executing the **C1-BCLF** batch is stamped on the level-funded settlement billable charge. • **Monthly** - If you select this option from the list, the bill after date is set to the last day of the month. • **On Settlement** - If you select this option from the list, the bill after date is set to the settlement date in the level-funded settlement billable charge. • **Yearly** - If you select this option from the list, the bill after date in the credit billable charge is set to the pricing end date in the level-funded settlement billable charge.	
Underwriter Review	Used to indicate whether the underwriter settlement review flag is on or off. The valid values are: • Yes • No **Note:** By default the value of this option type is set to **Yes**.	No

5. Modify the required details in the **Main** section.
6. Modify the required accumulation parameters in the level funded pricing rule.
7. Modify the final settlement rules in the level funded pricing rule.
8. Define, edit, or remove characteristics of the level funded pricing rule, if required.
9. Click **Save**.
   The changes made to the level funded pricing rule are saved.

Related Topics

For more information on...	See...
How to search for a parent customer	Searching for a Person on page 597
Parent Customer Pricing Rules zone	Parent Customer Pricing Rules on page 643
How to define the accumulation parameters in a level funded pricing rule	Defining Accumulation Parameters in a Level Funded Pricing Rule on page 3271
How to define the final settlement rules in a level funded pricing rule	Defining the Final Settlement Rules in a Level Funded Pricing Rule on page 3272
How to define the characteristics for a level funded pricing rule	Defining a Characteristic for a Level Funded Pricing Rule on page 3276

Deleting a Level Funded Pricing Rule of a Parent Customer

Procedure

To delete a level funded pricing rule of a parent customer:

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1. Search for a parent customer in the **Customer 360° View** screen.
2. In the **Search Results** section, click the **View** (🔗) icon corresponding to the parent customer whose pricing details you want to view.
   The **Person** tab appears in the **Customer 360° Information** screen.
3. Click the **Pricing** tab.
   The **Pricing** tab appears.
4. In the **Parent Customer Pricing Rules** zone, click the **Delete** (🗑) icon in the **Delete** column corresponding to the level funded pricing rule that you want to delete.
   A message appears confirming whether you want to delete the level funded pricing rule.

   Note: You can delete a level funded pricing rule when it is not yet used in the system.
5. Click **OK**.
   The level funded pricing rule of a parent customer is deleted.

Related Topics

For more information on...	See...
How to search for a parent customer	Searching for a Person on page 597
Parent Customer Pricing Rules zone	Parent Customer Pricing Rules on page 643

Viewing the Details of a Level Funded Pricing Rule Defined for a Policy of a Parent Customer

Procedure

To view the level funded pricing rule details of a parent customer:

1. Search for a parent customer whose pricing details you want to view in the **Customer 360° View** screen.
2. In the **Search Results** section, click the **View** (🔗) icon corresponding to the parent customer whose pricing details you want to view.
   The **Person** tab appears in the **Customer 360° Information** screen.
3. Click the **Pricing** tab.
   The **Pricing** tab appears.
4. In the **Parent Customer Pricing Rules** zone, click the link in the **Pricing Rule Information** column corresponding to the pricing rule type whose details you want to view.
   The **Pricing Rule** screen appears. It contains the following zone:
   - **Level Funding** - Displays the level funded pricing rule of a parent customer. It contains the following sections:
     - **Main** - Displays basic details of the level funded pricing rule.
     - **Accumulation Parameters** - Displays the accumulation parameters defined for a parent customer in the level funded pricing rule.
     - **Final Settlement Rules** - Displays the final settlement rules defined for the level funded pricing rule.
     - **Characteristics** - Displays the characteristics defined for the level funded pricing rule.
5. View the basic details of the level funded pricing rule in the **Main** section.
6. View the accumulation parameters defined for a parent customer in the **Accumulation Parameters** section.
7. View the final settlement rules defined for the level funded pricing rule in the **Final Settlement Rules** section.
8. View the characteristics of the level funded pricing rule in the **Characteristics** section.

Related Topics

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For more information on...	See...
Customer 360° Information - Pricing tab	Customer 360° Information - Pricing Information on page 641
Parent Customer Pricing Rules zone	Parent Customer Pricing Rules on page 643
Pricing Rule screen	Pricing Rule (Used for Viewing) on page 689
Level Funded zone	Level Funded on page 712

Defining Accumulation Parameters in a Level Funded Pricing Rule

Procedure

To define accumulation parameters in a level funding pricing rule:

1. Ensure that the **Accumulation Parameters** section is expanded when you have selected an option from the **Price Item** field of the **Main** section while defining a level funded pricing rule.

   The **Accumulation Parameters** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Accumulation Group ID	Displays a blank field. An accumulation group ID is generated when accumulation parameter values are defined for a level funded pricing rule. **Note:** It is a read-only field.	Not applicable
Settlement Account ID	Used to indicate the account ID to whom the settlement amount is credited.	Yes
Incurred Start Date	Displays the incurred start date (inherited from parent customer's specific stop-loss pricing rule) based on which you want to accumulate the level funded pricing. **Note:** It is a read-only field.	Not applicable
Incurred End Date	Displays the incurred end date (inherited from parent customer's specific stop-loss pricing rule) based on which you want to accumulate the level funded pricing. **Note:** It is a read-only field.	Not applicable
Paid Start Date	Displays the paid start date (inherited from parent customer's specific stop-loss pricing rule) based on which you want to accumulate the level funded pricing. **Note:** It is a read-only field.	Not applicable
Paid End Date	Displays the paid end date (inherited from parent customer's specific stop-loss pricing rule) based on which you want to accumulate the level funded pricing. **Note:** It is a read-only field.	Not applicable
Settlement Days	Used to indicate the number of days as the settlement days which help in calculating the settlement date. The valid values are:	Not applicable

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Field Name	Field Description	Mandatory (Yes or No)
	• 30 Days • 60 Days • 90 Days • 120 Days • 150 Days • 180 Days	
	Note: Settlement date is calculated as the pricing end date, incurred end date, or paid end date whichever is later plus the settlement days.	

2. Enter the required details in the **Accumulation Parameters** section.
3. Click **Save**.
   The accumulation parameters are defined in the level funded pricing rule.

Related Topics

For more information on...	See...
How to define a level funded pricing rule for a parent customer	Defining a Level Funded Pricing Rule for a Parent Customer on page 3265
How to edit a level funded pricing rule of a parent customer	Editing a Level Funded Pricing Rule of a Parent Customer on page 3267

Defining the Final Settlement Rules in a Level Funded Pricing Rule

Procedure

To define the final settlement rules in a level funded pricing rule:

1. Ensure that the **Final Settlement Rules** section is expanded when you are defining or editing a level funded pricing rule type.

   The **Final Settlement Rules** section contains the following sub-sections:

   - **Customer Renews** - Used to define the final settlement rules when the customer renews the contract.
   - **Customer Cancels** - Used to define the final settlement rules when the customer cancels the contract.
   - **Renewal Decision** - Used to indicate the status for the upcoming level funded contract.

   The **Customer Renews** sub-section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Final Settlement Mode	Displays the final settlement mode when the customer renews the level funded agreement. The valid values are: • Final Settlement Surplus • Final Settlement Deficit	Not applicable
Final Settlement Option	Used to indicate the final settlement option when the customer renews the level funded agreement.	Not applicable

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<table>
<tr><th>Field Name</th><th>Field Description</th><th>Mandatory (Yes or No)</th></tr>
<tr><td></td><td>
<table>
<tr><th>Field Name</th><th>Field Description</th><th>Mandatory (Yes or No)</th></tr>
<tr><td>Final Settlement Surplus</td><td>Used to indicate the final settlement option in case of surplus.</td><td>Yes</td></tr>
<tr><td>Final Settlement Deficit</td><td>Used to indicate the final settlement option in case of deficit.</td><td>Yes</td></tr>
</table>
</td><td></td></tr>
<tr><td>Flat/Percentage</td><td>Used to indicate the final settlement payment type when the customer renews the level funded agreement.
<table>
<tr><th>Field Name</th><th>Field Description</th><th>Mandatory (Yes or No)</th></tr>
<tr><td>Final Settlement Surplus</td><td>Used to indicate the payment type in case of surplus. The valid values are:
Flat Dollar
Percentage</td><td>Yes</td></tr>
<tr><td>Final Settlement Deficit</td><td>Used to indicate the payment type in case of deficit. The valid values are:
Flat Dollar
Percentage</td><td>Yes</td></tr>
</table>
</td><td>Not applicable</td></tr>
<tr><td>Percentage Retained</td><td>Used to specify the percentage retained by the ASO provider when the customer renews the level funded agreement.
<table>
<tr><th>Field Name</th><th>Field Description</th><th>Mandatory (Yes or No)</th></tr>
<tr><td>Final Settlement Surplus</td><td>Used to specify the percentage of surplus that should be retained by the ASO provider.
Note: This field appears when the Flat/Percentage field is Percentage.</td><td>Yes (Conditional)</td></tr>
<tr><td>Final Settlement Deficit</td><td>Used to specify the percentage of deficit that should be offered as a discount by the ASO provider.
Note: This field appears when the Flat/Percentage field is Percentage.</td><td>Yes (Conditional)</td></tr>
</table>
</td><td>Not applicable</td></tr>
</table>

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<table>
<tr><th>Field Name</th><th>Field Description</th><th>Mandatory (Yes or No)</th></tr>
<tr><td>Flat Effective Payout</td><td>Used to specify the actual amount which should be retained by the ASO provider or offered as a discount, when the customer renews the level funded agreement.
<table>
<tr><th>Field Name</th><th>Field Description</th><th>Mandatory (Yes or No)</th></tr>
<tr><td>Final Settlement Surplus</td><td>Used to specify the actual amount of surplus that should be retained by the ASO provider.

Note: This field appears when the Flat/Percentage field is Flat Dollar.</td><td>Yes (Conditional)</td></tr>
<tr><td>Final Settlement Deficit</td><td>Used to specify the actual amount of deficit that should be offered as a discount by the ASO provider.

Note: This field appears when the Flat/Percentage field is Flat Dollar.</td><td>Yes (Conditional)</td></tr>
</table></td><td>Not applicable</td></tr>
</table>

The **Customer Cancels** sub-section contains the following fields:

<table>
<tr><th>Field Name</th><th>Field Description</th><th>Mandatory (Yes or No)</th></tr>
<tr><td>Final Settlement Mode</td><td>Displays final settlement mode when the customer cancels the level funded agreement. The valid values are:
• Final Settlement Surplus
• Final Settlement Deficit</td><td>Not applicable</td></tr>
<tr><td>Final Settlement Option</td><td>Used to indicate the final settlement option when the customer cancels the level funded agreement.
<table>
<tr><th>Field Name</th><th>Field Description</th><th>Mandatory (Yes or No)</th></tr>
<tr><td>Final Settlement Surplus</td><td>Used to indicate the final settlement option in case of surplus.</td><td>Yes</td></tr>
<tr><td>Final Settlement Deficit</td><td>Used to indicate the final settlement option in case of deficit.</td><td>Yes</td></tr>
</table></td><td>Not applicable</td></tr>
<tr><td>Flat/Percentage</td><td>Used to indicate the final settlement payment type when the customer cancels the level funded agreement.</td><td>Not applicable</td></tr>
</table>

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<table>
<tr><th>Field Name</th><th>Field Description</th><th>Mandatory (Yes or No)</th></tr>
<tr><td></td><td>
<table>
<tr><th>Field Name</th><th>Field Description</th><th>Mandatory (Yes or No)</th></tr>
<tr><td>Final Settlement Surplus</td><td>Used to indicate the payment type in case of surplus. The valid values are:
Flat Dollar
Percentage</td><td>Yes</td></tr>
<tr><td>Final Settlement Deficit</td><td>Used to indicate the payment type in case of deficit. The valid values are:
Flat Dollar
Percentage</td><td>Yes</td></tr>
</table>
</td><td></td></tr>
<tr><td>Percentage Retained</td><td>Used to specify the percentage retained by the ASO provider when the customer cancels the level funded agreement.
<table>
<tr><th>Field Name</th><th>Field Description</th><th>Mandatory (Yes or No)</th></tr>
<tr><td>Final Settlement Surplus</td><td>Used to specify the percentage of surplus that should be retained by the ASO provider.
Note: This field appears when the Flat/Percentage field is Percentage.</td><td>Yes</td></tr>
<tr><td>Final Settlement Deficit</td><td>Used to specify the percentage of deficit that should be offered as a discount by the ASO provider.
Note: This field appears when the Flat/Percentage field is Percentage.</td><td>Yes</td></tr>
</table>
</td><td>Not applicable</td></tr>
<tr><td>Flat Effective Payout</td><td>Used to specify the actual amount which should be retained by the ASO provider or offered as a discount, when the customer cancels the level funded agreement.
<table>
<tr><th>Field Name</th><th>Field Description</th><th>Mandatory (Yes or No)</th></tr>
<tr><td>Final Settlement Surplus</td><td>Used to specify the actual amount of surplus that should be retained by the ASO provider.
Note: This field appears when the Flat/Percentage field is Flat Dollar.</td><td>Yes</td></tr>
</table>
</td><td>Not applicable</td></tr>
</table>

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Field Name	Field Description			Mandatory (Yes or No)
	Field Name	**Field Description**	**Mandatory (Yes or No)**	
	Final Settlement Deficit	Used to specify the actual amount of deficit that should be offered as a discount by the ASO provider. **Note:** This field appears when the **Flat/Percentage** field is **Flat Dollar**.	Yes	

The **Renewal Decision** sub-section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Renewal Decision	Used to indicate the upcoming status of the level funded contract. The valid values are: • Cancelled • Renewed **Note:** This field appears when the level funded current contract date is exceeded.	No

2. Enter the required details in the **Final Settlement Rules** section.
3. Click **Save**.
   The final settlement rules are added in the level funded pricing rule.

Related Topics

For more information on...	See...
How to define a level funded pricing rule for a parent customer	Defining a Level Funded Pricing Rule for a Parent Customer on page 3265
How to edit a level funded pricing rule of a parent customer	Editing a Level Funded Pricing Rule of a Parent Customer on page 3267

Defining a Characteristic for a Level Funded Pricing Rule

Prerequisites

To define a characteristic for a level funded pricing rule, you should have:

- Characteristic types defined in the application (where the characteristic entity is set to **Pricing Rule**).

Procedure

To define a characteristic for a level funded pricing rule:

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1. Ensure that the **Characteristics** section is expanded when you are defining or editing a *l*evel funded pricing rule.

   The **Characteristics** section contains the following fields in the grid:

Column Name	Column Description	Mandatory (Yes or No)
Effective Date	Used to specify the date from when the characteristic is effective for a level funded pricing rule.	Yes (Conditional) **Note:** This field is required when you are defining a characteristic for a level funded pricing rule.
Characteristic Type	Used to indicate the characteristic type. **Note:** The list includes only those characteristic types where the characteristic entity is set to **Pricing Rule**.	Yes (Conditional) **Note:** This field is required when you are defining a characteristic for a level funded pricing rule.
Characteristic Value	Used to specify the value for the characteristic type. **Note:** If you select a predefined characteristic type, the **Search** (🔍) icon appears corresponding to the **Characteristic Value** field. On clicking the **Search** icon, the **Predefined Characteristic Search** window appears. On specifying the value for a predefined characteristic type, the description of the characteristic value appears corresponding to the **Characteristic Value** field.	Yes (Conditional) **Note:** This field is required when you are defining a characteristic for a level funded pricing rule.

2. Enter the required details in the **Characteristics** section.
3. If you want to define more than one characteristic for the level funded pricing rule, click the **Add** (+) icon and then repeat step 2.

   Note: However, if you want to remove a characteristic from the level funded pricing rule, click the **Delete** (🗑) icon corresponding to the characteristic.

4. Click **Save**.
   The characteristics are defined for the level funded pricing rule.

Related Topics

For more information on...	See...
How to define a level funded pricing rule for a parent customer	Defining a Level Funded Pricing Rule for a Parent Customer on page 3265
How to edit a level funded pricing rule of a parent customer	Editing a Level Funded Pricing Rule of a Parent Customer on page 3267
How to define a level funded pricing rule for a bill group	Defining a Level Funded Pricing Rule for a Bill Group on page 3278
How to edit a level funded pricing rule for a bill group	Editing a Level Funded Pricing Rule of a Bill Group on page 3280

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Defining a Level Funded Pricing Rule for a Bill Group

Prerequisites

To define a level funded pricing rule for a bill group, you should have:

- Pricing rule type where the category is set to **Level Funded**.
- Price items associated with the level funded pricing rule type.
- Specific stop-loss pricing rule of the parent customer, whose accumulation parameters you want to inherit for level funding.
- Policy status defined in the application.

Procedure

To define a level funded pricing rule for a bill group:

1. Search for the Administrative Services Only (ASO) person, whose person type is set to **Bill Group**, in the **Customer 360° View** screen.
2. In the **Search Results** section, click the **View** (🔗) icon corresponding to the person *w*hose pricing details you want to view.
   The **Person** tab appears in the **Customer 360° Information** screen.
3. Click the **Pricing** tab.
   The **Pricing** tab appears.
4. Click the **Broadcast** (📡) icon in the **Bill Group ASO Policy Information** zone, corresponding to the **Bill Group Information** column, whose bill group details *y*ou want to view.
   The **Bill Group ASO Policy Pricing Rules** zone is displayed.
5. Click the **Add** link in the upper right corner of the **Bill Group ASO Policy Pricing Rules** zone.

   The **Pricing Rule** screen appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Person Name	Indicates the name of the parent customer.	Not applicable
Person Type	Indicates the type of the parent customer. **Note:** If you are defining the pricing rule type for the parent customer, then the person type will be **Parent Customer**.	Not applicable
Pricing Rule Type	Used to indicate the pricing rule type using which you want to create a level funded pricing rule. **Note:** Select the **Level Funded Pricing Rule Type** option, as the pricing rule.	Yes **Note:** If the pricing rule type is not selected then the application displays an error message.
Pricing Group	Used to indicate the pricing group which is used while defining the pricing.	No
Policy Status	Used to indicate the policy status for the pricing rule. The valid values are: • In Force/Active • Runout	Yes (Conditional) **Note:** Policy Status is required once the Pricing Rule Type is selected.

6. Click **OK**.

   The **Level Funded (LF) Pricing Rule** screen appears. It contains the following sections:

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- **Customer Information** - Displays the information about the bill group. It contains the following columns:

Column Name	Column Description
Bill Group Information	Displays the bill group information.
Policy Start Date	Displays the date from when the policy is effective.
Policy End Date	Displays the date till when the policy is effective.
Policy Status	Indicates the policy status for the pricing rule.
Pricing Rule Type	Indicates the pricing rule type for whom the level funded pricing rule is created.

- **Main** - Used to specify basic details in the level funding pricing rule.
- **Accumulation Criteria** - Used to define the accumulation criteria in a level funded pricing rule.
- **Pricing Information for rule type category : Claim** - Used to define the line items in a particular claim pricing rule or those which are associated with the level funded rule type category.
- **Pricing Information for rule type category : Ancillary** - Used to define the line items in a particular ancillary pricing rule or those which are associated with the level funded rule type category.
- **Pricing Information for rule type category : Discount** - Used to define the discount arrangement pricing rule which is effective for level funding calculations.
- **Pricing Information for rule type category : Retention** - Used to define the retention pricing rule which is effective for level funding calculations.
- **Characteristics** - Used to define the characteristics for the level funded pricing rule.

Note:

The **Accumulation Criteria**, **Pricing Information for rule type category: Claim**, **Pricing Information for rule type category: Ancillary**, **Pricing Information for rule type category: Discount**, and **Pricing Information for rule type category: Retention** section appear when you specify a price item in the **Main** section.

The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Price Item	Used to indicate the price item for which you want to define the level funded pricing rule.	Yes
Parent Customer's Pricing Rule	Used to indicate the date range of each specific stop-loss pricing rule, defined for the parent customer. **Note:** On selecting the specific stop-loss pricing rule of the parent customer, the level funded **Pricing Start Date** and **Pricing End Date** field is set automatically.	Yes
Pricing Start Date	Used to specify the date from when the level funded pricing rule is effective. **Note:** The pricing start date cannot be later than the pricing end date.	Not applicable
Pricing End Date	Used to specify the date till when the level funded pricing rule is effective.	Not applicable

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The pricing end date cannot be earlier than the pricing start date.	
Rate Option	Used to indicate the rate option that you want to use while defining the pricing for the price item.	Yes
Settlement Fund Price Item	Used to indicate the price item derived from the level funded pricing rule type, used to create the level funded pricing rule type.	Not applicable

7. Enter the required details in the **Main** section.
8. Define the accumulation criteria in the level funded pricing rule for a bill group.
9. Define the pricing information for the claim rule type category for a bill group.
10. Define the pricing information for the ancillary rule type category for a bill group, if required.
11. Define the pricing information for the discount rule type category for a bill group, if required.
12. Define the pricing information for the retention rule type category for a bill group, if required.
13. Define characteristics for the level funded pricing rule for a bill group, if required, if required.
14. Click **Save**.
    The level funded pricing rule is defined for a bill group.

Related Topics

For more information on...	See...
How to search for a parent customer	Searching for a Person on page 597
Parent Customer Pricing Rules zone	Parent Customer Pricing Rules on page 643
How to define accumulation criteria in a level funded rule for a bill group	Defining Accumulation Criteria in a Level Funded Pricing Rule on page 3282
How to define claim pricing information in a level funded pricing rule	Defining Claim Pricing Information in a Level Funded Pricing Rule on page 3284
How to define ancillary pricing information in a level funded pricing rule	Defining Ancillary Pricing Information in a Level Funded Pricing Rule on page 3288
How to define discount pricing information in a level funded pricing rule	Defining Discount Arrangement Pricing Information in a Level Funded Pricing Rule on page 3291
How to define retention type claim based and/or retention type enrollment based pricing information in a level funded pricing rule	Defining Retention Type Claim Based and/or Retention Type Enrollment Based Pricing Rule Information in a Level Funded Pricing Rule on page 3292
How to define a characteristic for the level funded pricing rule for a bill group	Defining a Characteristic for a Level Funded Pricing Rule on page 3276

Editing a Level Funded Pricing Rule of a Bill Group

Prerequisites

To edit a level funded pricing rule of a bill group, you should have:

- Business Object **C1-PricingRuleLevelFunded** defined for the level funded pricing rule.

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Procedure

To edit a a level funded pricing rule of a bill group:

1. Search for a parent customer in the **Customer 360° View** screen.
2. In the **Search Results** section, click the **View** (🔗) icon corresponding to the parent customer whose pricing details you want to view.
   The **Person** tab appears in the **Customer 360° Information** screen.
3. Click the **Pricing** tab.
   The **Pricing** tab appears. It consists of the following zones:
   - **Parent Customer Pricing Rule Summary**
   - **Bill Group ASO Policy Information**
   - **Bill Group ASO Policy Pricing Rules**
   - **Bill Group Pricing Groups**
   - **Pricing Rule Approval Transactions**
4. Click the Broadcast (📡) icon in the **Bill Group ASO Policy Information** zone, corresponding to the **Bill Group Information** column, whose details you want to view.
   The **Bill Group ASO Policy Pricing Rules** zone appears.
5. Click the **Edit** (✎) icon in the **Bill Group ASO Policy Pricing Rules** zone, corresponding to the **Pricing Rule Type** column, whose details you want to edit.
   The **Level Funded (LF) Pricing Rule** screen appears. It contains the following sections:
   - **Customer Information** - Displays the customer information for the bill group.
   - **Main** - Used to specify basic details about the level funded pricing rule.
   - **Accumulation Criteria** - Used to define the accumulation criteria in a level funded pricing rule.
   - **Pricing Information for rule type category : Claim** - Used to define the line items in a particular claim pricing rule or those which are associated with the level funded rule type category.
   - **Pricing Information for rule type category : Ancillary** - Used to define the line items in a particular ancillary pricing rule or those which are associated with the level funded rule type category.
   - **Pricing Information for rule type category : Discount** - Used to define the discount arrangement pricing rule which is effective for level funding calculations.
   - **Pricing Information for rule type category : Retention** - Used to define the retention pricing rule which is effective for level funding calculations.
   - **Characteristics** - Used to define the characteristics for the level funded pricing rule.

   The **Customer Information** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Bill Group Information	Displays the bill group information of the level funded pricing rule.	Not applicable
Policy Start Date	Displays the policy start date.	Not applicable
Policy End Date	Displays the policy end date.	Not applicable
Policy Status	Indicates the policy status for the level funded pricing rule. The valid values are: • In Force/Active • Post Runout • Runout	Not applicable
Pricing Rule Type	Indicates the pricing rule type for the level funded pricing rule.	Not applicable

   The **Main** section contains the following fields:

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Field Name	Field Description	Mandatory (Yes or No)
Price Item	Indicates the price item.	Not applicable
Parent Customer's Pricing Rule	Indicates the pricing rule of the parent customer.	Not applicable
Pricing Start Date	Indicates the pricing rule start date.	Not applicable
Pricing End Date	Indicates the pricing rule end date.	Not applicable
Rate Option	Indicates the rate option to edit the level funded pricing rule for the price item.	Not applicable
Settlement Fund Item	Indicates the price item derived from the level funded pricing rule type, used to create the level funded pricing rule type.	Not applicable

6. Modify the details in the **Main** section.
7. Modify the accumulation criteria in a level funded pricing rule for a bill group.
8. Modify the pricing information for the claim rule type category for a bill group.
9. Modify the pricing information for the ancillary rule type category for a bill group, if required.
10. Modify the pricing information for the discount rule type category for a bill group, if required.
11. Modify the pricing information for the retention rule type category for a bill group, if required.
12. Add, edit, or remove characteristics for the characteristics for a level funded pricing rule, if required.
13. Click **Save**.
    The changes made to a level funded pricing rule for a bill group are saved.

Related Topics

For more information on...	See...
Customer 360° Information - Pricing tab	Customer 360° Information - Pricing Information on page 641
Bill Group ASO Policy Pricing Rules zone	Bill Group Self-Funded Policy Pricing Rules on page 649
How to define markup or markdown values for line items in a claim pricing rule	Defining the Markup or Markdown Values For Line Items in a Claim Pricing Rule on page 2987
How to define a characteristic for a claim pricing rule	Defining a Characteristic for a Claim Pricing Rule on page 2992

Defining Accumulation Criteria in a Level Funded Pricing Rule

Procedure

To define accumulation criteria in a level funding pricing rule:

1. Ensure that the **Accumulation Criteria** section is expanded when you have selected an option from the **Price Item** field of the **Main** section while defining a level funded pricing rule.

   The **Accumulation Criteria** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Accumulation Group ID	Displays a blank field. An accumulation group ID is generated when accumulation parameter values are defined for a level funded pricing rule.	Not applicable

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<table>
<tr><th>Field Name</th><th>Field Description</th><th>Mandatory (Yes or No)</th></tr>
<tr><td></td><td>Note: It is a read-only field.</td><td></td></tr>
<tr><td>Price Items</td><td>Used to indicate the price item that you want to include in the accumulation criteria for a bill group.
<table>
<tr><th>Field Name</th><th>Field Description</th><th>Mandatory (Yes or No)</th></tr>
<tr><td>Price Item</td><td>Used to indicate the price item which is eligible for level funding.
Note:
The Search (🔍) icon appears corresponding to the Price Item field. On clicking the Search icon, the Price Item Search window appears.
On specifying the price item, the description of the price item appears corresponding to the Price Item field.</td><td>Not applicable</td></tr>
</table>
Note:
If you want to add more than one price item in a level funded pricing rule, click the Add (+) icon.
However, if you want to remove a price item from a level funded pricing rule, click the Delete (🗑) icon corresponding to the price item.</td><td>Not applicable</td></tr>
<tr><td>Price Item Parameters</td><td>Used to indicate the price item parameters that you want to include in the accumulation criteria for a bill group.
<table>
<tr><th>Field Name</th><th>Field Description</th><th>Mandatory (Yes or No)</th></tr>
<tr><td>Price Item Parameter</td><td>Used to indicate the price item parameter which is eligible for level funding.
Note:
The Search (🔍) icon appears corresponding to the Price Item Parameter field. On clicking the Search icon, the Price Item Parameter Search window appears.
On specifying the price item parameter, the description of the price item parameter appears corresponding to the Parameter Value field.</td><td>Not applicable</td></tr>
</table></td><td>Not applicable</td></tr>
</table>

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<table>
<tr><th>Field Name</th><th>Field Description</th><th>Mandatory (Yes or No)</th></tr>
<tr><td></td><td>
<table>
<tr><th>Field Name</th><th>Field Description</th><th>Mandatory (Yes or No)</th></tr>
<tr><td>Parameter Value</td><td>Used to indicate the parameter values which is eligible for level funding.</td><td>Not applicable</td></tr>
</table>
Note:
If you want to add more than one price item parameter in the accumulation criteria, click the Add (+) icon.
However, if you want to remove a price item parameter from the accumulation criteria, click the Delete (🗑) icon corresponding to the price item parameter.
</td><td></td></tr>
</table>

2. Enter the required details in the **Accumulation Criteria** section.
3. Click **Save**.
   The accumulation criteria is defined in the level funded pricing rule.

Related Topics

For more information on...	See...
How to define a level funded pricing rule for a bill group	Defining a Level Funded Pricing Rule for a Bill Group on page 3278
How to edit a level funded pricing rule of a parent customer	Editing a Level Funded Pricing Rule of a Parent Customer on page 3267

Defining Claim Pricing Information in a Level Funded Pricing Rule

Procedure

To define the claim pricing information in the level funded pricing rule:

1. Ensure that the **Pricing Information for rule type category : Claim** zone is expanded when you have selected an option from the **Price Item** field of the **Main** section while defining or editing a level funded pricing rule for a bill group.

   The **Pricing Information for rule type category : Claim** zone contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Pricing Rule Type	Used to indicate the claim pricing rule type effective for level funded pricing.	Yes
Derive Using	Used to indicate the method through which the claim pricing rule information is derived. The valid values are: • LF Line Items • Pricing Rules	Yes

   If **LF Line Items** option is selected from the **Derive Using** field, the following sub-sections appear:

   - **Domestic Provider Claims** - Used to specify the domestic provider claims while calculating the level funding line items.

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- **Markup or Markdown Values** - Used to define the markup or markdown values for level funding line items.
- **Line Items** - Used to associate the line items which are eligible for billing.

The **Domestic Provider Claims** section contains the following field:

Field Name	Field Description	Mandatory (Yes or No)
Exclude LF (Percentage)	Used to specify the billable charge line excluding the level funding charge in the percentage to create the domestic provider claim calculation lines.	No

The **Markup or Markdown Values** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Pricing Strategy	Used to indicate the pricing strategy for the claim line items. The valid values are: • Markdown • Markup • None	Not applicable
Markup or Markdown Type	Used to indicate the markup or markdown value type for the claim line items. The valid values are: • Flat Amount • Percentage	Not applicable
Markup or Markdown Amount	Used to specify the markup or markdown amount for the claim line items. **Note:** This field displays amount when **Markup or Markdown Type** field is set as **Flat Amount**.	Not applicable
Markup / Markdown Included in Settlement?	Used to specify whether markup or markdown amount should be included in the level funding settlement. The valid values are: • Yes • No **Note:** This field is required when **Flat Amount** option is selected from the **Markup or Markdown Type** field.	Yes (Conditional) **Note:** This field is required when **Flat Amount** option is selected from the **Markup or Markdown Type** field.

The **Line Items** section contains the following field:

Field Name	Field Description	Mandatory (Yes or No)
Line Item	Used to indicate the line item which is eligible for level funded pricing.	No

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The **Search** (🔍) icon appears corresponding to the **Line Item** field. On clicking the **Search** (🔍) icon corresponding to the **Line Item** field, the **Pricing Rule Line Item Search** window appears. On specifying the pricing rule line item, the description of the pricing rule line item appears corresponding to the **Line Item** field.	

If **Pricing Rule Type** option is selected from the **Derive Using** field, following sub-sections appear:

- **Claim Pricing Rule** - Used to indicate the claim pricing rule. It contains the following sub-sections:
  - **Domestic Provider Claims** - Used to specify the domestic provider claims while calculating the level funded pricing.
  - **Markup or Markdown Values** - Used to define the markup or markdown values for the billable charge line items.
  - **Line Items** - Used to associate the line items which are eligible for billing.

The **Claim Pricing Rule** section contains the following field:

Field Name	Field Description	Mandatory (Yes or No)
Effective Claim Pricing Rule	Used to indicate the claim pricing rule effective for level funded pricing.	No

Note: If you are editing a bill group's level funded pricing rule for the **Claim** rule type category (where the bill group's pricing has ended), a**Reapply** button appears corresponding to the **Effective Claim Pricing Rule** field. You can select an effective claim pricing rule and click the **Reapply** button to set a new pricing for the claim rule type that is eligible for level funding.

The **Domestic Provider Claims** section contains the following field:

Field Name	Field Description	Mandatory (Yes or No)
Exclude LF (Percentage)	Used to specify the billable charge line excluding the level funding charge in the percentage to create the domestic provider claim calculation lines.	No

The **Markup or Markdown Values** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Pricing Strategy	Used to indicate the pricing strategy for the claim line items. The valid values are: • Markdown • Markup • None	Not applicable

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Field Name	Field Description	Mandatory (Yes or No)
Markup or Markdown Type	Used to indicate the markup or markdown value type for the claim line items. The valid values are: • Flat Amount • Percentage	Not applicable
Markup or Markdown Amount	Used to specify the markup or markdown amount for the claim line items. **Note:** This field displays amount when **Markup or Markdown Type** field is set as **Flat Amount**.	Not applicable
Markup / Markdown Included in Settlement?	Used to specify whether markup or markdown amount should be included in the level funding settlement. The valid values are: • Yes • No **Note:** This field is required when **Flat Amount** option is selected from the **Markup or Markdown Type** field.	Yes (Conditional) **Note:** This field is required when **Flat Amount** option is selected from the **Markup or Markdown Type** field.

The **Line Items** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Sequence	Displays the sequence number for the line items.	Not applicable
Line Item	Displays the billing line items.	Not applicable
Include in Settlement	Used to indicate whether the line item should be included in the level funded claim pricing settlement.	No
Markup or Markdown Included in Settlement	Used to indicate whether markup or markdown should be included in the level funded claim settlement.	No
Markup or Markdown Percentage Eligibility	Used to indicate whether the line item is eligible or not eligible for markup or markdown percentage. The valid values are: • Eligible • Not Eligible	Not applicable
Markup or Markdown Percentage	Used to indicate the percentage for markup or markdown value.	Not applicable

2. Enter the required details in the appropriate sections, based on the option that is selected from the **Derive Using** field.
3. If you want to add information for more than one claim pricing rule type to the level funded pricing rule, click the **Add** (+) icon and then repeat step 2.

Note: However, if you want to remove information of more than one claim pricing rule type from the level funded pricing rule, click the **Delete** (🗑) icon corresponding to the pricing rule type field.

4. Click **Save**.
   The claim line items are defined in the level funded pricing rule.

Related Topics

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For more information on...	See...
How to define level funded pricing rule for a bill group	Defining a Level Funded Pricing Rule for a Bill Group on page 3278
How to edit level funded pricing rule for a bill group	Editing a Level Funded Pricing Rule of a Bill Group on page 3280

Defining Ancillary Pricing Information in a Level Funded Pricing Rule

Procedure

To define the ancillary pricing information in the level funded pricing rule:

1. Ensure that the **Pricing Information for rule type category : Ancillary** zone is expanded only *w*hen you have selected an option from the **Price Item** field of the **Main** section while defining or editing a level funded pricing rule for a bill group.

   The **Pricing Information for rule type category : Ancillary** zone contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Pricing Rule Type	Used to indicate the ancillary pricing rule type effective for level funded pricing.	Yes
Derive Using	Used to indicate the method through which the ancillary pricing rule information is derived. The valid values are: • Ancillary Billable Charge Line Type • Pricing Rules	Yes

   If **Ancillary Billable Charge Line Type** option is selected from the **Derive Using** field, the following sub-sections appear:

   - **Billable Charge Line Types** - Used to associate the billable charge line items which are eligible for billing.

   The **Billable Charge Line Types** section contains the following field:

Field Name	Field Description	Mandatory (Yes or No)
Billable Charge Line Type	Used to indicate the billable charge line type using which you want to create the calculation line for the charge (i.e. line item). **Note:** The **Search** (🔍) icon appears corresponding to the **Billable Charge Line Type** field. On clicking the **Search** icon, the **Billable Charge Line Type Search** window appears. On specifying the billable charge line type, the description of the billable charge line type appears corresponding to the **Billable Charge Line Type** field.	Yes
Rate Based	Used to indicate that the billable charge line type is rate based.	No
Rate	Used to specify the rate for the billable charge line type.	Yes (Conditional)

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Field Name	Field Description	Mandatory (Yes or No)
	Note: This field is enabled when the **Rate Based** option is selected.	**Note:** This field is required when the **Rate Based** option is selected.
Markup / Markdown Included in Settlement?	Used to indicate that markup or markdown amount must be included in the level funding settlement.	No
Pricing Strategy	Used to indicate the pricing strategy for the billable charge line items. The valid values are: • Markdown • Markup • None	Yes
Markup or Markdown Type	Used to indicate the markup or markdown type for the billable line items. The valid values are: • Flat Amount • Percentage **Note:** This field is enabled when the **Pricing Strategy** option is selected either as **Markup** or **Markdown**.	Yes (Conditional) **Note:** This field is required when the **Rate Based** option is selected either as **Markup** or **Markdown**.
Amount/Percentage	Used to specify the amount or percentage for markup or markdown value. **Note:** This field appears when the **Markup or Markdown Type** option is selected.	Yes (Conditional) **Note:** This field is required when the **Markup or Markdown Type** option is selected.

If **Pricing Rule Type** option is selected from the **Derive Using** field, the following zone appears:

- **Ancillary Pricing Rule** - Used to indicate the ancillary pricing rule. It contains the following sub-section:
  - The **Billable Charge Line Types** - Used to define the billable charge line types for an ancillary pricing rule, eligible for level funding.

The **Ancillary Pricing Rule** section contains the following field:

Field Name	Field Description	Mandatory (Yes or No)
Effective Ancillary Pricing Rule	Used to indicate the ancillary pricing rule effective for level funded pricing.	No

Note: If you are editing a bill group's level funded pricing rule for the **Ancillary** rule type category (where the bill group's pricing has ended), a**Reapply** button appears corresponding to the **Effective Ancillary Pricing Rule** field. You can select an effective ancillary pricing rule and click the **Reapply** button to set a new pricing for the ancillary rule type that is eligible for level funding.

The **Billable Charge Line Types** section contains the following fields:

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Field Name	Field Description	Mandatory (Yes or No)
Sequence	Displays the sequence number for the line items.	Not applicable
Billable Charge Line Type	Used to indicate the billable charge line type using which you want to create the calculation line for the charge (i.e. line item). **Note:** The **Search** (🔍) icon appears corresponding to the **Billable Charge Line Type** field. On clicking the **Search** icon, the **Billable Charge Line Type Search** window appears. On specifying the billable charge line type, the description of the billable charge line type appears corresponding to the **Billable Charge Line Type** field.	Not applicable
Include in Settlement	Used to indicate whether the billable charge line item should be included in the level funded ancillary pricing settlement.	Not applicable
Rate Based	Indicates that the billable charge line type is rate based.	Not applicable
Rate	Displays the rate for the billable charge line type.	Not applicable
Markup / Markdown Included in Settlement?	Used to indicate that markup or markdown amount must be included in the level funding settlement.	Not applicable
Pricing Strategy	Displays the pricing strategy for the billable charge line items. The valid values are: • Markdown • Markup • None	Not applicable
Markup or Markdown Type	Indicates the markup or markdown type for the billable charge line items. The valid values are: • Flat Amount • Percentage **Note:** This field is enabled when the **Pricing Strategy** option is selected either as **Markup** or **Markdown**.	Not applicable
Amount/ Percentage	Displays the amount or percentage which is specified as the markup or markdown value.	Not applicable

2. Enter the required details in the appropriate sections, based on the option selected from the **Derive Using** field.
3. If you want to add information for more than one ancillary pricing rule type to the level funded pricing rule, click the **Add** (+) icon and then repeat step 2.

Note: However, if you want to remove information of more than one ancillary pricing rule type from the level funded pricing rule, click the **Delete** (🗑) icon corresponding to the pricing rule type field.

4. Click **Save**.
   The ancillary line items are defined in the level funded pricing rule.

Related Topics

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For more information on...	See...
How to define level funded pricing rule for a bill group	Defining a Level Funded Pricing Rule for a Bill Group on page 3278
How to edit level funded pricing rule for a bill group	Editing a Level Funded Pricing Rule of a Bill Group on page 3280

Defining Discount Arrangement Pricing Information in a Level Funded Pricing Rule

Procedure

To define the discount arrangement pricing information in the level funded pricing rule:

1. Ensure that the **Pricing Information for rule type category : Discount** zone is expanded only when you have selected an option from the **Price Item** field of the **Main** section while defining or editing a level funded pricing rule for a bill group.

   The **Pricing Information for rule type category : Discount** zone contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Pricing Rule Type	Used to indicate the discount arrangement pricing rule type which is effective for level funding.	Yes
Derive Using	Used to indicate the method through which the discount arrangement pricing rule information is derived. The valid values are: • Pricing Rules	Yes

   On selecting the **Pricing Rule Type** option from the **Derive Using** field, the following sub-section appears:

   - **Discount Pricing Rule** - Used to indicate the discount arrangement pricing rule. It contains the following field:

Field Name	Field Description	Mandatory (Yes or No)
Discount Pricing Rule	Used to indicate the discount arrangement pricing rule which is effective for level funding.	Yes

2. Select the appropriate discount arrangement pricing rule from the **Discount Pricing Rule** section.

> **Note:**
>
> On selecting the discount arrangement pricing rule, the system does not generate any line items for the discount arrangement pricing information. This discount arrangement pricing rule is used at the time of level funding calculations in the TFM module.

3. If you want to add information for more than one discount pricing rule type to the level funded pricing rule, click the **Add** (+) icon and then repeat step 2.

> **Note:** However, if you want to remove information of more than one discount pricing rule type from the level funded pricing rule, click the **Delete** (🗑) icon corresponding to the pricing rule type field.

4. Click **Save**.
   The discount arrangement pricing information is defined in the level funded pricing rule.

Related Topics

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For more information on...	See...
How to define level funded pricing rule for a bill group	Defining a Level Funded Pricing Rule for a Bill Group on page 3278
How to edit level funded pricing rule for a bill group	Editing a Level Funded Pricing Rule of a Bill Group on page 3280

Defining Retention Type Claim Based and/or Retention Type Enrollment Based Pricing Rule Information in a Level Funded Pricing Rule

Procedure

To define the retention type claim based and/or retention type enrollment based pricing rule information in a level funded pricing rule:

1. Ensure that the **Pricing Information for rule type category : Retention** zone is expanded when you have selected an option from the **Price Item** field of the **Main** section while defining or editing a level funded pricing rule for a bill group.

   The **Pricing Information for rule type category : Retention** zone contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Retention Rule Type	Used to indicate the retention type claim based and/or retention type enrollment based pricing rule type for the level funded pricing rule.	Yes
Price Item	Used to indicate the price item for the level funded pricing rule. **Note:** The **Search** (🔍) icon appears corresponding to the **Price Item** field. On clicking the **Search** (🔍) icon corresponding to the **Price Item** field, the **Get Retention Type Pricing Rules** window appears. On specifying the retention type pricing rule, the description of the retention type pricing rule appears corresponding to the **Price Item** field.	Yes

2. Select the appropriate **Retention Rule Type** and **Price Item** from the **Pricing Information for rule type category : Retention** zone.

Note:

Once the retention type claim based and/or retention type enrollment based pricing rule type is selected along with the price item, the system does not generate line items for the retention type claim/enrollment based pricing rule. This retention type claim/enrollment based pricing rule is used at the time of level funding calculations in the TFM module.

3. If you want to add more than one retention type claim based and/or retention type enrollment based pricing rule type to the level funded pricing rule, click the **Add** (+) icon and then repeat step 2.

Note: However, if you want to remove more than one retention type claim based and/or retention type enrollment based pricing rule type from the level funded pricing rule, click the **Delete** (🗑) icon corresponding to the pricing rule type field.

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4. Click **Save**.
   The retention type claim based and/or retention type enrollment based pricing rules eligible for level funding are defined in the level funded pricing rule.

Related Topics

For more information on...	See...
How to define level funded pricing rule for a bill group	Defining a Level Funded Pricing Rule for a Bill Group on page 3278
How to edit level funded pricing rule for a bill group	Editing a Level Funded Pricing Rule of a Bill Group on page 3280

Defining a Characteristic for a Level Funded Pricing Rule

Prerequisites

To define a characteristic for a level funded pricing rule, you should have:

- Characteristic types defined in the application (where the characteristic entity is set to **Pricing Rule**).

Procedure

To define a characteristic for a level funded pricing rule:

1. Ensure that the **Characteristics** section is expanded when you are defining or editing a *l*evel funded pricing rule.

   The **Characteristics** section contains the following fields in the grid:

Column Name	Column Description	Mandatory (Yes or No)
Effective Date	Used to specify the date from when the characteristic is effective for a level funded pricing rule.	Yes (Conditional) **Note:** This field is required when you are defining a characteristic for a level funded pricing rule.
Characteristic Type	Used to indicate the characteristic type. **Note:** The list includes only those characteristic types where the characteristic entity is set to **Pricing Rule**.	Yes (Conditional) **Note:** This field is required when you are defining a characteristic for a level funded pricing rule.
Characteristic Value	Used to specify the value for the characteristic type. **Note:** If you select a predefined characteristic type, the **Search** (🔍) icon appears corresponding to the **Characteristic Value** field. On clicking the **Search** icon, the **Predefined Characteristic Search** window appears. On specifying the value for a predefined characteristic type, the description of the characteristic value appears corresponding to the **Characteristic Value** field.	Yes (Conditional) **Note:** This field is required when you are defining a characteristic for a level funded pricing rule.

2. Enter the required details in the **Characteristics** section.

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3. If you want to define more than one characteristic for the level funded pricing rule, click the **Add** (+) icon and then repeat step 2.

> **Note:** However, if you want to remove a characteristic from the level funded pricing rule, click the **Delete** (🗑) icon corresponding to the characteristic.

4. Click **Save**.
   The characteristics are defined for the level funded pricing rule.

Related Topics

For more information on...	See...
How to define a level funded pricing rule for a parent customer	Defining a Level Funded Pricing Rule for a Parent Customer on page 3265
How to edit a level funded pricing rule of a parent customer	Editing a Level Funded Pricing Rule of a Parent Customer on page 3267
How to define a level funded pricing rule for a bill group	Defining a Level Funded Pricing Rule for a Bill Group on page 3278
How to edit a level funded pricing rule for a bill group	Editing a Level Funded Pricing Rule of a Bill Group on page 3280

Minimum Premium Program

To keep up with the changing healthcare dynamics and reduce the rising cost of employer sponsored health plans, the Administrative Services Only (ASO) service providers are constantly thriving to develop innovative pricing models. The ASO service providers are at the forefront designing alternative funding arrangements by amalgamating fully-insured and self-funded plans to trade-off some of the disadvantages of traditional models. The alternative funding arrangements make the self-funded plans more viable to small and medium size employers who traditionally go for the fully-insured plans.

A minimum premium program (MPP) is a self-funded plan that is partly self-insured where an employer is responsible to pay for claims up to a certain level and the remaining is covered by the ASO service provider. A premium is charged to the employer by the ASO service provider for undertaking the risk, processing the claims and for providing all other administrative services.

The following terminologies are used with respect to the minimum premium program:

- **Minimum Premium** - A premium which is paid for the minimum premium program by the employer to the ASO service provider.
- **Capping Limit (i.e. MPP Limit)** - The claim amount within the MPP limit is paid by the employer; whereas the amount exceeding the MPP limit is paid by the ASO service provider.
- **Minimum Attachment Point (MAP)** - This is a guaranteed claim liability by an employer to safeguard the insurer from the financial risk if the enrollment is drastically declines.
- **Effective MPP Limit** - The MPP limit and MAP value whichever is greater is considered as the effective MPP limit.

Oracle Revenue Management and Billing provides the ability to setup the minimum premium program pricing model. You can define a minimum premium program pricing rule at the parent customer and bill group levels. You can define minimum premium program pricing rules for parent customers and bill groups from the **Customer 360° Information** screen. You can define a minimum premium program pricing rule using a minimum premium program pricing rule type.

> **Note:** You cannot create a minimum premium program pricing rule type and a minimum premium program pricing rule through an inbound message.

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A minimum premium program pricing rule type is not a primary pricing rule type. You must include a minimum premium program pricing rule type as a related pricing rule type in the claim or ancillary pricing rule types which are used for calculating the claim amount or ancillary charges, respectively.

While creating a minimum premium program pricing rule type, you need to do the following:

- Set the pricing rule type business object to **Minimum Premium Program Pricing Rule Type**
- Set the pricing rule type category to **Minimum Premium Program**
- Set the pricing rule business object to **Minimum Premium Program Pricing Rule**
- Specify algorithms for the following system events:

System Event	Algorithm
Accumulation Pre-Processing	C1-MPPACPREP
Account and Price Item Derivation	C1_ACCPRISL
Bill After Date Determination	C1_BAFTDRV
Bill Group Derivation	C1_TXNBGDRV
Final Settlement Derivation	C1-FSBCDV

- Specify the price items (i.e. services related to minimum premium program) for which you want to define pricing using a minimum premium program pricing rule
- Specify the rate options that you can use while defining pricing for a price item
- Specify different types of accounts to which the price item should be billed based on the priority

Note: Ideally, the price item parameters should not be specified in a minimum premium program pricing rule type. The price item parameters which are specified in the claim or ancillary pricing rule type are used for minimum premium program accumulation.

- Specify additional information, such as:
  - Pricing rule type and price item to derive the pricing rule using which the enrollment based MPP limit is calculated

    Note: At present, we are not supporting flat MPP limit for the minimum premium program pricing model.
  - Off process request type using which the deficit should be roll forwarded during the policy renewal
  - MPP, surplus, and deficit billable charge line types using which you want to create the respective charges
  - Number of days before which you want to create a To Do for reminding the self-funded employer to renew the minimum premium program
- Specify the details for the minimum attachment point arrangement:
  - Pricing rule type and price item using which the minimum attachment point pricing rule should be created
  - Specify default values for the following:
    - **Minimum Attachment Point Arrangement Type** - Used to specify the method using which minimum attachment point should be calculated. The system supports the following methods:
      - **Enrollment Percentage of First Month** - Here, the minimum attachment point is calculated using the enrollment based percentage of the first month's MPP limit. For example, If the enrollment based percentage of the first month's MPP limit is set to 75, the system sets the minimum attachment point to (75*First Month's MPP Limit)/100.
      - **Enrollment Percentage of Previous Month** - Here, the minimum attachment point is calculated using the enrollment based percentage of the previous month's MPP limit. For example, If the enrollment based percentage of the previous month's MPP limit is set to 90, the system sets the minimum attachment point to (90*Previous Month's MPP Limit)/100.
      - **Flat Amount** - Here, the minimum attachment point is set to a flat amount.
    - **Default Arrangement Value** - Used to specify default percentage or flat amount for minimum attachment point. You can change the value (if required) while defining a minimum premium program pricing rule using the respective pricing rule type.

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- Specify settlement rules, such:
  - How to settle any deficit or surplus when the customer decides to cancel or renew the policy
  - Whether the system should close out or roll forward the deficit or surplus on policy renewal
  - Whether the system should close out the deficit or surplus on policy cancelation

Once a minimum premium program pricing rule type is defined, you can create minimum premium program pricing rules using the minimum premium program pricing rule type. While defining a minimum premium program pricing rule for a parent customer, you need to specify the following:

- Minimum premium program accumulation price item for which you want to define the pricing
- Specific stop-loss pricing rule of the parent customer whose accumulation parameters you want to inherit for the minimum premium program. On selecting a specific stop-loss pricing rule, the minimum premium program pricing date range is set automatically. The minimum premium program pricing date range is same as the specific stop-loss pricing rule.
- Rate option that you want to use while defining the minimum premium program pricing
- Settlement frequency which helps to determine the bill after date. The valid values are:
  - **Immediately** - If you select this option from the list, the bill after date is not calculated. The minimum premium program settlement billable charge is billed immediately in the next bill cycle.
  - **Manually (At Required Intervals)** - If you select this option from the list, the bill after date which is specified in the **Manual Settlement Bill After Date** parameter while executing the **C1-BCMPP** batch is stamped on the minimum premium program settlement billable charge.
  - **Monthly** - If you select this option from the list, the bill after date is set as per the bill cycle.
  - **Yearly** - If you select this option from the list, the bill after date is set to the pricing end date in the minimum premium program settlement billable charge.
  - **On Settlement** - If you select this option from the list, the bill after date is set to the settlement date in the minimum premium program settlement billable charge.

  Note: The accumulation parameters, such as incurred start date, incurred end date, paid start date, paid end date, and settlement days are automatically inherited from the parent customer's specific stop-loss pricing rule. You cannot change any accumulation parameter except the settlement days.
- Settlement days which helps to calculate the settlement date (which is pricing end date, incurred end date, or paid end date whichever is later + the settlement days)
- Settlement account for which the minimum premium program settlement billable charge should be created
- Minimum premium attachment point and its value using which the effective MPP limit is calculated
- Whether the customer would like to renew or cancel the minimum premium program

However, while defining a minimum premium program pricing rule for a bill group, you need to specify the following:

- The policy status in which the minimum premium program pricing rule is applicable.
- Minimum premium program accumulation price item for which you want to define the pricing
- Parent customer's minimum premium program pricing rule from which you want to inherit the accumulation parameters.

  Note: The pricing date range is derived from the parent customer's minimum premium program pricing rule because the minimum premium program pricing rules of parent customer and bill group should have the same date range.
- Rate option that you want to use while defining the minimum premium program pricing
- Accumulation criteria that indicates the price items whose charges can be accumulated against the minimum premium program accumulation price item so that it can be settled against the minimum premium program premium.
- Whether the line items and markup or markdown in a particular claim pricing rule should be accumulated for minimum premium program.

  OR

  Whether the line items which are associated with the **Minimum Premium Program** pricing rule type category should be accumulated for minimum premium program.

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- Whether the charges created using the billable charge line types in a particular ancillary pricing rule should be accumulated for minimum premium program.

  OR

  Whether the charges created using the billable charge line types where the **Pricing Rule Type Category** characteristic is set to **Ancillary** should be accumulated for minimum premium program.
- Whether the charges calculated using the retention type claim based or retention type enrollment based pricing for a price item should be accumulated for minimum premium program.

Once a minimum premium program pricing rule is defined for a bill group, the system creates a price assignment in a price list and assigns the price list to the bill group.

You must create an algorithm using the **C1-ASOEXPOS** algorithm type and attach it to the **TFM - Rate Post-Processing** algorithm spot of the division to which the bill group's account belongs. Otherwise, erroneous results might occur. For more information about the algorithm, refer to the application.

The following new batches are introduced in this release:

- **C1-ACMPP** - This batch is used to accumulate the minimum premium program billable charges which are to be settled against the minimum premium program premium. It creates an accumulation record for an active accumulation group of an account whose bill cycle window is open. It calculates the following:
  - Minimum Attachment Point
  - MPP Limit (Enrollment X MPP Limit Rate)
  - Effective MPP Limit
  - Cumulative MPP Limit
  - Claims
  - Specific Stop Loss (Credit)/Debit Adjustments
  - Net Claims
  - Cumulative Net Claims
  - Max Claim Liability (Monthly Billed Claim)
  - Cumulative Billed Claims
  - Minimum Premium Adjustment Amount
  - Cumulative Surplus/Deficit
  - Roll Forward Charge

  This batch also invokes algorithms which are attached to the **Accumulation Pre-Processing** and **Accumulation Post-Processing** system events in the respective pricing rule type and accordingly updates the accumulation record.
- **C1-BCMPP** - This batch is used to create a billable charge for a minimum premium program accumulation records. The charge contains the minimum premium adjustment amount which is calculated by the **C1-ACMPP** batch. This batch also creates the roll forward billable charge on the successive pricing rule, if applicable, based on the settlement configuration. It calculates and stamps the bill after date on the minimum premium program settlement billable charge.

  This batch also invokes algorithms which are attached to the **Accumulation Billable Charge Pre-Processing** and **Accumulation Billable Charge Post-Processing** system events in the respective pricing rule type and accordingly updates the minimum premium program settlement billable charge.
- **C1-CMMPP** - This batch is used to do the following:
  - Update the MPP billable charge ID on the respective transaction legs in the **CI_TXN_DTL_PRITM** table
  - Mark the transaction as **COMP** if it is in **IGNR** status in the **CI_TXN_DETAIL** table
  - Update the transaction aggregation criteria of the corresponding records in the **CI_TXN_CALC** table to **RITA**

You can opt to configure approval workflow for a minimum premium program pricing rule. The **C1PRRLMPPN** approval workflow group is shipped for the minimum premium program pricing rules. You need to create an appropriate approval workflow chain, approval workflow criterion type, approval workflow group chain linkage, and approval workflow settings for the **C1PRRLMPPN** approval workflow group. Once the approval workflow configuration is

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done, ensure that **C1PRRLMPPN** is specified in the **Approval Workflow Group for MPP** option type of the **C1-ASOBLLNG** feature configuration.

Self-Funded Pricing Rule Versioning

Until now, the system enabled you to edit a self-funded pricing rule when it is not referred for any transaction in the system. If you wanted to edit a referred pricing rule, you had to manually cancel bill segments of the accounts and create the disaggregation and/or reseeding requests for the accounts. Once the transactions are disaggregated, the system allowed you to edit the self-funded pricing rule.

Now, the system enables you to edit a self-funded pricing rule even when it is referred for a transaction in the system. On editing a referred self-funded pricing rule, the system will do the following:

- Automatically cancel the bill segments of the accounts and create the disaggregation and/or reseeding requests for the accounts
- Increment the version of the referred self-funded pricing rule in the system

Now, the system maintains version numbers for a self-funded pricing rule. On creating a self-funded pricing rule, the version number of the self-funded pricing rule is set to 1. Also, when a self-funded policy is renewed, the version number of each self-funded pricing rule is set to 1.

If a self-funded pricing rule is referred for a transaction, the system creates a new version of the self-funded pricing rule when you edit it. The system does versioning of a self-funded pricing rule when a set of pre-defined fields are edited. For more information about the fields for which versioning is configured, refer to *Oracle Revenue Management and Billing Insurance User Guide*. The system will automatically cancel the bill segments and create the disaggregation and/or reseeding requests for the accounts when you implement the **Entity Audit** feature for the self-funded pricing rules. The entity audit framework is configured for the following business objects in this release:

- C1-PricingRuleAncillary
- C1-PricingRuleClaim
- C1-PricingRuleRetEnroll
- C1-PricingRuleRetTypeClaim
- C1-PricingRuleASL
- C1-PricingRuleSSL
- C1-PricingRuleLevelFunded
- C1-PricingRuleDiscArrangement

The **Eligible for Audit Event** option type in all the above listed business objects is set to **Y** and the **C1-PRVERSION** algorithm is attached to the **Audit** system event of the above listed business objects.

To implement the **Entity Audit** feature, you need to create an active audit event type for the above listed business objects where the audit usage is set to **Disaggregation/Reseeding**. Here, you need to specify a list of fields from the respective business object which you want to audit or monitor. The following audit event types are shipped for the respective pricing rule business object:

Business Object	**Audit Event Type**
C1-PricingRuleAncillary	ANCIL_DISAGG_AUD
C1-PricingRuleClaim	CLAIM_DISAGG_AUD
C1-PricingRuleRetEnroll	ENROL_RETEN_DISAGG_AUD
C1-PricingRuleRetTypeClaim	CLAIM_RETEN_DISAGG_AUD
C1-PricingRuleASL	ASL_DISAGG_AUD
C1-PricingRuleSSL	SSL_DISAGG_AUD

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Business Object	Audit Event Type
C1-PricingRuleLevelFunded	LF_DISAGG_AUD
C1-PricingRuleDiscArrangement	DISC_DISAGG_AUD

You can use the above audit event types or create a custom audit event type for the required business object. On editing a referred self-funded pricing rule, the system does the following:

If…	Then…
The approval workflow process is configured for the respective pricing rule and you edit a field which is: • Listed in the active audit event type of the respective business object • Configured for versioning	The system creates an approval transaction for the self-funded pricing rule. On approving the approval transaction, the system creates a new version of the self-funded pricing rule where the version number is incremented by 1. The status of the new version of the self-funded pricing rule is set to **Disaggregation Initiated**. In addition, the system creates an audit event using the active audit event type for the new version of the self-funded pricing rule. The status of the audit event is set to **Pending**.
The approval workflow process is not configured for the respective pricing rule and you edit a field which is: • Listed in the active audit event type of the respective business object • Configured for versioning	The system creates a new version of the self-funded pricing rule where the version number is incremented by 1. The status of the new version of the self-funded pricing rule is set to **Disaggregation Initiated**. In addition, the system creates an audit event using the active audit event type for the new version of the self-funded pricing rule. The status of the audit event is set to **Pending**.
The approval workflow process is configured for the respective pricing rule and you edit a field which is: • Not listed in the active audit event type of the respective business object • Configured for versioning	The system creates an approval transaction for the self-funded pricing rule. On approving the approval transaction, the system creates a new version of the self-funded pricing rule where the version number is incremented by 1. The status of the new version of the self-funded pricing rule is set to **Active** and the status of the old version of the self-funded pricing rule is changed to **Inactive**.
The approval workflow process is not configured for the respective pricing rule and you edit a field which is: • Not listed in the active audit event type of the respective business object • Configured for versioning	The system creates a new version of the self-funded pricing rule where the version number is incremented by 1. The status of the new version of the self-funded pricing rule is set to **Active** and the status of the old version of the self-funded pricing rule is changed to **Inactive**.
The approval workflow process is configured for the respective pricing rule and you edit the end date of a self-funded pricing rule which is referred for a transaction after the pricing rule end date	The system creates an approval transaction for the self-funded pricing rule. On approving the approval transaction, the changes are reflected in the existing version of the self-funded pricing rule. Note that the system does not create a new version of the self-funded pricing rule. The system creates an audit event using the active audit event type for the existing version of the self-funded pricing rule. The status of the audit event is set to **Pending**.
The approval workflow process is not configured for the respective pricing rule and you edit the end date of a self-funded pricing rule which is referred for a transaction after the pricing rule end date	The system does not create a new version of the self-funded pricing rule. The changes are reflected in the existing version of the self-funded pricing rule. The system creates an audit event using the active audit event type for the existing version of the

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If…	Then…
	self-funded pricing rule. The status of the audit event is set to **Pending**.

Note that the new version of the self-funded pricing rule will have the same pricing rule ID. However, on editing a self-funded pricing rule which is not referred for a transaction, the system edits the existing version of the self-funded pricing rule and does not create a new version of the self-funded pricing rule with incremental version number.

A new batch named **C1-DISTA** is introduced in this release. The **C1-DISTA** batch checks whether there are any audit events for the self-funded pricing rules in the **Pending** status. If an audit event for a self-funded pricing rule is in the **Pending** status, the system checks whether the self-funded pricing rule is created using a primary pricing rule type. If so, the system derives the person for whom the self-funded pricing rule is created. If the person type of the derived person is **Parent Customer**, the system fetches all accounts of the parent customer and its bill groups. However, if the person type of the derived person is **Bill Group**, the system fetches all accounts of the bill group. Once the accounts are derived, the system cancels the bill segments of the accounts and creates a disaggregation request for these accounts. The system then confirms whether you want to create reseeding requests for the related pricing rule types (if any). If you click the **OK** button, the system creates the reseeding requests. While creating a reseeding request for a related pricing rule type, the system derives all accounts from the accumulation group and then creates a reseeding request for each such account. Finally, the batch changes the status of the audit event to **Complete**.

Once the disaggregation and reseeding requests are created for the accounts, you need to disaggregate the transactions using the disaggregation batches. On executing the **C1-DRSUA** batch, the system changes the status of the disaggregation or reseeding request to **Complete** and then executes the **C1-UPDAUDEVE** algorithm attached to the **Post-Processing** system event of the batch control. This algorithm changes the status of the new version of the self-funded pricing rule (for which disaggregation is completed) to **Active** and changes the status of the old version of the self-funded pricing rule to **Inactive**.

Note that you cannot edit a self-funded pricing rule in the **Active** status when an audit event for the self-funded pricing rule is in the **Pending** status. You cannot edit or delete a self-funded pricing rule which is in the **Disaggregation Initiated** status. Also, you cannot edit the related self-funded pricing rule in the **Active** status when the new version of the primary self-funded pricing rule is in the **Disaggregation Initiated** status.

Retention Type Enrollment Tier Based Pricing

Until now, you were able to calculate certain charges, such as stop-loss premium, administrative fees, etc. based on number of enrollments using the retention type enrollment based pricing. While defining a retention type enrollment based pricing rule, you were able to define different fees for different set of pricing parameters. There are certain services (i.e., price items) for which business needs to define a complex pricing model wherein several pricing variations are offered based on certain mandatory and non-mandatory pricing parameters. While defining, editing, or copying a retention type enrollment based pricing rule with a complex pricing model, the system performance was deteriorated, thereby affecting the system reliability and usability over time.

To handle the above business scenario, a multi-tiered retention type enrollment based pricing model is offered in this release. The system enables you to define the following two types of retention type enrollment based pricing rules in the system:

- Retention Type Enrollment Based Pricing Rule without Tier (Traditional method)
- Retention Type Enrollment Based Pricing Rule with Tier

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

- The **tieredSw** tag is newly added in the **C1-PrcRuleTypRetEnrollBased** business object schema.
- A new business object named **C1-PricingRuleRetTypeEnrolTier** is introduced in this release.
- A new option type named **Approval Workflow Group for Retention Type Enrollment Tier** is added in the **C1-ASOBLLNG** feature configuration.

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A new field named **Tiered Switch** is available in the **Enrollment-Specific Additional Data** section while defining a retention type enrollment based pricing rule type. It enables the system to determine whether the retention type enrollment based pricing rule will be tier or non-tier based. If you select the **Tiered Switch** option, you need to set the pricing rule business object to **C1-PricingRuleRetTypeEnrolTier** in the retention type enrollment based pricing rule type. However, if you do not select the **Tiered Switch** option, you need to set the pricing rule business object to **C1-PricingRuleRetTypeEnroll** in the retention type enrollment based pricing rule type. In this way, you can maintain two separate retention type enrollment based pricing rule types in the system – one without tier and another with tier.

Before you create multi-tiered retention type enrollment based pricing rule, you need to create the following:

- Required parameters including the **Tier** parameter where all the possible business tiers (for example, Spouse + 1 Dependent, Spouse + 2 Dependents, Family, etc.), are set as the predefined values.
- Associate the required parameter (for example, Healthcare Coverage Class) as the mandatory parameter with the price item

  Note: (The system will then, by default, select the mandatory parameter while defining the pricing (i.e., fee) in the pricing rule.)
- Associate the **Tier** parameter as the non-mandatory parameter with the price item.

While defining a pricing rule using the multi-tiered retention type enrollment based pricing rule type, the **Tier** button appears in the **Pricing Parameters** grid. Once you click the **Tier** button, all the business tiers set as the predefined values (for example, Spouse + 1 Dependent, Spouse + 2 Dependents, Family, etc.) are listed in the **Pricing Parameters** grid. You can then specify different fee for each mandatory pricing parameter and tier combination. Until the pricing rule is referred, you can anytime remove the tiers by clicking the **Remove Tier** button and define a non-tier based pricing, if required.

The system creates one price assignment for each mandatory pricing parameter and tier combination. You can define a multi-tiered retention type enrollment based pricing rule at the parent customer and bill group levels. You can also configure the approval workflow process for a multi-tiered retention type enrollment based pricing rule.

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Chapter 37

Stop-Loss

Topics:

- Accumulation Data

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

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

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

Accumulation Data

The **Accumulation Data** screen enables you to view the aggregate stop-loss, discount, level funded, minimum premium program, and specific stop-loss accumulation details. It contains the following zones:

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

You can navigate to the **Accumulation Data** screen from the **Transaction and Audit Event Management** menu.

Related Topics

For more information on...	See...
Search Accumulation Data zone	Search Accumulation Data on page 3304

Search Accumulation Data

The **Search Accumulation Data** zone allows you to search for the accumulation data using various search criteria. This zone contains the following two sections:

- **Search Criteria** - The **Search Criteria** section contains the following fields:

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Field Name	Field Description	Mandatory (Yes or No)
Search By	Used to indicate whether you want to search for an accumulation data using the accumulation or billable charge details. The valid values are: • **Accumulation Details** - Used when you want to search for an accumulation data using the accumulation details. • **Billable Charge Details** - Used when you want to search for an accumulation data using the billable charge details. **Note:** By default, the **Accumulation Details** option is selected.	Yes
Billable Charge ID	Used to search an accumulation data for a particular billable charge. **Note:** This field appears when you select the **Billable Charge Details** option from the **Search By** field.	Yes
Accumulation Category	Used to search an accumulation data for a particular accumulation category. The valid values are: • **All** • **Aggregate Stop-Loss** • **Discount Arrangement** • **Level Funded** • **Minimum Premium Program** • **Specific Stop-Loss** **Note:** By default, the **All** option is selected.	Yes (Conditional) **Note:** This field is required when the **Accumulation Details** option is selected from the **Search By** list.
Parent Person ID	Used to search an accumulation data for a particular parent person ID. **Note:** The **Search** (🔍) icon appears corresponding to this field. On clicking the **Search** icon, the **Person Search** window appears.	Yes (Conditional) **Note:** This field is required when: • The **All** option is selected from the **Accumulation Category** list. • The **Active** or **Completed** option is selected from the **Parent Accumulation Group Status** list.
Parent Person Name	Used to specify the parent person name based on which you want to search an accumulation data.	Yes (Conditional)

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Field Name	Field Description	Mandatory (Yes or No)
		Note: This field is required when: • The **All** option is selected from the **Accumulation Category** list. • The **Active** or **Completed** option is selected from the **Parent Accumulation Group Status** list.
Account ID	Used to search an accumulation data for a particular account. **Note:** The **Search** (🔍) icon appears corresponding to this field. On clicking the **Search** icon, the **Account Search** window appears.	Yes (Conditional) **Note:** This field is required when: • The **All** option is selected from the **Accumulation Category** list. • The **Active** or **Completed** option is selected from the **Parent Accumulation Group Status** list.
Parent Accumulation Group ID	Used to search an accumulation data for a particular parent accumulation group. **Note:** The **Search** (🔍) icon appears corresponding to this field. On clicking the **Search** icon, the **Accumulation Group Search** window appears.	Yes (Conditional) **Note:** This field is required when: • The **All** option is selected from the **Accumulation Category** list. • The **Active** or **Completed** option is selected from the **Parent Accumulation Group Status** list.
Parent Accumulation Group Status	Used to search an accumulation data for a particular parent accumulation group status. The valid values are: • **Active** • **Completed**	No

Note: You must specify at least one search criterion while searching for the accumulation data.

- **Search Results** - On clicking the **Search** button, the search results appear based on the specified search criteria. The **Search Results** section contains the following columns:

Column Name	Column Description
Parent Accumulation Group ID	Indicates the parent accumulation group for which the accumulation data exists.
Status	Indicates the parent accumulation group status. The valid values are:

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Column Name	Column Description
	• **Active** • **Completed**
Parent Person Information	Indicates the information about the parent person. In addition, this column has a context menu which helps in navigating to other screens in the application. **Note:** It has a link. On clicking the link, the **Person** screen appears where you can view the details of the respective parent person.
Accumulation Category	Indicates the category for which the accumulation data exists. The valid values are: • **Aggregate Stop-Loss** • **Discount Arrangement** • **Level Funded** • **Minimum Premium Program** • **Specific Stop-Loss**
Pricing Rule Information	Displays information about the pricing rule used in the accumulation.

On clicking the **Broadcast** (ᯤ) icon corresponding to the parent accumulation group ID column, the **Accumulation Amount** zone appears with the details of the respective accumulation category.

Related Topics

For more information on...	See...
How to search for an accumulation data	Searching for an Accumulation Data on page 3307

Searching for an Accumulation Data

Procedure

To search for an accumulation data:

1. Click the **Menu** link in the **Application** toolbar.
   A list appears.
2. From the **Main** menu, select **Transaction and Audit Event Management** and then click **Accumulation Data**.
   The **Accumulation Data** screen appears.
3. Enter the search criteria in the **Accumulation Data** zone.

   Note: ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.
4. Click **Search**.
   A list of accumulation data that meets the search criteria appears in the **Search Results** section.

Related Topics

For more information on...	See...
Search Accumulation Data zone	Search Accumulation Data on page 3304

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Chapter 38

Self-Funded Billing

Topics:

- Pre-requisites
- Bill Group Derivation and Pricing Parameters
- Related Pricing Rule Type Eligibility
- Price Item Eligibility
- Self-Funded Billing Process
- Bill Group Derivation
- Account and Price Item Derivation (for the Claim Pricing Rule Type Category)
- Account and Price Item Derivation (for the Specific Stop-Loss and Aggregate Stop-Loss Pricing Rule Type Categories)
- Account and Price Item Derivation (for the Retention Type Claim Based Pricing Rule Type Category)
- Account and Price Item Derivation (for the Retention Type Enrollment Based Pricing Rule Type Category)
- Account and Price Item Derivation (for the Ancillary Pricing Rule Type Category)
- Bill After Date Determination
- Advance Billing for Claim Fund Charge
- SSL Accumulation across Bill Groups
- Trigger Repricing on Deleting Derivation and Pricing Parameters of a Bill Group

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

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

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

The **Transaction Feed Management (TFM)** module is enhanced to support the self-funded billing. You can upload the claim, enrollment, and ancillary transactions in the system using the **File Upload Interface** feature. You can use the **File Upload Interface** feature to upload transaction data files in the following formats:

- Comma Separated Values
- JavaScript Object Notation
- Fixed Position
- Pipe Separated Values
- Tilde Separated Values
- Extensible Markup Language

Once the claim, enrollment, and ancillary transaction data files are uploaded in the system, you need to:

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

The system provides the flexibility to rate the claim, enrollment, and ancillary transactions either prior to billing or during billing. Based on the business

requirements, you can configure the system such that transactions mapped to a price item can be rated at a frequency which is different from the account's billing frequency. For example, daily, weekly, etc.

A new pricing model is introduced for the self-funded health insurance business which enables you to create pricing rules for:

- Claim
- Specific Stop-Loss
- Aggregate Stop-Loss
- Claim Based Fees
- Enrollment Based Fees
- One-time and Recurring Flat Fees
- Ancillary Charges

Once you create the required pricing structure, you can bill for the claim, enrollment, and ancillary transactions. Once the billable charges for claims, claim based fees, enrollment based fees, and ancillary are created through the transaction aggregation process, you can accumulate the specific stop-loss and aggregate stop-loss and create billable charges for them. Once the required billable charges are created, you can bill them using the charge-based billing batches.

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Pre-requisites

To setup the Self-Funded Billing feature, you need to do the following:

- Define the parent customers and bill groups in the system.
- Define the required pricing rule types for different pricing rule type categories, such as **Claim**, **Specific Stop-Loss**, **Aggregate Stop-Loss**, **Retention Type Claim Based**, **Retention Type Enrollment Based**, **Flat Fees**, and **Ancillary**.
- Map the transaction fields appropriately in the primary pricing rule types.
- Attach an algorithm created using the **C1_TXNBGDRV** algorithm type to the **Bill Group Derivation** system event of the pricing rule type where the pricing rule type category is set to **Claim** or **Retention Type Enrollment Based**.
- Attach an algorithm created using the **C1_ACCPRIDRV** algorithm type to the **Account and Price Item Derivation** system event of the pricing rule type where the pricing rule type category is set to **Claim**, **Retention Type Claim Based**, **Retention Type Enrollment Based**, or **Ancillary**.
- Attach an algorithm created using the **C1_ACCPRISL** algorithm type to the **Account and Price Item Derivation** system event of the pricing rule type where the pricing rule type category is set to **Specific Stop-Loss** or **Aggregate Stop-Loss**.
- Attach an algorithm created using the **C1_BAFTDRV** algorithm type to the **Bill After Date Determination** system event of the pricing rule type where the pricing rule type category is set to **Claim**, **Retention Type Claim Based**, **Retention Type Enrollment Based**, or **Ancillary**.
- Attach an algorithm created using the **SA_DERV_POPC** algorithm type to the **TFM - Contract Derivation** algorithm spot of the required divisions.
- Attach an algorithm created using the **C1-VRPR_POPC** algorithm type to the **TFM - Verify Pricing Post-Processing** algorithm spot of the required divisions.
- Attach an algorithm created using the **C1_BCHG_POPC** algorithm type to the **TFM - Billable Charge Post-Processing** algorithm spot of the required divisions.
- Map each transaction record type to either the required rule type or primary pricing rule type.
- Define the pricing groups for the required bill groups.
- Define the required pricing rules for the parent customer and bill groups.
- Define the rate schedules with the following calculation algorithms for different price items:

Price item related to....	**Calculation Algorithm**
Claim	C1-CLAIMCALC
Specific Stop-Loss	C1-SSLRTCALC
Aggregate Stop-Loss	C1-ASLRTCALC
Retention Type Enrollment Based	None
Flat Fees	None
Ancillary	C1-ANCICALC

- Attach an algorithm created using the **C1-RETFLAT** algorithm type to the **TFM - Rate Pre-Processing** algorithm spot of the required divisions.
- Define the TFM information in the rating option for different price items in the following manner:

  The following table lists the TFM information which must be defined in the rating option for the respective type of price items:

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Price item related to....	Rate Option			
	Aggregate Transaction	**Aggregation Schedule**	**Ignore Transaction**	**Rating Criteria**
Claim	Yes	As Required	No	RITA
Specific Stop-Loss	No	-	Yes	RITX
Aggregate Stop-Loss	No	-	Yes	RITX
Retention Type Claim Based	Yes	As Required	No	RITA
Retention Type Enrollment Based	Yes	As Required	No	RITA
Ancillary	Yes	As Required	No	RITA

- Define the derivation and pricing parameters for each bill group.
- Set the following option types in the **C1-ASOBLLNG** feature configuration:
  - Person Relationship Type
  - Bill Group Policy Person Role
  - Invoice Type Characteristic Type
  - Pricing Group Rule Parameter
  - Billable Charge Line Type Parameter
  - Pricing Arrangement Parameter

Related Topics

For more information on...	See...
How to set up the **C1-ASOBLLNG** feature configuration	Setting the C1-ASOBLLNG Feature Configuration on page 4417

Bill Group Derivation and Pricing Parameters

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

Oracle Revenue Management and Billing allows you to define the derivation and pricing parameters, such as source system, parameter 1, parameter 2, parameter 3, and parameter 4 for the bill group. These parameters are used to derive the bill group against which the billable charges created for the claim, enrollment, and ancillary transactions should be billed in the system. The derived bill group is also used for billing the claim based fees, one-time or recurring fees, specific stop-loss credits, and aggregate stop-loss credits. You can define multiple derivation and pricing parameters for a bill group, but the derivation and pricing parameter combination must be unique for a particular duration.

For example, if you want bill group 1 to handle the claim, enrollment, and ancillary transactions of employees:

- Who reside in the Western location of the city
- Who belong to Grade A
- Whose transactions are received from the X system

Then, you need to define the following derivation and pricing parameters for bill group 1:

Bill Group Name	Sort ID	Source System	Parameter 1	Parameter 2	Parameter 3	Parameter 4
Bill Group 1	111	X	Western	Grade A	-	-

Example 1: Derivation and Pricing Parameters for Bill Group 1

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Similarly, if you want bill group 2 to handle the claim, enrollment, and ancillary transactions of employees:

- Who reside in the Eastern location of Mumbai
- Who are the person of Indian origin
- Who belong to Grade A
- Whose transactions are received from the X system

Then, you need to define the following derivation and pricing parameters for bill group 2:

Bill Group Name	Sort ID	Source System	Parameter 1	Parameter 2	Parameter 3	Parameter 4
Bill Group 2	123	X	Eastern	Grade A	Mumbai	India

Example 2: Derivation and Pricing Parameters for Bill Group 2

In the example 1 and 2, the bill group is derived based on the specified employee attributes when the source system, parameter 1, parameter 2, parameter 3, and parameter 4 are mapped to the appropriate transaction fields in the primary pricing rule type using which the pricing rules are defined for the bill group. For example,

Pricing Rule Type	Source System	Parameter 1	Parameter 2	Parameter 3	Parameter 4
PR1	External System	Location	Designation	City	Country

Example 3: Transaction Field Mapping in Primary Pricing Rule Type

You can also define criteria for a rule in a pricing group using the parameters, such as source system, parameter 1, parameter 2, parameter 3, and parameter 4.

For example, the following table illustrates how you can define a rule criteria in a pricing group:

Pricing Group	Rule	Source System	Parameter 1	Parameter 2	Parameter 3	Parameter 4
PG1	R1	X	Eastern	Grade A	Mumbai	India
	R2	X	Western	Grade A	-	-

Example 4: Rules Defined in a Pricing Group

If a pricing rule is defined for a bill group using a pricing group, you can define more than one price in the pricing rule which is offered based on the attributes of the employees.

For example, the following table illustrates how you can use a pricing group to derive a pricing strategy in a pricing rule:

Pricing Rule	Pricing Group	Rule	Rule Criteria	Pricing Strategy	Markup or Markdown Type	Markup or Markdown Amount
PRRR1	PG1	R1	Source System = X, Parameter 1 = Eastern, Parameter 2 = Grade A, Parameter 3 = Mumbai, Parameter 4 = India	Markup	Flat Amount	$20
		R2	Source System = X, Parameter 1 = Western, Parameter 2 = Grade A	Markdown	Flat Amount	$10

Example 5: Defining a Pricing Rule Using a Pricing Group

In the example 5, the system will use the markup strategy on the claim line items for the employees who satisfy the criteria specified in R1. On the other hand, the system will use the markdown strategy on the claim line items for the employees who satisfy the criteria specified in R2.

The derivation and pricing parameters for the bill group and sort ID combination are effective from a particular date. However, the effective date must fall within the date range defined for the sort ID of the bill group. The source system and parameter 1 are mandatory while defining the derivation and pricing parameters for a bill group.

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You can define and edit the derivation and pricing parameters for the bill group and sort ID combination from the **Customer 360° Information** screen. You can also upload the derivation and pricing parameters for one or more bill group and sort ID combinations at the same time using the **Upload Request** feature. You can upload the derivation and pricing parameters for the bill group and sort ID combinations from the **Customer 360° Information** or **Upload Request** screen. Note that you can upload the derivation and pricing parameters for the bill group and sort ID only using the CSV file format.

Related Topics

For more information on...	See...
Bill Group Derivation and Pricing Parameters zone	Bill Group Derivation and Pricing Parameters on page 616
How to define the derivation and pricing parameters for a bill group and sort ID combination	Defining the Derivation and Pricing Parameters for a Bill Group and Sort ID Combination on page 663
How to edit the derivation and pricing parameters of a bill group and sort ID combination	Editing the Derivation and Pricing Parameters of a Bill Group and Sort ID Combination on page 665
How to create an upload request for the derivation and pricing parameters from the **Bill Group Derivation and Pricing Parameters** zone	Creating a Bill Group Derivation and Pricing Parameters Upload Request on page 667
How to create an upload request for the derivation and pricing parameters from the **Upload Request** screen	Creating an Upload Request on page 2168

Related Pricing Rule Type Eligibility

Oracle Revenue Management and Billing enables you to define eligibility rule type for a related pricing rule type in a primary pricing rule type. If the eligibility rule type is defined of a related pricing rule type, the system checks whether the related pricing rule type is eligible for deriving the transaction legs when it is called during the **Validate Transaction and Derive Price Item (C1-TXNIP)** batch execution. The system searches for all rules which are created using the respective rule type and then executes them one by one in the specified priority until the following conditions are met in a rule:

- The eligibility criteria defined in the rule is satisfied.
- The satisfied rule returns the output parameter and its value as specified in the **Rule Based Related Pricing Rule Type Eligibility Field** and **Rule Based Eligibility Value** fields, respectively, of the primary pricing rule type.
- The **Rule True Action** field in the satisfied rule returns **Success**.

Note: At present, the system considers all rules created using the respective rule type irrespective of whether it is effective on the transaction date or not.

If all the above conditions are met in a rule, the system calls the respective related pricing rule type for deriving the transaction legs. If none of the rules created using the rule type are satisfied, the system does not call the respective related pricing rule type for deriving the transaction legs. Let us understand this with the help of an example. If the claim transaction is received with the following details:

- UDF_CHAR_1 is set to Western
- UDF_CHAR_15 is set Employee
- UDF_DATE_1 is set to 11-05-2018
- Transaction Record Type is set to TR1

The following table illustrates how the eligibility rules can be defined for a related pricing rule type:

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Transaction Record Type	Primary Pricing Rule Type	Related Pricing Rule Type	Eligibility Rule Type	Rule	Rule's Effective Start Date	Rule's Effective End Date	Priority	Rule Criteria	Output Parameter	Output Parameter Value
TR1	CLAIM	CLAIM BASED FEES	RT1	R1	01-01-2018	31-03-2018	1	UDF_CHAR_1 = Western	UDF_CHAR_15	Director
				R2	01-01-2018	31-03-2018	2	UDF_CHAR_1 = Western	UDF_CHAR_15	Employee
				R3	01-04-2018	30-06-2018	3	UDF_CHAR_1 = Western	UDF_CHAR_15	Employee
				R4	01-07-2018	31-12-2018	4	UDF_CHAR_1 = Western	UDF_CHAR_15	Director
		SPECIFIC STOP-LOSS	RT2	R5	01-01-2018	31-03-2018	1	UDF_CHAR_1 = Western	UDF_CHAR_15	Director
				R6	01-01-2018	31-03-2018	2	UDF_CHAR_1 = Eastern	UDF_CHAR_15	Employee
				R7	01-04-2018	31-12-2018	3	UDF_CHAR_1 = Western	UDF_CHAR_15	Employee
		AGGREGATE STOP-LOSS	RT3	R8	01-04-2018	31-12-2018	1	UDF_CHAR_1 = Eastern	UDF_CHAR_15	Employee
				R9	01-04-2018	31-12-2018	2	UDF_CHAR_1 = Western	UDF_CHAR_15	Director

Note: Here, the paid date is mapped to the **UDF_DATE_1** field in the CLAIM pricing rule type. In addition, the **Rule Based Related Pricing Rule Type Eligibility Field** field is set to **UDF_CHAR_15** and the **Rule Based Eligibility Value** field is set to **Employee** in the CLAIM pricing rule type.

Example 1: Related Pricing Rule Type Eligibility Rules

In the example 1, the rules which are created using the RT1 rule type are invoked for the CLAIM BASED FEES pricing rule type in the specified priority. The claim transaction meets the eligibility criteria defined in the R1 rule. But, the output parameter's value specified in the R1 rule does not match the value specified in the **Rule Based Eligibility Value** field. Therefore, the system executes the rule with the next priority (i.e. R2). The claim transaction meets the eligibility criteria defined in the R2 rule. In addition, the output parameter and its value specified in the R2 rule match the values specified in the **Rule Based Related Pricing Rule Type Eligibility Field** and **Rule Based Eligibility Value** fields, respectively. Therefore, the system considers the CLAIM BASED FEES pricing rule type for deriving the transaction legs.

The rules which are created using the RT2 rule type are invoked for the SPECIFIC STOP-LOSS pricing rule type in the specified priority. The claim transaction meets the eligibility criteria defined in the R5 rule. But, the output parameter's value specified in the R5 rule does not match the value specified in the **Rule Based Eligibility Value** field. Therefore, the system executes the rule with the next priority (i.e. R6). Here, the claim transaction does not meet the eligibility criteria defined in the R6 rule. The system then executes the rule with the next priority (i.e. R7). The claim transaction meets the eligibility criteria defined in the R7 rule. In addition, the output parameter and its value specified in the R7 rule match the values specified in the **Rule Based Related Pricing Rule Type Eligibility Field** and **Rule Based Eligibility Value** fields, respectively. Therefore, the system considers the SPECIFIC STOP-LOSS pricing rule type for deriving the transaction legs.

Similarly, the rules which are created using the RT3 rule type are invoked for the AGGREGATE STOP-LOSS pricing rule type in the specified priority. The claim transaction does not meet the eligibility criteria defined in the R8 rule. Therefore, the system executes the rule with the next priority (i.e. R9). The claim transaction meets the eligibility criteria defined in the R9 rule. But, the output parameter's value specified in the R9 rule does not match the value specified in the **Rule Based Eligibility Value** field. As none of the rules created using the rule type met the criteria, the system does not consider the AGGREGATE STOP-LOSS pricing rule type for deriving the transaction legs.

Price Item Eligibility

Oracle Revenue Management and Billing enables you to define eligibility rule type for a price item in a pricing rule type. If the eligibility rule type is defined of a price item, the system checks whether the price item is eligible for billing when the pricing rule type is called during the **Validate Transaction and Derive Price Item (C1-TXNIP)** batch execution.

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The system searches for all rules which are created using the respective rule type and then executes them one by one in the specified priority until the following conditions are met in a rule:

- The eligibility criteria defined in the rule is satisfied.
- The satisfied rule returns the output parameter and its value as specified in the **Rule Based Price Item Eligibility Field** and **Rule Based Eligibility Value** fields, respectively, of the pricing rule type.
- The **Rule True Action** field in the satisfied rule returns **Success**.

Note: At present, the system considers all rules created using the respective rule type irrespective of whether it is effective on the transaction date or not.

If all the above conditions are met, the system searches for an effective pricing rule for the respective price item. If none of the rules created using the rule type are satisfied, the system does not map the transaction to the price item. Let us understand this with the help of an example. If the claim transaction is received with the following details:

- UDF_CHAR_1 is set to Western
- UDF_CHAR_20 is set to Employee
- UDF_DATE_1 is set to 05-03-2018
- Transaction Record Type is set to TR1

The following table illustrates how the eligibility rules can be defined for a price item in a pricing rule type:

Transaction Record Type	Primary Pricing Rule Type	Price Item	Eligibility Rule Type	Rule	Rule's Effective Start Date	Rule's Effective End Date	Priority	Rule Criteria	Output Parameter	Output Parameter Value
TR1	CLAIM	P1	RT1	R1	01-01-2018	31-03-2018	1	UDF_CHAR_1 = Western	UDF_CHAR_20	Director
				R2	01-01-2018	31-03-2018	2	UDF_CHAR_1 = Western	UDF_CHAR_20	Employee
				R3	01-04-2018	30-06-2018	3	UDF_CHAR_1 = Western	UDF_CHAR_20	Employee
				R4	01-07-2018	31-12-2018	4	UDF_CHAR_1 = Western	UDF_CHAR_20	Director
		P2	RT2	R5	01-01-2018	31-03-2018	1	UDF_CHAR_1 = Western	UDF_CHAR_20	Director
				R6	01-01-2018	31-03-2018	2	UDF_CHAR_1 = Eastern	UDF_CHAR_20	Employee
				R7	01-04-2018	31-12-2018	3	UDF_CHAR_1 = Western	UDF_CHAR_20	Employee

Note: Here, the paid date is mapped to the **UDF_DATE_1** field in the CLAIM pricing rule type. In addition, the **Rule Based Related Pricing Rule Type Eligibility Field** field is set to **UDF_CHAR_20** and the **Rule Based Eligibility Value** field is set to **Employee** in the CLAIM pricing rule type.

Example 1: Price Item Eligibility Rules

In the example 1, the rules which are created using the RT1 rule type are invoked for P1 in the specified priority. The claim transaction meets the eligibility criteria defined in the R1 rule. But, the output parameter's value specified in the R1 rule does not match the value specified in the **Rule Based Eligibility Value** field. Therefore, the system executes the rule with the next priority (i.e. R2). The claim transaction meets the eligibility criteria defined in the R2 rule. In addition, the output parameter and its value specified in the R2 rule match the values specified in the **Rule Based Price Item Eligibility Field** and **Rule Based Eligibility Value** fields, respectively. Therefore, the system considers P1 for billing and maps the claim transaction to P1 if an effective pricing rule, account, and active contract are available for P1.

Similarly, the rules which are created using the RT2 rule type are invoked for P2 in the specified priority. The claim transaction meets the eligibility criteria defined in the R5 rule. But, the output parameter's value specified in the R5 rule does not match the value specified in the **Rule Based Eligibility Value** field. Therefore, the system executes the rule with the next priority (i.e. R6). Here, the claim transaction does not meet the eligibility criteria defined in the R6 rule. The system then executes the rule with the next priority (i.e. R7). The claim transaction meets the eligibility criteria defined in the R7 rule. In addition, the output parameter and its value specified in the R7 rule match the values specified in the **Rule Based Price Item Eligibility Field** and **Rule Based Eligibility Value** fields, respectively. Therefore, the

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system considers P2 for billing and maps the claim transaction to P2 if an effective pricing rule, account, and active contract are available for P2.

Self-Funded Billing Process

The **Self-Funded Billing** process consists of the following sub-processes:

- Transaction Aggregation on page 3317
- Stop Loss Calculation on page 3322
- Bill Generation on page 3322

Transaction Aggregation

Once the claim, enrollment, and ancillary transactions are uploaded, you can create billable charges for the following using the **Transaction Aggregation** process in the **Transaction Feed Management (TFM)** module:

- Claim
- Claim Based Fees
- Retroactive Enrollment Fees
- Non-retroactive Enrollment Fees
- Ancillary

The transaction calculation lines for specific stop-loss and aggregate stop-loss are created during the **Transaction Aggregation** process. Earlier, the **Transaction Aggregation** process was designed to meet the requirements of the **Payments** and **Financial Services** industries. Now, in addition, it is tuned slightly to meet the requirements of the self-funded health insurance business. The changes are made in the following batches which are executed in the **Transaction Aggregation** process:

- **Validate Transaction and Derive Price Item (C1-TXNIP)** - During this batch execution, the system validates the transaction. If the transaction validation fails due to any reason, the status of the transaction is changed to **Error**. If the transaction validation is successful, the system checks whether a primary pricing rule type is specified in the respective transaction record type. If a primary pricing rule type is not specified in the transaction record type, the system maps the transaction to one or more price item, price item parameters, and account combinations using the rules which are invoked through the rule type. However, if a primary pricing rule type is specified in the transaction record type, the system calls the primary pricing rule type and invokes the algorithms which are attached to the following system events of the primary pricing rule type in the specified sequence:

  1. **Transaction Validation** - At present, the product has not shipped an algorithm type for the **Transaction Validation** system event. If required, you can create a custom algorithm type which validates the transaction before deriving the transaction legs.
  2. **Bill Group Derivation** - For more information, refer to the Bill Group Derivation on page 3323 section.
  3. **Account and Price Item Derivation** - Depending on the category to which the pricing rule type belongs, you need to attach different algorithm to the **Account and Price Item Derivation** system event. The following table lists the algorithms that you can attach to a primary pricing rule types with different category:

Pricing Rule Type Category	Algorithm	For more information on how the system derives the transaction legs, refer to...
Claim	C1_ACCPRIDRV	Account and Price Item Derivation (for the Claim Pricing Rule Type Category) on page 3325
Retention Type Enrollment Based	C1_ACCPRIDRV	Account and Price Item Derivation (for the Retention Type Enrollment Based Pricing Rule Type Category) on page 3348

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Pricing Rule Type Category	Algorithm	For more information on how the system derives the transaction legs, refer to...
Ancillary	C1_ACCPRIDRV	Account and Price Item Derivation (for the Ancillary Pricing Rule Type Category) on page 3356

This batch then calls the eligible related pricing rule types (if any) defined in the primary pricing rule type. Note that the related pricing rule types are called one by one in the specified sequence. The system invokes the algorithms which are attached to the following system events of the related pricing rule type in the specified sequence:

1. **Transaction Validation** - At present, the product has not shipped an algorithm type for the **Transaction Validation** system event. If required, you can create a custom algorithm type which validates the transaction before deriving the transaction legs.
2. **Account and Price Item Derivation** - Depending on the category to which the pricing rule type belongs, you need to attach different algorithm to the **Account and Price Item Derivation** system event. The following table lists the algorithms that you can attach to a related pricing rule type with different category:

Pricing Rule Type Category	Algorithm	For more information on how the system derives the transaction legs, refer to...
Specific Stop-Loss	C1_ACCPRISL	Account and Price Item Derivation (for the Specific Stop-Loss and Aggregate Stop-Loss Pricing Rule Type Categories) on page 3330
Aggregate Stop-Loss	C1_ACCPRISL	Account and Price Item Derivation (for the Specific Stop-Loss and Aggregate Stop-Loss Pricing Rule Type Categories) on page 3330
Retention Type Claim Based	C1_ACCPRIDRV	Account and Price Item Derivation (for the Retention Type Claim Based Pricing Rule Type Category) on page 3339

The following figure graphically explains the execution process of the **Validate Transaction and Derive Price Item (C1-TXNIP)** batch:

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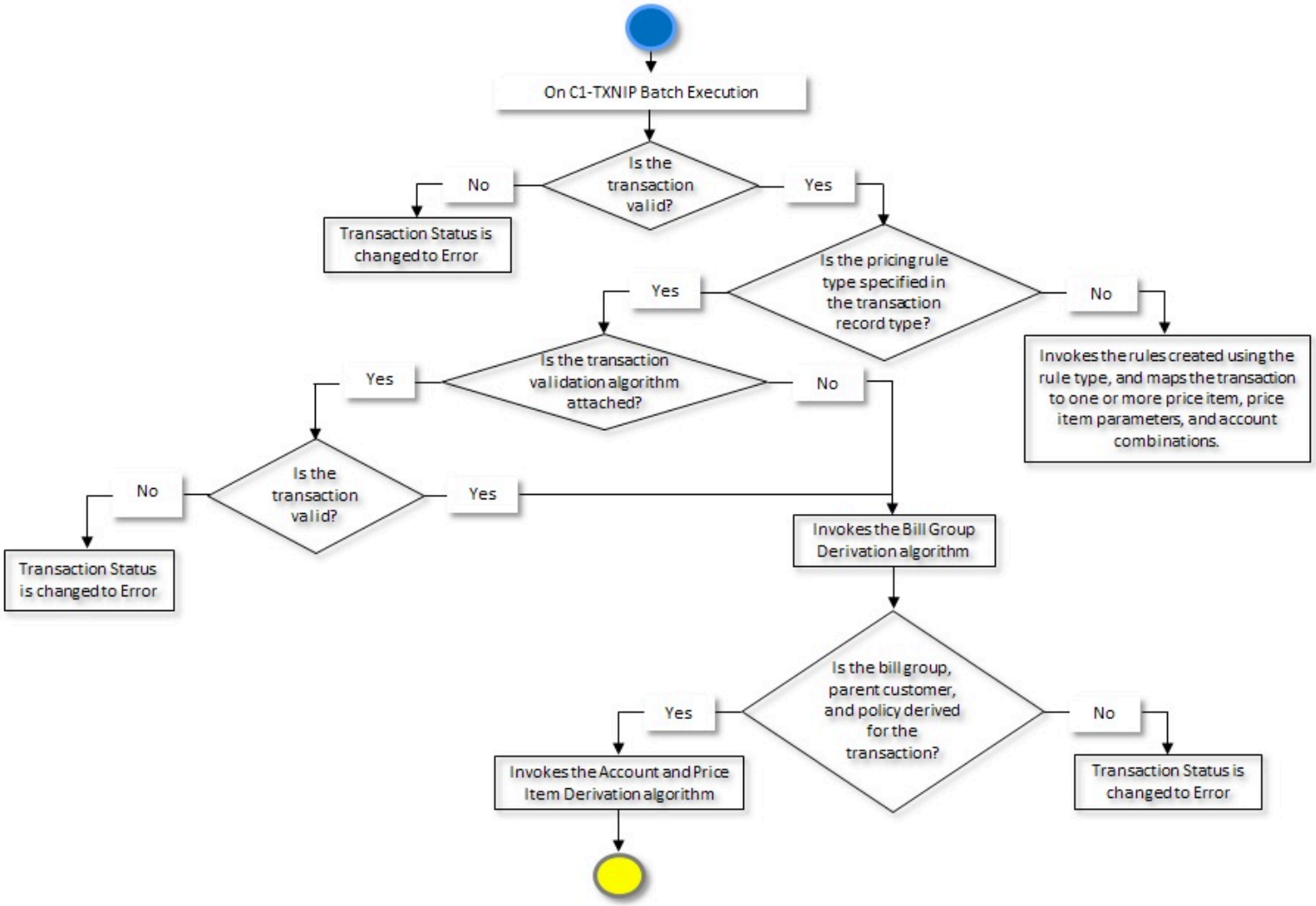

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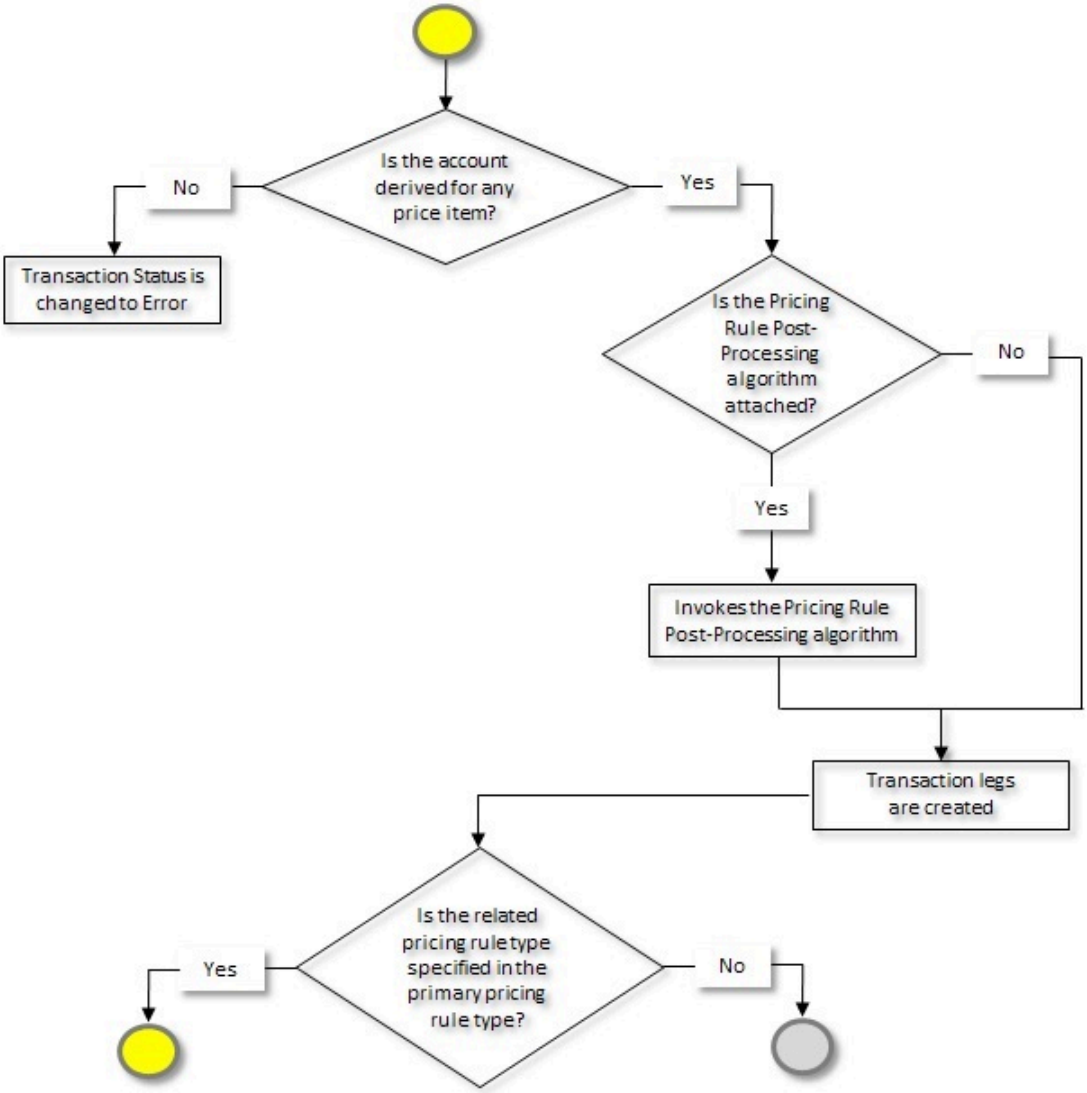

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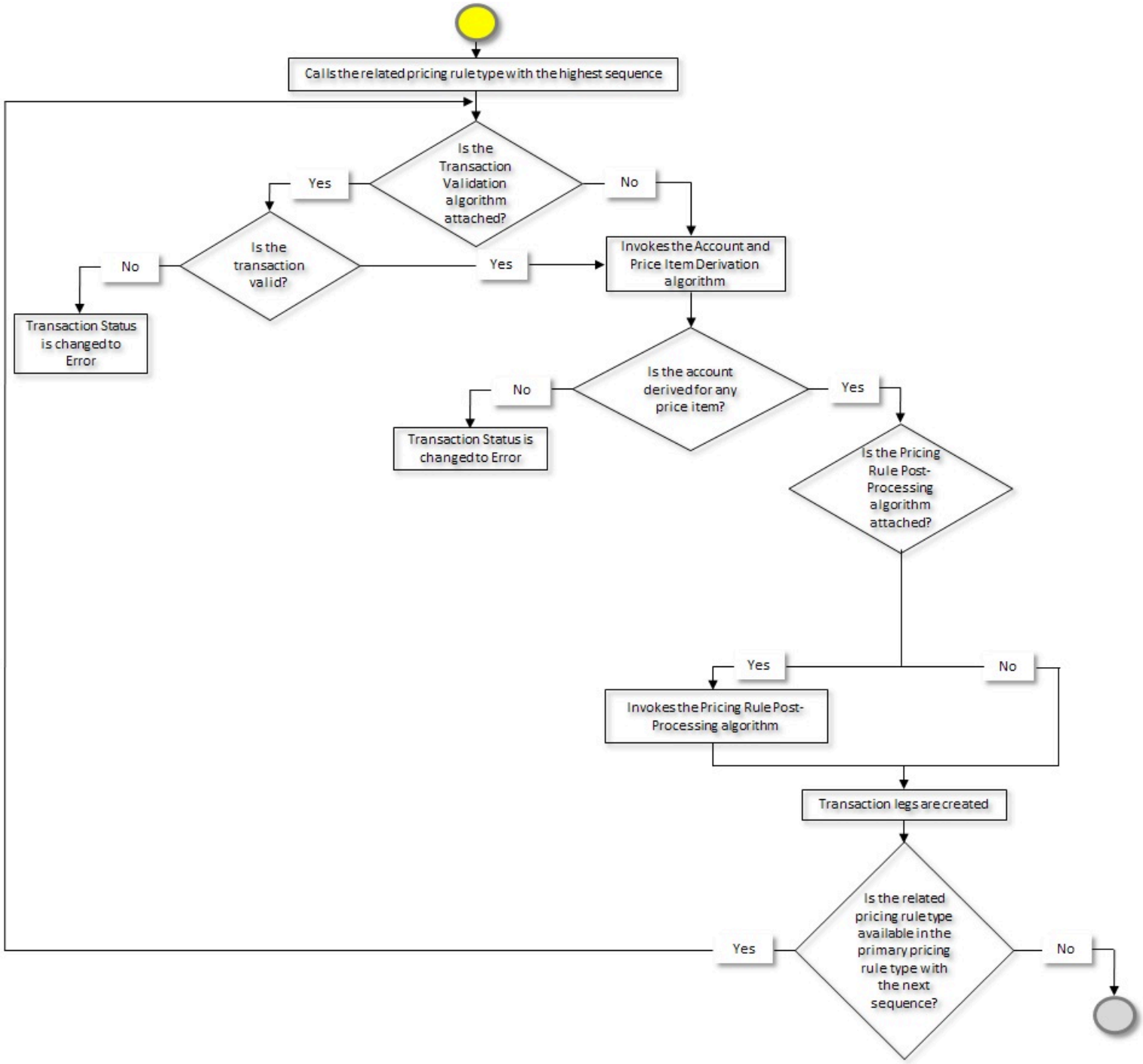

- **Price Item Pricing Verification (C1-TXNVP)** - During this batch execution, the system derives an effective pricing for each transaction leg on the processing date. For more information, refer to the Price Item Pricing Verification on page 1152 section. In addition, the system invokes the algorithms attached to the following algorithm spots of the derived account's division in the specified sequence for the self-funded health insurance business:

  1. **TFM - Contract Derivation** - You can attach an algorithm created using the **SA_DERV_POPC** algorithm type to this algorithm spot. If the account has multiple active contracts of the contract type which is associated with the price item, this algorithm derives the contract which is associated with the policy and maps it to the transaction leg. The manner in which the system derives the active contract for the account differs in the following scenarios:

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If the effective pricing rule stamped against the transaction leg is defined at ...	Then...
The bill group level	The system first fetches the policy derived for the transaction and then derives the active contract which is associated with the policy.
The parent customer level	The system first fetches the bill group to which the account belongs and then the policy where the bill group is associated with the policy using the policy person role which is specified in the **Bill Group Policy Person Role** option type of the **C1-ASOBLLNG** feature configuration. Once the policy is derived, the system derives the active contract which is associated with the policy.

2. **TFM - Verify Pricing Post-Processing** - You can attach an algorithm created using the **C1-VRPR_POPC** algorithm type to this algorithm spot. This algorithm removes the price assignment ID and price item parameter group ID from the summary ID column of each transaction leg.

- **Service Quantity Calculation (C1-TXNSQ)** - During this batch execution, the system aggregates the transaction legs, creates a billable charge, and updates the SQI values in the billable charge. For more information, refer to the Aggregation on page 1157 section. In addition, the system invokes the algorithm attached to the following algorithm spot of the derived account's division for the self-funded health insurance business:
  - **TFM - Billable Charge Post Processing** - You can attach an algorithm created using the **C1_BCHG_POPC** algorithm type to this algorithm spot. This algorithm invokes the algorithm which is attached to the **Bill After Date Determination** system event of the respective pricing rule type. For more information, refer to the Bill After Date Determination on page 3362 section.

Stop Loss Calculation

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

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

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

Bill Generation

Once the billable charges are created for claim, claim based fees, specific stop-loss credits, aggregate stop-loss credits, enrollment based fees, and ancillary, you need to execute the following charge-based billing batches in the specified sequence to generate bills for the self-funded employer:

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

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

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Bill Group Derivation

The **Validate Transaction and Derive Price Item (C1-TXNIP)** batch derives the bill group, parent customer, and policy for the claim, enrollment, and ancillary transactions. This is possible only when an algorithm created using the **C1_TXNBGDRV** algorithm type is attached to the **Bill Group Derivation** system event of the primary pricing rule type. The derived bill group is used for billing the following (if any):

- Claim Charges
- Claim Based Fees
- Specific Stop-Loss (SSL) Credits
- Aggregate Stop-Loss (ASL) Credits
- Retroactive Enrollment Fees
- Non-retroactive Enrollment Fees
- One-time or Recurring Fees
- Ancillary Charges

To derive a bill group, the system first determines the derivation date. The paid date is considered as the derivation date while processing the claim transactions. The coverage end date is considered as the derivation date while processing the retroactive enrollment transactions. And, the coverage start date is considered as the derivation date while processing the non-retroactive enrollment transactions. If the system cannot determine the derivation date, the status of the transaction is changed to **Error**.

Depending on the transaction fields which are mapped to source system, parameter 1, parameter 2, parameter 3, and parameter 4 in the primary pricing rule type, the system derives the data from the transaction. For example, if the source system is mapped to the **External System** field, parameter 1 is mapped to the **Location** field, parameter 2 is mapped to the **Designation** field, parameter 3 is mapped to the **Employee Group** field, and parameter 4 is mapped to the **Nationality** field, the system derives these details from the transaction. Based on the data available in the transaction, the system derives a bill group using the derivation and pricing parameters which are defined for the bill group. Note that the system considers the derivation and pricing parameters which are effective on the derivation date. For example, if the following derivation and pricing parameters are defined for the Bill Group 1 and Bill Group 2:

Bill Group Name	Sort ID	Effective Date	Source System	Parameter 1	Parameter 2	Parameter 3	Parameter 4
Bill Group 1	123	01-01-2018	X	Eastern	Senior Manager	BG1	Indian
Bill Group 1	132	01-04-2018	X	Western	Senior Manager	-	-
Bill Group 1	156	01-07-2018	Y	Eastern	Senior Manager	BG1	Indian
Bill Group 1	163	01-10-2018	Y	Western	Senior Manager	-	-
Bill Group 2	172	01-01-2018	Y	Eastern	-	-	-
Bill Group 2	181	01-04-2018	Y	Western	-	-	-
Bill Group 2	122	01-07-2018	X	Eastern	-	-	-
Bill Group 2	112	01-10-2018	X	Western	-	-	-

Now, if the system receives a claim transaction with the following details:

- External System is set to X
- Location is set to Western

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- Designation is set to Senior Manager
- Paid Date is set to 12-05-2018

In this example, the derivation and pricing parameters defined for the Bill Group 1 and 132 (sort ID) combination are effective on the paid date, and therefore the system derives Bill Group 1 for billing the claim transaction. Let us take another example where the system receives a retroactive enrollment transaction with the following details:

- External System is set to X
- Location is set to Eastern
- Designation is set to Senior Manager
- Employee Group is set to BG1
- Nationality is set to Indian
- Coverage Start Date is set to 01-01-2018
- Coverage End Date is set to 31-03-2018

In this example, the derivation and pricing parameters defined for the Bill Group 1 and 123 (sort ID) combination are effective on the coverage end date, and therefore the system derives Bill Group 1 for billing the retroactive enrollment transaction.

In the above two examples, the system could find the exact match for the bill group in the system. However, if the exact match is not available, the system finds the bill group using the best fit match. For example, if the system receives a claim transaction with the following details:

- External System is set to Y
- Location is set to Western
- Designation is set to Senior Manager
- Employee Group is set to BG2
- Nationality is set to Indian
- Paid Date is set to 01-06-2018

In this example, the system could not find the effective derivation and pricing parameters with exact match (i.e. Source System = Y, Location = Western, Designation = Senior Manager, Employee Group = BG2, and Nationality = Indian) on the paid date. Therefore, it searches for the best fit match.

While searching for the best fit match, the system first rules out the optional parameter 4 (i.e. Nationality = Indian) and then checks whether the effective derivation and pricing parameters, where Source System = Y, Location = Western, Designation = Senior Manager, and Employee Group = BG2, are available on the paid date. If so, it considers the derivation and pricing parameters and accordingly derives the bill group. If not, the system then rules out the optional parameter 3 (i.e. Employee Group = BG2) and then checks whether the effective derivation and pricing parameters, where Source System = Y, Location = Western, and Designation = Senior Manager, are available on the paid date. If so, it considers the derivation and pricing parameters and accordingly derives the bill group. If not, the system then rules out the optional parameter 2 (i.e. Designation = Senior Manager) and then checks whether the effective derivation and pricing parameters, where Source System = Y and Location = Western, are available on the paid date. If so, it considers the derivation and pricing parameters and accordingly derives the bill group. If not, the status of the transaction is changed to **Error**.

In this example, the derivation and pricing parameters, where Source System = Y and Location = Western, defined for the Bill Group 2 and 181 (sort ID) combination are considered as the best fit match. Therefore, the system derives Bill Group 2 for billing the claim transaction. Let us take another example where the system receives a non-retroactive enrollment transaction with the following details:

- External System is set to Y
- Location is set to Eastern
- Designation is set to Senior Manager
- Employee Group is set to BG1
- Nationality is set to Indian
- Coverage Start Date is set to 01-01-2018
- Coverage End Date is set to 31-03-2018

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In this example, the system could not find the effective derivation and pricing parameters with exact match (i.e. Source System = Y, Location = Eastern, Designation = Senior Manager, Employee Group = BG1, and Nationality = Indian) on the coverage start date. Therefore, it searches for the best fit match. The derivation and pricing parameters, where Source System = Y and Location = Eastern, defined for the Bill Group 2 and 172 (sort ID) combination are considered as the best fit match. Therefore, the system derives Bill Group 2 for billing the non-retroactive enrollment transaction.

Once the bill group is derived, the system derives the parent customer of the bill group. Once the parent customer is derived, the system derives the policy for the transaction in the following manner:

If the transaction is a...	**Then...**

Claim Transaction	The system checks whether the paid date of the claim transaction falls within the policy start date and runout end date of any policy where:
	• The bill group is associated with the policy using the policy person role which is specified in the **Bill Group Policy Person Role** option type of the **C1-ASOBLLNG** feature configuration.
	• The status of the policy is set to either of the following:
	  • In Force/Active
	  • Runout
	  • Post Runout

Retroactive Enrollment Transaction	The system checks whether the coverage end date falls within the policy start date and policy end date of any policy where: • The bill group is associated with the policy using the policy person role which is specified in the **Bill Group Policy Person Role** option type of the **C1-ASOBLLNG** feature configuration. • The status of the policy is set to **In Force/Active**.
Non-retroactive Enrollment Transaction	The system checks whether the coverage start date falls within the policy start date and policy end date of any policy where: • The bill group is associated with the policy using the policy person role which is specified in the **Bill Group Policy Person Role** option type of the **C1-ASOBLLNG** feature configuration. • The status of the policy is set to **In Force/Active**.

If the system cannot derive the policy for the transaction, the status of the transaction is changed to **Error**.

Account and Price Item Derivation (for the Claim Pricing Rule Type Category)

The **Validate Transaction and Derive Price Item (C1-TXNIP)** batch maps a claim transaction to one or more price item and price item parameters which are defined in the respective primary pricing rule type. This is possible when an algorithm created using the **C1_ACCPRIDRV** algorithm type is attached to the **Account and Price Item Derivation** system event of the primary pricing rule type.

Note: If you have specified the price item parameters (for which the parameter usage is set to **Pricing**) in the pricing rule types where the pricing rule type category is set to **Claim**, the system does not use these price item parameters while searching for an effective pricing rule for the respective price items. However, you can use these price item parameters while defining the accumulation criteria in the related pricing rule types where the pricing rule type category is set to **Specific Stop-Loss** or **Aggregate Stop-Loss**.

This algorithm fetches the effective pricing rule for each price item specified in the primary pricing rule type on the derivation date. The system considers the paid date as the derivation date while fetching the effective pricing rules for

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the claim transactions. This algorithm first searches for the effective pricing rule for a price item which is defined for the policy at the bill group level. If the system does not find any effective pricing rule for a price item which is defined for the policy at the bill group level, it inherits the effective pricing rule for a price item from the parent customer level.

For example, if the system receives a claim transaction with the following details:

- UDF_DATE_1 is set to 15-01-2018
- Transaction Record Type is set to TR1

The following table illustrates how the pricing rules are defined for the claim transactions at different assignment levels:

Transaction Record Type	Primary Pricing Rule Type	Price Item	Pricing Rule	Pricing Start Date	Pricing End Date	Assignment Level
			C1P1	01-01-2018	31-12-2018	Parent Customer
			C2P1	01-01-2018	31-12-2018	Bill Group
			C3P1	01-01-2019	30-06-2019	Bill Group
			C1P2	01-06-2017	31-12-2017	Bill Group
			C2P2	01-01-2018	31-12-2018	Parent Customer
			C3P2	01-01-2019	30-06-2019	Bill Group

Note: Here, the paid date is mapped to the **UDF_DATE_1** field in the CLAIM pricing rule type.

Example 1: Effective Pricing Rule Derivation

In the example 1, the system fetches C2P1 and C2P2 pricing rules for P1 and P2, respectively, which are effective on the paid date. Note that the effective pricing rule for P1 is derived at the bill group level, whereas the effective pricing rule for P2 is derived from the parent customer level.

The system then derives the account with a particular invoice type (to which a price item must be billed) based on the priority which is defined for the respective price item in the pricing rule type.

For example, the following table illustrates the accounts to which the charges of P1 and P2 should be billed based on the given priority:

Price Item	Priority	Invoice Type	Account
	10	Standard	A1
	20	Retention	A2
	10	Retention	A2
	20	Standard	A1

Example 2: Priority Based Account Derivation

In the example 2, while mapping the claim transaction to P1, the system checks whether an account where the **Invoice Type (C1INVTYP)** characteristic is set to **Standard** exists for the bill group. If so, it considers the standard account (A1) of the bill group for billing. However, if an account where the **Invoice Type (C1INVTYP)** characteristic is set to **Standard** does not exist for the bill group, the system checks whether an account where the **Invoice Type (C1INVTYP)** characteristic is set to **Retention** exists for the bill group. If so, it considers the retention account (A2) of the bill group for billing. If an account where the **Invoice Type (C1INVTYP)** characteristic is set to **Retention** does not exist for the bill group, the status of the transaction is changed to **Error**.

Similarly, while mapping the claim transaction to P2, the system considers the account of the bill group which is available based on the priority. The system derives the billing account for only those price items for which the effective pricing rule is derived.

Note: The characteristic type which indicates the type of account (for example, **C1INVTYP**) must be specified in the **Invoice Type Characteristic Type** option type of the **C1-ASOBLLNG** feature configuration. Otherwise, erroneous results might occur.

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Once the account is derived, the system then checks whether the account has one active contract of the contract type which is associated with the price item. If so, it fetches the contract for further processing. Once the effective pricing rule, account, and active contract are derived, the transaction is mapped to the respective price item, price item parameters, and account. A transaction leg is created for each price item, price item parameters, and account combination. For example, if the claim transaction is mapped to the following price item and account combinations:

Price Item	Effective Pricing Rule	Account	Active Contract	Transaction Leg
P1	PR1	A1	C1	TL1
P2	PR2	A2	C2	TL2
P3	PR3	A3	C3	TL3

Example 3: Transaction Leg Derivation

In the example 3, the system creates three transaction legs - TL1, TL2, and TL3 for the transaction. Once a transaction leg is created, the respective effective pricing rule is stamped against the transaction leg. Usually, once a transaction leg is created in the **Validate Transaction and Derive Price Item (C1-TXNIP)** batch, the price item parameters (for which the parameter usage is set to **Pricing**) of the transaction leg are grouped. The system does not support multiple parameter based pricing for the pricing rule types where the pricing rule type category is set to **Claim**. Therefore, when the price item parameters are not specified, the price item parameter group ID is set to 1 corresponding to each transaction leg - TL1, TL2, and TL3.

Note: A price item parameter group is used to determine the price item pricing. A unique group ID is generated for each group. If a group with a set of price item parameters already exists in the system, a new group is not created. Instead, the existing group is used for determining the price item pricing.

If a pricing group is used while defining a pricing rule for a bill group, the system fetches the pricing rule for a claim transaction when the following conditions are met:

- The paid date of the claim transaction falls within the pricing rule's date range.
- The employee attributes specified in the claim transaction match the criteria defined in any one of the pricing group rule.

Let us understand this with the help of an example. A claim transaction is received with the following details:

- UDF_CHAR_1 is set to X
- UDF_CHAR_2 is set to Western
- UDF_CHAR_3 is set to Indian
- UDF_CHAR_4 is set to HR
- UDF_CHAR_5 is set to Permanent
- UDF_DATE_1 is set to 04-06-2018
- Transaction Record Type is set to TR1

For example, the following table illustrates an effective pricing rule which is defined using a claim pricing rule type and where a pricing group is used:

Transaction Record Type	Primary Pricing Rule Type	Price Item	Pricing Rule	Pricing Start Date	Pricing End Date	Pricing Group	Rule 1	Rule 2
TR1	CLAIM	PP1	PR1	01-01-2018	31-12-2018	PG1	Source System = X, Parameter 1 = Western, Parameter 2 = Indian, Parameter 3 = HR, and Parameter 4 = Permanent	Source System = X, Parameter 1 = Eastern, and Parameter 2 = Indian, Parameter 3 = HR, and Parameter 4 = Permanent

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Note: Here, the source system is mapped to the **UDF_CHAR_1** field, the parameter 1 is mapped to the **UDF_CHAR_2** field, the parameter 2 is mapped to the **UDF_CHAR_3** field, the parameter 3 is mapped to the **UDF_CHAR_4** field, the parameter 4 is mapped to the **UDF_CHAR_5** field, and the paid date is mapped to the **UDF_DATE_1** field in the CLAIM pricing rule type.

Example 4: Effective Pricing Rule is Defined Using a Pricing Group

In the example 4, the system considers the PR1 pricing rule for PP1 because of the following reasons:

- The paid date (i.e. 04-06-2018) of the claim transaction falls within the PR1 pricing rule's date range (i.e. 01-01-2018 to 31-12-2018).
- The employee attributes specified in the claim transaction match the criteria defined in the Rule 1 (i.e. Source System = X, Location = Western, Nationality = Indian, Employee Department = HR, and Employee Status = Permanent)

The system then stores the pricing group rule which is satisfied against a parameter which is defined in the **Pricing Group Rule Parameter** option type of the **C1-ASOBLLNG** feature configuration. In the example 4, the price item parameter group is created and it contains the pricing group rule parameter. For example, Group A contains Pricing Group Rule Parameter = Rule 1.

In the example 4, the system could find the exact match for pricing parameters defined in the pricing group rule. However, if the exact match is not available, the system finds the effective pricing rule using the best fit match for the pricing parameters defined in the pricing group rule. Note that the system searches for the exact match in the effective pricing rules at both the bill group and parent customer levels. If the exact match is not available at both the levels, the system finds the effective pricing rule using the best fit match for the pricing parameters (defined in the pricing group rule) first at the bill group level and then at the parent customer level.

Let us understand this with the help of an example. A claim transaction is received with the following details:

- UDF_CHAR_1 is set to X
- UDF_CHAR_2 is set to Western
- UDF_CHAR_3 is set to Indian
- UDF_CHAR_4 is set to HR
- UDF_CHAR_5 is set to Permanent
- UDF_DATE_1 is set to 04-06-2018
- Transaction Record Type is set to TR2

For example, the following table illustrates the effective pricing rules which are available during the best fit match:

Transaction Record Type	Primary Pricing Rule Type	Price Item	Pricing Rule	Pricing Start Date	Pricing End Date	Pricing Group	Rule 1	Rule 2
TR2	CLM	PP1	PR1	01-01-2018	31-12-2018	PG1	Source System = X and Parameter 1 = Western	Source System = X and Parameter 1 = Eastern
		PP2	PR2	01-01-2018	31-12-2018	PG2	Source System = X, Parameter 1 = Eastern, Parameter 2 = Indian, Parameter 3 = HR, and Parameter 4 = Permanent	Source System = X, Parameter 1 = Western, Parameter 2 = Indian, Parameter 3 = HR, and Parameter 4 = Permanent

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Note: Here, the source system is mapped to the **UDF_CHAR_1** field, the parameter 1 is mapped to the **UDF_CHAR_2** field, the parameter 2 is mapped to the **UDF_CHAR_3** field, the parameter 3 is mapped to the **UDF_CHAR_4** field, the parameter 4 is mapped to the **UDF_CHAR_5** field, and the paid date is mapped to the **UDF_DATE_1** field in the CLM pricing rule type.

Example 5: Effective Pricing Rule Derivation Using Best Fit Match for Pricing Parameters

In the example 5, the system could not find the exact match for the pricing parameters (i.e. Source System = X, Parameter 1 = Western, Parameter 2 = Indian, Parameter 3 = HR, and Parameter 4 = Permanent) in the effective pricing rule for PP1. Therefore, the system searches for the best fit match. While searching for the best fit match, the system rules out the optional parameter 4 (i.e. Parameter 4 = Permanent) and then checks whether the pricing group rule where Source System = X, Parameter 1 = Western, Parameter 2 = Indian, and Parameter 3 = HR exists in the effective pricing rule. If so, it considers PR1 as the effective pricing rule for PP1. If not, the system then rules out the optional parameter 3 (i.e. Parameter 3 = HR) and then checks whether the pricing group rule where Source System = X, Parameter 1 = Western, and Parameter 2 = Indian exists in the effective pricing rule. If so, it considers PR1 as the effective pricing rule for PP1. If not, the system then rules out the optional parameter 2 (i.e. Parameter 2 = Indian) and then checks whether the pricing group rule where Source System = X and Parameter 1 = Western exists in the effective pricing rule. If so, it considers PR1 as the effective pricing rule for PP1. If not, the status of the transaction is changed to **Error**.

In the example 5, the system considers Rule 1 where Source System = X and Parameter 1 = Western as the best fit match, and therefore fetches PR1 as the effective pricing rule for PP1. In addition, the system fetches PR2 as the effective pricing rule for PP2. The system creates two price item parameter groups - One contains Pricing Group Rule Parameter = Rule 1 and another contains Pricing Group Rule Parameter = Rule 2. Once the price item parameter group is created, the system creates the aggregation parameter group. An aggregation parameter group contains all price item parameters included in the pricing rule type for which the parameter usage is set to **Aggregation**.

Note: We recommend that you should only include the optional aggregation price item parameters in the pricing rule types where the pricing rule type category is set to **Claim**. Otherwise, erroneous results might occur.

If the effective pricing rule is not derived for a price item or if the account or active contract for the account is not derived, the system does not create a transaction leg for the respective price item. Let us understand this with the help of an example:

Price Item	Effective Pricing Rule	Account	Active Contract	Transaction Leg
PP1	-	-	-	-
PP2	PR2	-	-	-
PP3	PR3	A3	C3	TL1
PP4	-	-	-	-
PP5	PR5	A2	C1	TL2
PP6	PR6	A1	-	-

Example 6: No. of Transaction Legs Derived

In the example 6, the system could not find the effective pricing rule for PP1 and PP4, the required account for PP2, and the active contract for PP6 on A1. Therefore, in this case, the system creates two transaction legs - TL1 and TL2 for the claim transaction.

If the eligibility rule type is defined of a price item, the system maps the claim transaction to the price item when the eligibility rule is satisfied. If the eligibility rule is not satisfied, the system does not consider the price item for billing. For example,

Price Item	Eligibility Criteria Met	Effective Pricing Rule	Account	Active Contract	Transaction Leg
PE1	Yes	PR1	A1	C1	TL1

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Price Item	Eligibility Criteria Met	Effective Pricing Rule	Account	Active Contract	Transaction Leg
PE2	-	PR2	-	-	-
PE3	No	-	-	-	-
PE4	Yes	-	-	-	-
PE5	Yes	PR3	A2	-	-
PE6	Yes	PR4	-	-	-

Example 7: Price Item Eligibility for Transaction Leg Derivation

In the example 7, the eligibility criteria was defined for PE1, PE3, PE4, PE5, and PE6. The eligibility criteria was satisfied for PE1, PE4, PE5, and PE6, but not for PE3. Further, the system could not find the effective pricing rule for PE4, the required account for PE2 and PE6, and the active contract for PE5 on A2. Therefore, in this case, the system creates one transaction leg (i.e. TL1) for the claim transaction. For more information, refer to the Price Item Eligibility on page 3315 section.

Once a transaction leg is created, the derivation date is set as the processing date corresponding to the transaction leg.

Account and Price Item Derivation (for the Specific Stop-Loss and Aggregate Stop-Loss Pricing Rule Type Categories)

Once the **Validate Transaction and Derive Price Item (C1-TXNIP)** batch calls the primary pricing rule type specified in the transaction record type, it calls the related pricing rule types (if any) defined in the primary pricing rule type. Note that the related pricing rule types are called one by one in the specified sequence. Let us understand this with the help of an example.

The following table illustrates how related pricing rule types can be sequenced in a claim pricing rule type:

Primary Pricing Rule Type	Sequence	Related Pricing Rule Type
CLAIM	10	SPECIFIC STOP-LOSS
	20	AGGREGATE STOP-LOSS

Example 1: Related Pricing Rule Type Sequence

In the example 1, the system first calls the related pricing rule type with the highest sequence (i.e. 10) once the CLAIM pricing rule type is called. The system calls the related pricing rule type irrespective of whether the transaction legs are derived using the primary pricing rule type. Once the SPECIFIC STOP-LOSS pricing rule type is called, the system calls the related pricing rule type with the next sequence (i.e. 20). This process continues until all related pricing rule types defined in the primary pricing rule type are called one by one in the specified sequence.

If the eligibility rule type is defined for a related pricing rule type, the system considers the related pricing rule type for deriving the transaction legs when the eligibility rule is satisfied. If the eligibility rule is not satisfied, the system does not consider the related pricing rule type for deriving the transaction legs. Let us understand this with the help of an example.

The following table illustrates a claim pricing rule type where eligibility criteria is considered while deriving transaction legs for the related pricing rule types:

Primary Pricing Rule Type	Sequence	Related Pricing Rule Type	Eligibility Criteria Met
CLAIM	10	SPECIFIC STOP-LOSS	Yes
	20	AGGREGATE STOP-LOSS	No

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Example 2: Related Pricing Rule Type Eligibility Criteria

In the example 2, the eligibility criteria is defined for the SPECIFIC STOP-LOSS and AGGREGATE STOP-LOSS pricing rule types. However, the eligibility criteria for the AGGREGATE STOP-LOSS pricing rule type was not satisfied, and therefore it is not used for deriving the transaction legs.

The **Validate Transaction and Derive Price Item (C1-TXNIP)** batch maps a claim transaction to one or more price item and price item parameters which are defined in the eligible related pricing rule type. This is possible when you attach an algorithm created using the **C1_ACCPRISL** algorithm type to the **Account and Price Item Derivation** system event of the related pricing rule type.

Note: Ideally, the pricing rule types where the pricing rule type category is set to **Specific Stop-Loss** or **Aggregate Stop-Loss** should not have price item parameters for which the parameter usage is set to **Pricing**. This is because the system will not use these price item parameters while searching for an effective pricing rule for the respective price items.

This algorithm fetches an effective pricing rule for each price item specified in the related pricing rule type. It searches for an effective pricing rule for a price item at the bill group level. It derives an effective pricing rule for each price item using the incurred and paid dates specified in the claim transaction. It fetches an effective pricing rule where the following conditions are met:

- The incurred and paid dates of the claim transaction fall within the incurred and paid date ranges defined in the parent accumulation group (which is derived through the parent customer's pricing rule).
- A transaction leg is already created for at least one price item and price item parameters combination which is specified in the accumulation criteria.

For run-in claim transactions, this algorithm fetches an effective pricing rule where the following conditions are met:

- The run-in incurred and paid dates of the claim transaction fall within the run-in incurred and paid date ranges defined in the run-in accumulation group (which is derived through the parent customer's pricing rule).
- The effective pricing rule exists for at least one price item and price item parameters combination which is specified in the accumulation criteria.

For example, if the system receives a claim transaction with the following details:

- UDF_CHAR_1 is set to Western
- UDF_CHAR_2 is set to BG1
- UDF_DATE_1 is set to 18-02-2018
- UDF_DATE_2 is set to 28-02-2018
- Transaction Record Type is set to TR1

For example, the following table illustrates the pricing structure defined for various related pricing rules:

Transaction Record Type	Primary Pricing Rule Type	Related Pricing Rule Type	Price Item in Related Pricing Rule Type	Pricing Rule	Incurred Date Range in Associated Parent Customer's Pricing Rule (i.e. in Parent Accumulation Group)	Paid Date Range in Associated Parent Customer's Pricing Rule (i.e. in Parent Accumulation Group)	Accumulation Criteria
TR1	CLAIM	SPECIFIC STOP-LOSS	S1	C1S1	01-01-2017 - 31-12-2017	01-01-2017 - 28-02-2018	Price Item: CLAIM, Price Item Parameters: Location = Western, Employee Group = BG1
				C2S1	01-01-2018 - 31-12-2018	01-01-2018 - 28-02-2019	Price Item: CLAIM, Price Item Parameters: Location = Western, Employee Group = BG1
							Price Item: CLM, Price Item Parameters: Location = Western, Employee Group = BG1
			S2	C1S2	01-01-2017 - 31-12-2017	01-01-2017 - 28-02-2018	Price Item: CLM, Price Item

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Transaction Record Type	Primary Pricing Rule Type	Related Pricing Rule Type	Price Item in Related Pricing Rule Type	Pricing Rule	Incurred Date Range in Associated Parent Customer's Pricing Rule (i.e. in Parent Accumulation Group)	Paid Date Range in Associated Parent Customer's Pricing Rule (i.e. in Parent Accumulation Group)	Accumulation Criteria
							Parameters: Location = Western, Employee Group = BG1
				C2S2	01-01-2018 - 31-12-2018	01-01-2018 - 28-02-2019	Price Item: CLM, Price Item Parameters: Location = Western, Employee Group = BG1

Note:

Price Item in Primary Pricing Rule Type: CLM; Price Item Parameters in Primary Pricing Rule Type where the Eligible for Stop-Loss option is selected: Location = UDF_CHAR_1 and Employee Group = UDF_CHAR_2.

Here, the incurred date is mapped to the **UDF_DATE_1** field and the paid date is mapped to the **UDF_DATE_2** field in the CLAIM pricing rule type.

Example 3: SSL and ASL Effective Pricing Rule Derivation for Claim Transaction

In the example 3, the system fetches the C2S1 and C2S2 pricing rules for S1 and S2, respectively, because of the following reasons:

- Incurred date mentioned in the claim transaction falls within the incurred date range (i.e. 01-01-2018 - 31-12-2018) defined in the parent accumulation group.
- Paid date mentioned in the claim transaction falls within the paid date range (i.e. 01-01-2018 - 28-02-2019) defined in the parent accumulation group.
- A transaction leg already exists for the following price item and price item parameters combination which is specified in the accumulation criteria of the C2S1 and C2S2 pricing rules:
    - Price Item: CLM, Price Item Parameters: Location = Western and Employee Group = BG1

Let us take another example where the system receives a run-in claim transaction with the following details:

- UDF_CHAR_1 is set to Eastern
- UDF_CHAR_3 is set to Active
- UDF_DATE_3 is set to 18-06-2017
- UDF_DATE_4 is set to 01-07-2017
- Transaction Record Type is set to TR2

For example, the following table illustrates the pricing structure defined for various related pricing rules:

Transaction Record Type	Primary Pricing Rule Type	Related Pricing Rule Type	Price Item in Related Pricing Rule Type	Pricing Rule	Run-in Incurred Date Range in Associated Parent Customer's Pricing Rule (i.e. in Run-in Accumulation Group)	Run-in Paid Date Range in Associated Parent Customer's Pricing Rule (i.e. in Run-in Accumulation Group)	Accumulation Criteria
TR2	CLAIM	AGGREGATE STOP-LOSS	AS1	C1AS1	01-01-2017 - 31-12-2017	01-01-2017 - 28-02-2018	Price Item: CLAIM, Price Item Parameters: Location = Eastern, Employee Status = Active
				C2AS1	01-01-2018 - 31-12-2018	01-01-2018 - 28-02-2019	Price Item: CLAIM, Price Item Parameters: Location = Eastern, Employee Status = Active
							Price Item: CLM, Price Item Parameters: Location = Eastern,

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Transaction Record Type	Primary Pricing Rule Type	Related Pricing Rule Type	Price Item in Related Pricing Rule Type	Pricing Rule	Run-in Incurred Date Range in Associated Parent Customer's Pricing Rule (i.e. in Run-in Accumulation Group)	Run-in Paid Date Range in Associated Parent Customer's Pricing Rule	Accumulation Criteria
							Employee Status = Active
			AS2	C1AS2	01-01-2017 - 31-12-2017	01-01-2017 - 28-02-2018	Price Item: CLM, Price Item Parameters: Location = Eastern, Employee Status = Active
				C2AS2	01-01-2018 - 31-12-2018	01-01-2018 - 28-02-2019	Price Item: CLM, Price Item Parameters: Location = Eastern, Employee Status = Active

Note:

Price Items in Primary Pricing Rule Type: CLAIM and CLM; Price Item Parameters in Primary Pricing Rule Type where the Eligible for Stop-Loss option is selected: Location = UDF_CHAR_1 and Employee Status = UDF_CHAR_3.

Here, the run-in incurred date is mapped to the **UDF_DATE_3** field and the run-in paid date is mapped to the **UDF_DATE_4** field in the CLAIM pricing rule type.

Example 4: SSL and ASL Effective Pricing Rule Derivation for Run-in Claim Transaction

In the example 4, the system fetches the C1AS1 and C1AS2 pricing rules for AS1 and AS2, respectively, because of the following reasons:

- Run-in incurred date mentioned in the claim transaction falls within the run-in incurred date range (i.e. 01-01-2017 - 31-12-2017) defined in the run-in accumulation group.
- Run-in paid date mentioned in the claim transaction falls within the run-in paid date range (i.e. 01-01-2017 - 28-02-2018) defined in the run-in accumulation group.
- An effective pricing rule exists for the following price item and price item parameters combination which is specified in the accumulation criteria of the C1AS1 and C1AS2 pricing rules:
  - Price Item: CLAIM, Price Item Parameters: Location = Eastern, Employee Status = Active
  - Price Item: CLM, Price Item Parameters: Location = Eastern, Employee Status = Active

The system then checks whether the ASSL Credit Account (in case of specific stop-loss pricing rule) and ASL Credit Account (in case of aggregate stop-loss pricing rule) is specified in the associated parent customer's pricing rule. If so, the system considers the respective account for billing. Otherwise, the system derives the account with a particular invoice type (to which a price item must be billed) based on the priority which is defined for the respective price item in the related pricing rule type.

For example, the following table illustrates the accounts to which the charges of S1 and S2 should be billed based on the given priority:

Related Pricing Rule Type	Price Item	Priority	Invoice Type	Account
SPECIFIC STOP-LOSS	S1	10	Standard	A1
		20	Retention	A2
	S2	10	Retention	A2
		20	Standard	A1

Example 5: Priority Based Account Derivation

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In the example 5, while mapping the claim transaction to S1, the system checks whether an account where the **Invoice Type (C1INVTYP)** characteristic is set to **Standard** exists for the bill group. If so, it considers the standard account (A1) of the bill group for billing. However, if an account where the **Invoice Type (C1INVTYP)** characteristic is set to **Standard** does not exist for the bill group, the system checks whether an account where the **Invoice Type (C1INVTYP)** characteristic is set to **Retention** exists for the bill group. If so, it considers the retention account (A2) of the bill group for billing. If an account where the **Invoice Type (C1INVTYP)** characteristic is set to **Retention** does not exist for the bill group, the status of the transaction is changed to **Error**.

Similarly, while mapping the claim transaction to S2, the system considers the account of the bill group which is available based on the priority. The system derives the billing account for only those price items for which the effective pricing rule is derived.

Note: The characteristic type which indicates the type of account (for example, **C1INVTYP**) must be specified in the **Invoice Type Characteristic Type** option type of the **C1-ASOBLLNG** feature configuration. Otherwise, erroneous results might occur.

Once the account is derived, the system then checks whether the account has one active contract of the contract type which is associated with the price item. If so, it fetches the contract for further processing. Once the effective pricing rule, account, and active contract are derived, the transaction is mapped to the respective price item, price item parameters, and account. A transaction leg is created for each price item, price item parameters, and account combination.

For example, the following table illustrates how the related transaction legs are created for each price item, price item parameters, and account combination:

Transaction Record Type	Primary Pricing Rule Type	Related Pricing Rule Type	Price Item in Related Pricing Rule Type	Effective Pricing Rule	Account	Active Contract	Transaction Leg
TR1	CLAIM	SPECIFIC STOP-LOSS	S3	PRS3	A1	C3	TL3
			S4	PRS4	A2	C4	TL4

Example 6: Transaction Leg Derivation

In the example 6, the system creates two transaction legs - TL3 and TL4 for the claim transaction. Once a transaction leg is created, the respective effective pricing rule is stamped against the transaction leg. Usually, once a transaction leg is created in the **Validate Transaction and Derive Price Item (C1-TXNIP)** batch, the price item parameters (for which the parameter usage is set to **Pricing**) of the transaction leg are grouped. The system does not support multiple parameter based pricing for the pricing rule types where the pricing rule type category is set to **Specific Stop-Loss** and **Aggregate Stop-Loss**. Therefore, when the price item parameters are not specified, the price item parameter group ID is set to 1 corresponding to each transaction leg - TL3 and TL4.

Note: A price item parameter group is used to determine the price item pricing. A unique group ID is generated for each group. If a group with a set of price item parameters already exists in the system, a new group is not created. Instead, the existing group is used for determining the price item pricing.

If a pricing group is used while defining a pricing rule for a bill group, the system fetches the pricing rule for a claim transaction when the following conditions are met:

- The incurred and paid dates of the claim transaction fall within the incurred and paid date ranges defined in the parent accumulation group (which is derived through the parent customer's pricing rule).
- A transaction leg is already created for at least one price item and price item parameters combination which is specified in the accumulation criteria.
- The employee attributes specified in the claim transaction match the criteria defined in any one of the pricing group rule.

Similarly, the system will fetch the pricing rule for a run-in claim transaction when the following conditions are met:

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- The run-in incurred and paid dates of the claim transaction fall within the run-in incurred and paid date ranges defined in the run-in accumulation group (which is derived through the parent customer's pricing rule).
- The effective pricing rule exists for at least one price item and price item parameters combination which is specified in the accumulation criteria.
- The employee attributes specified in the run-in claim transaction match the criteria defined in any one of the pricing group rule.

Let us understand this with the help of an example. A claim transaction is received with the following details:

- UDF_CHAR_1 is set to X
- UDF_CHAR_2 is set to Western
- UDF_CHAR_3 is set to Indian
- UDF_CHAR_4 is set to HR
- UDF_CHAR_5 is set to Permanent
- UDF_CHAR_6 is set to Senior Manager
- UDF_CHAR_7 is set to BG1
- UDF_DATE_1 is set to 31-12-2018
- UDF_DATE_2 is set to 28-02-2019
- Transaction Record Type is set to TR1

For example, the following table illustrates an effective related pricing rule which is defined using a specific stop-loss pricing rule type and where a pricing group is used:

Transaction Record Type	**Primary Pricing Rule Type**	**Related Pricing Rule Type**	**Price Item in Related Pricing Rule Type**	**Pricing Rule**	**Incurred Date Range in Associated Parent Customer's Pricing Rule**	**Paid Date Range in Associated Parent Customer's Pricing Rule**	**Pricing Group**	**Pricing Group Rule**	**Accumulation Criteria**
					(i.e. in Parent Accumulation Group)				
TR1	CLAIM	SPECIFIC STOP-LOSS	S1	PR1	01-01-2018 - 31-12-2018	01-01-2018 - 28-02-2019	PG1	Rule 1 (where Source System = X, Parameter 1 = Western, Parameter 2 = Indian, Parameter 3 = HR, and Parameter 4 = Permanent)	Price Item: CLM; Price Item Parameters: Designation = Senior Manager and Employee Group = BG1
								Rule 1 (where Source System = X, Parameter 1 = Western, Parameter 2 = Indian, Parameter 3 = HR, and Parameter 4 = Permanent)	Price Item: CLM; Price Item Parameters: Designation = Senior Manager and Employee Group = BG2
								Rule 2 (where Source System = X, Parameter 1 = Eastern, and Parameter 2 = Indian, Parameter 3 = HR, and Parameter 4 = Permanent)	Price Item: CLM; Price Item Parameters: Designation = Senior Manager and Employee Group = BG1
								Rule 2 (where Source System = X, Parameter 1	Price Item: CLM; Price Item Parameters: Designation =

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Transaction Record Type	Primary Pricing Rule Type	Related Pricing Rule Type	Price Item in Related Pricing Rule Type	Pricing Rule	Incurred Date Range in Associated Parent Customer's Pricing Rule (i.e. in Parent Accumulation Group)	Paid Date Range in Associated Parent Customer's Pricing Rule	Pricing Group	Pricing Group Rule	Accumulation Criteria
								= Eastern, and Parameter 2 = Indian, Parameter 3 = HR, and Parameter 4 = Permanent)	Senior Manager and Employee Group = BG2

Note:

Price Item in Primary Pricing Rule Type: CLM; Price Item Parameters in Primary Pricing Rule Type where the Eligible for Stop-Loss option is selected: Designation = UDF_CHAR_6 and Employee Group = UDF_CHAR_7.

Here, the source system is mapped to the **UDF_CHAR_1** field, the parameter 1 is mapped to the **UDF_CHAR_2** field, the parameter 2 is mapped to the **UDF_CHAR_3** field, the parameter 3 is mapped to the **UDF_CHAR_4** field, the parameter 4 is mapped to the **UDF_CHAR_5** field, the incurred date is mapped to the **UDF_DATE_1** field, and the paid date is mapped to the **UDF_DATE_2** field in the CLAIM pricing rule type.

Example 7: Effective Pricing Rule is Defined Using a Pricing Group

In the example 7, the system considers the PR1 pricing rule for S1 because of the following reasons:

- Incurred date mentioned in the claim transaction falls within the incurred date range (i.e. 01-01-2018 - 31-12-2018) defined in the parent accumulation group.
- Paid date mentioned in the claim transaction falls within the paid date range (i.e. 01-01-2018 - 28-02-2019) defined in the parent accumulation group.
- The employee attributes specified in the claim transaction match the criteria defined in the Rule 1 (i.e. Source System = X, Parameter 1 = Western, Parameter 2 = Indian, Parameter 3 = HR, and Parameter 4 = Permanent).
- A transaction leg already exists for the following price item and price item parameters combination which is specified in the accumulation criteria of the PR1 pricing rule:
    - Price Item: CLM; Price Item Parameters: Designation = Senior Manager and Employee Group = BG1

The system then stores the pricing group rule which is satisfied against a parameter which is defined in the **Pricing Group Rule Parameter** option type of the **C1-ASOBLLNG** feature configuration. In the example 7, the price item parameter group is created and it contains the pricing group rule parameter. For example, Group A contains Pricing Group Rule Parameter = Rule 1.

In the example 7, the system could find the exact match for pricing parameters defined in the pricing group rule. However, if the exact match is not available, the system finds the effective pricing rule using the best fit match for the pricing parameters defined in the pricing group rule. Let us understand this with the help of an example. A claim transaction is received with the following details:

- UDF_CHAR_1 is set to X
- UDF_CHAR_2 is set to Western
- UDF_CHAR_3 is set to Indian
- UDF_CHAR_4 is set to HR
- UDF_CHAR_5 is set to Permanent
- UDF_CHAR_6 is set to Senior Manager
- UDF_CHAR_7 is set to BG1
- UDF_DATE_1 is set to 06-06-2018
- UDF_DATE_2 is set to 27-06-2018
- Transaction Record Type is set to TR2

For example, the following table illustrates the effective related pricing rules which are available during the best fit match:

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Transaction Record Type	Primary Pricing Rule Type	Related Pricing Rule Type	Price Item in Related Pricing Rule Type	Pricing Rule	Incurred Date Range in Associated Parent Customer's Pricing Rule (i.e. in Parent Accumulation Group)	Paid Date Range in Associated Parent Customer's Pricing Rule	Pricing Group	Pricing Group Rule	Accumulation Criteria
TR2	CLAIM	SPECIFIC STOP-LOSS	S1	PR1	01-01-2018 - 31-12-2018	01-01-2018 - 28-02-2019	PG1	Rule 1 (where Source System = X and Parameter 1 = Western)	Price Item: CLAIM; Price Item Parameters: Designation = Senior Manager; Employee Group = BG1
								Rule 1 (where Source System = X and Parameter 1 = Western)	Price Item: CLAIM; Price Item Parameters: Designation = Senior Manager; Employee Group = BG2
								Rule 2 (where Source System = X and Parameter 1 = Eastern)	Price Item: CLAIM; Price Item Parameters: Designation = Senior Manager; Employee Group = BG1
								Rule 2 (where Source System = X and Parameter 1 = Eastern)	Price Item: CLAIM; Price Item Parameters: Designation = Senior Manager; Employee Group = BG2
			S2	PR2	01-01-2018 - 31-12-2018	01-01-2018 - 28-02-2019	PG2	Rule 1 (where Source System = X, Parameter 1 = Eastern, Parameter 2 = Indian, Parameter 3 = HR, and Parameter 4 = Permanent)	Price Item: CLAIM; Price Item Parameters: Designation = Senior Manager; Employee Group = BG2
								Rule 1 (where Source System = X, Parameter 1 = Eastern, Parameter 2 = Indian, Parameter 3 = HR, and Parameter 4 = Permanent)	Price Item: CLAIM; Price Item Parameters: Designation = Senior Manager; Employee Group = BG1
								Rule 2 (where Source System = X, Parameter 1 = Western, Parameter 2 = Indian, Parameter 3 = HR, and Parameter 4 = Permanent)	Price Item: CLAIM; Price Item Parameters: Designation = Senior Manager; Employee Group = BG2
								Rule 2 (where Source System = X,	Price Item: CLAIM; Price Item Parameters:

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Transaction Record Type	Primary Pricing Rule Type	Related Pricing Rule Type	Price Item in Related Pricing Rule Type	Pricing Rule	Incurred Date Range in Associated Parent Customer's Pricing Rule (i.e. in Parent Accumulation Group)	Paid Date Range in Associated Parent Customer's Pricing Rule	Pricing Group	Pricing Group Rule	Accumulation Criteria
								Parameter 1 = Western, Parameter 2 = Indian, Parameter 3 = HR, and Parameter 4 = Permanent)	Designation = Senior Manager; Employee Group = BG1

Note:

Price Item in Primary Pricing Rule Type: CLAIM; Price Item Parameters in Primary Pricing Rule Type where the Eligible for Stop-Loss option is selected: Designation = UDF_CHAR_6 and Employee Group = UDF_CHAR_7.

Here, the source system is mapped to the **UDF_CHAR_1** field, the parameter 1 is mapped to the **UDF_CHAR_2** field, the parameter 2 is mapped to the **UDF_CHAR_3** field, the parameter 3 is mapped to the **UDF_CHAR_4** field, the parameter 4 is mapped to the **UDF_CHAR_5** field, the incurred date is mapped to the **UDF_DATE_1** field, and the paid date is mapped to the **UDF_DATE_2** field in the CLAIM pricing rule type.

Example 8: Effective Pricing Rule Derivation Using Best Fit Match for Pricing Parameters

In the example 8, the system could not find the exact match for the pricing parameters (i.e. Source System = X, Parameter 1 = Western, Parameter 2 = Indian, Parameter 3 = HR, and Parameter 4 = Permanent) in the effective pricing rule for S1. Therefore, the system searches for the best fit match. While searching for the best fit match, the system rules out the optional parameter 4 (i.e. Parameter 4 = Permanent) and then checks whether the pricing group rule where Source System = X, Parameter 1 = Western, Parameter 2 = Indian, and Parameter 3 = HR exists in the effective pricing rule. If so, it considers the pricing group rule for further processing. If not, the system then rules out the optional parameter 3 (i.e. Parameter 3 = HR) and then checks whether the pricing group rule where Source System = X, Parameter 1 = Western, and Parameter 2 = Indian exists in the effective pricing rule. If so, it considers the pricing group rule for further processing. If not, the system then rules out the optional parameter 2 (i.e. Parameter 2 = Indian) and then checks whether the pricing group rule where Source System = X and Parameter 1 = Western exists in the effective pricing rule. If so, it considers the pricing group rule for further processing. If not, the status of the transaction is changed to **Error**.

In the example 8, the system considers Rule 1 where Source System = X and Parameter 1 = Western as the best fit match in the PR1 pricing rule for S1. In addition, a transaction leg already exists for the following price item and price item parameters combination which is specified in the accumulation criteria of the PR1 pricing rule:

- Price Item: CLAIM; Price Item Parameters: Designation = Senior Manager; Employee Group = BG1

Therefore, the system fetches PR1 as the effective pricing rule for S1. In addition, the system fetches PR2 as the effective pricing rule for S2. The system creates two price item parameter groups - One contains Pricing Group Rule Parameter = Rule 1 and another contains Pricing Group Rule Parameter = Rule 2. Once the price item parameter group is created, the system creates the aggregation parameter group. An aggregation parameter group contains all price item parameters included in the related pricing rule type for which the parameter usage is set to **Aggregation**.

If the effective pricing rule is not derived for a price item or if the account or active contract for the account is not derived, the system does not create a transaction leg for the respective price item.

For example, the following table illustrates that transaction legs are created only when effective pricing rule and account with an active contract are derived for a price item and price item parameters combination:

Related Pricing Rule Type	Price Item	Effective Pricing Rule	Account	Active Contract	Transaction Leg
AGGREGATE STOP-LOSS	AS11	-	-	-	-
	AS12	PR12	A1	C1	TL11

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Related Pricing Rule Type	Price Item	Effective Pricing Rule	Account	Active Contract	Transaction Leg
	AS13	PR13	-	-	-
	AS14	PR14	A2	-	-
	AS15	PR15	-	-	-
	AS16	-	-	-	-
	AS17	PR17	A2	C2	TL12

Example 9: No. of Transaction Legs Derived

In the example 9, the system could not find the effective pricing rule for AS11 and AS16, the required account for AS13 and AS15, and the active contract for AS14 on A2. Therefore, in this case, the system creates two transaction legs - TL11 and TL12 for the transaction.

If the eligibility rule type is defined for a price item, the system maps the transaction to the price item when the eligibility rule is satisfied. If the eligibility rule is not satisfied, the system does not consider the price item for billing.

For example, the following table illustrates the related pricing rule types where eligibility criteria is considered while deriving transaction legs for the price items:

Sequence	Related Pricing Rule Type	Rule Type Eligibility Criteria Met	Price Item	Price Item Eligibility Criteria Met	Effective Pricing Rule	Account	Active Contract	Transaction Leg
10	SPECIFIC STOP-LOSS	Yes	SS1	Yes	PR1	A1	C1	TL1
			SS2	-	PR2	A2	C2	TL2
			SS3	No	-	-	-	-
20	AGGREGATE STOP-LOSS	No	AS4	-	-	-	-	-
			AS5	-	-	-	-	-
			AS6	-	-	-	-	-

Example 10: Price Item Eligibility for Transaction Leg Derivation

In the example 10, the eligibility criteria is defined for the SPECIFIC STOP-LOSS and AGGREGATE STOP-LOSS pricing rule types. However, the eligibility criteria for the AGGREGATE STOP-LOSS pricing rule type was not satisfied, and therefore it is not used for deriving the transaction legs. The eligibility criteria for SS1 was satisfied, but the eligibility criteria for SS3 was not satisfied. Therefore, in this case, the system creates two transaction legs (i.e. TL1 and TL2) for the claim transaction. For more information about the related pricing rule type eligibility and price item eligibility features, refer to the Related Pricing Rule Type Eligibility on page 3314 and Price Item Eligibility on page 3315 sections, respectively.

Once a transaction leg is created, the effective pricing rule's start date is set as the processing date corresponding to the transaction leg.

Account and Price Item Derivation (for the Retention Type Claim Based Pricing Rule Type Category)

Once the **Validate Transaction and Derive Price Item (C1-TXNIP)** batch calls the primary pricing rule type specified in the transaction record type, it calls the related pricing rule types (if any) defined in the primary pricing rule type. Note that the related pricing rule types are called one by one in the specified sequence. Let us understand this with the help of an example.

The following table illustrates how related pricing rule types can be sequenced in a claim pricing rule type:

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Primary Pricing Rule Type	Sequence	Related Pricing Rule Type
CLAIM	10	RETENTION TYPE CLAIM BASED
	20	SPECIFIC STOP-LOSS
	30	AGGREGATE STOP-LOSS

Example 1: Related Pricing Rule Type Sequence

In the example 1, the system first calls the related pricing rule type with the highest sequence (i.e. 10) once the CLAIM pricing rule type is called. The system calls the related pricing rule type irrespective of whether the transaction legs are derived using the primary pricing rule type. Once the RETENTION TYPE CLAIM BASED pricing rule type is called, the system calls the related pricing rule type with the next sequence (i.e. 20). This process continues until all related pricing rule types defined in the primary pricing rule type are called one by one in the specified sequence.

If the eligibility rule type is defined for a related pricing rule type, the system considers the related pricing rule type for deriving the transaction legs when the eligibility rule is satisfied. If the eligibility rule is not satisfied, the system does not consider the related pricing rule type for deriving the transaction legs. Let us understand this with the help of an example.

The following table illustrates a claim pricing rule type where eligibility criteria is considered while deriving transaction legs for the related pricing rule types:

Primary Pricing Rule Type	Sequence	Related Pricing Rule Type	Eligibility Criteria Met
CLAIM	10	RETENTION TYPE CLAIM BASED	Yes
	20	CLAIM BASED FEES	-
	30	CLAIM FEE CHARGES	No

Example 2: Related Pricing Rule Type Eligibility Criteria

In the example 2, the eligibility criteria is defined for the RETENTION TYPE CLAIM BASED and CLAIM FEE CHARGES pricing rule types. However, the eligibility criteria for the CLAIM FEE CHARGES pricing rule type was not satisfied, and therefore it is not used for deriving the transaction legs.

The **Validate Transaction and Derive Price Item (C1-TXNIP)** batch maps a claim transaction to one or more price item and price item parameters which are defined in the eligible related pricing rule type. This is possible when you attach an algorithm created using the **C1_ACCPRIDRV** algorithm type to the **Account and Price Item Derivation** system event of the related pricing rule type.

This algorithm fetches the effective pricing rule for each price item and price item parameters combination specified in the related pricing rule type on the derivation date. The system considers the paid date as the derivation date. This algorithm first searches for the effective pricing rule for a price item and price item parameters combination which is defined for the policy at the bill group level. If the system does not find any effective pricing rule for a price item and price item parameters combination which is defined for the policy at the bill group level, it inherits the effective pricing rule for a price item and price item parameters combination from the parent customer level.

For example, if the system receives a claim transaction with the following details:

- UDF_DATE_1 is set to 15-01-2018
- Transaction Record Type is set to TR1

The following table illustrates how the related pricing rules are defined for the claim transactions at different assignment levels:

Transaction Record Type	Primary Pricing Rule Type	Related Pricing Rule Type	Price Item in Related Pricing Rule Type	Pricing Rule	Pricing Start Date	Pricing End Date	Assignment Level
TR1	CLAIM	RETENTION TYPE CLAIM BASED	P3	C1P3	01-01-2018	31-12-2018	Parent Customer
				C2P3	01-01-2018	31-12-2018	Bill Group

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Transaction Record Type	Primary Pricing Rule Type	Related Pricing Rule Type	Price Item in Related Pricing Rule Type	Pricing Rule	Pricing Start Date	Pricing End Date	Assignment Level
			P4	C1P4	01-01-2018	31-12-2018	Parent Customer
				C2P4	01-01-2019	30-06-2019	Bill Group

Note: Here, the paid date is mapped to the **UDF_DATE_1** field in the CLAIM pricing rule type.

Example 3: Effective Pricing Rule Derivation

In the example 3, the system fetches C2P3 and C1P4 pricing rules for P3 and P4 respectively, which are effective on the paid date. Note that the effective pricing rule for P3 is derived at the bill group level, whereas the effective pricing rule for P4 is derived from the parent customer level.

While fetching the effective pricing rule, the system first searches for the exact match for the price item parameters at both the levels. For example, if the system receives a claim transaction with the following details:

- UDF_CHAR_1 is set to Western
- UDF_CHAR_2 is set to Active
- UDF_DATE_1 is set to 20-03-2018
- Transaction Record Type is set to TR4

The following table illustrates an example where the system fetches the effective related pricing rules for a claim transaction at different assignment levels using the exact match option:

Transaction Record Type	Primary Pricing Rule Type	Related Pricing Rule Type	Price Item in Related Pricing Rule Type	Price Item Parameters in Related Pricing Rule Type	Pricing Rule	Pricing Start Date	Pricing End Date	Price Item Parameters in Pricing Rule	Fees	Assignment Level
TR4	CLAIM	CLAIM BASED CHARGES	P1	Location = UDF_CHAR_1 and Employee Status = UDF_CHAR_2	C1P1	01-01-2018	31-12-2018	Location = Western and Employee Status = Active	$10	Parent Customer
								Location = Eastern and Employee Status = Active	$12	
								Location = Eastern and Employee Status = Retired	$11	
								Location = Western and Employee Status = Retired	$9	
					C2P1	01-01-2018	31-12-2018	Location = Western and Employee Status = Active	$8	Bill Group
								Location = Eastern and Employee Status = Active	$9	
								Location = Eastern and Employee Status = Retired	$10	
								Location = Western and Employee Status = Retired	$9	

Note: Here, the paid date is mapped to the **UDF_DATE_1** field in the CLAIM pricing rule type.

Example 4: Exact Match for Price Item Parameters

In the example 4, the system fetches the C2P1 pricing rule for P1 because of the following reasons:

- The paid date (i.e. 20-03-2018) of the claim transaction falls within the date range (i.e. 01-01-2018 to 31-12-2018) of the C2P1 pricing rule which is defined at the bill group level.
- It contains the exact match for the price item parameters which are received in the transaction.

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If the system cannot find the exact match for the price item parameters at both the levels, it searches for the best fit match for the price item parameters first at the bill group level and then at the parent customer level. For example, if the system receives a claim transaction with the following details:

- UDF_CHAR_1 is set to Western
- UDF_CHAR_2 is set to Active
- UDF_CHAR_3 is set to HR
- UDF_CHAR_4 is set to Indian
- UDF_DATE_1 is set to 07-06-2018
- Transaction Record Type is set to TR5

For example, the following table illustrates the effective related pricing rules which are available during the best fit match:

Transaction Record Type	Primary Pricing Rule Type	Related Pricing Rule Type	Price Item in Related Pricing Rule Type	Price Item Parameters in Related Pricing Rule Type	Pricing Rule	Pricing Start Date	Pricing End Date	Price Item Parameters in Pricing Rule	Fees	Assignment Level
TR5	CLAIM	RETENTION CLAIM BASED FEES	P3	Location = UDF_CHAR_1, Employee Status = UDF_CHAR_2, Employee Department = UDF_CHAR_3, and Nationality = UDF_CHAR_4	C1P3	01-01-2018	31-12-2018	Location = Western and Employee Status = Active	$10	Bill Group
								Location = Eastern and Employee Status = Active	$12	
								Location = Eastern and Employee Status = Retired	$11	
								Location = Western and Employee Status = Retired	$9	

Note: Here, the paid date is mapped to the **UDF_DATE_1** field in the CLAIM pricing rule type.

Example 5: Best Fit Match for Price Item Parameters

Note: The **Location** and **Employee Status** parameters are mandatory for P3. However, the **Employee Department** and **Nationality** parameters are optional with the priority set to 1 and 2, respectively.

In the example 5, the system could not find the exact match for the price item parameters (i.e. Location = Western, Employee Status = Active, Employee Department = HR, and Nationality = Indian) in the effective pricing rule for P3. Therefore, the system searches for the best fit match. While searching for the best fit match, the system rules out the optional parameter with lowest priority (i.e. Nationality = Indian) and checks whether pricing is defined for the price item parameters (i.e. Location = Western, Employee Status = Active, and Employee Department = HR) in the effective pricing rule. If so, it considers C1P3 as the effective pricing rule for P3. If not, the system rules out the optional parameter with the next lowest priority (i.e. Employee Department = HR) and checks whether pricing is defined for the price item parameters (i.e. Location = Western and Employee Status = Active) in the effective pricing rule. If so, it considers C1P3 as the effective pricing rule for P3. If not, the status of the transaction is changed to **Error**.

In the example 5, the system considers pricing defined for the price item parameters (i.e. Location = Western and Employee Status = Active) as the best fit match, and therefore fetches C1P3 as the effective pricing rule for P3. While fetching the effective pricing rule, the system considers only those price item parameters specified in the related pricing rule type for which the parameter usage is set to **Pricing**.

The system then derives the account with a particular invoice type (to which a price item must be billed) based on the priority which is defined for the respective price item in the related pricing rule type.

For example, the following table illustrates the accounts to which the charges of P3 and P4 should be billed based on the given priority:

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Related Pricing Rule Type	Price Item	Priority	Invoice Type	Account
RETENTION TYPE CLAIM BASED	P3	10	Standard	A1
	P4	10	Retention	A2
		20	Standard	A1

Example 6: Priority Based Account Derivation

In the example 6, while mapping the claim transaction to P3, the system checks whether an account where the **Invoice Type (C1INVTYP)** characteristic is set to **Standard** exists for the bill group. If so, it considers the standard account (A1) of the bill group for billing. However, if an account where the **Invoice Type (C1INVTYP)** characteristic is set to **Standard** does not exist for the bill group, the status of the transaction is changed to **Error**.

Similarly, while mapping the claim transaction to P4, the system checks whether an account where the **Invoice Type (C1INVTYP)** characteristic is set to **Retention** exists for the bill group. If so, it considers the retention account (A2) of the bill group for billing. However, if an account where the **Invoice Type (C1INVTYP)** characteristic is set to **Retention** does not exist for the bill group, the system checks whether an account where the **Invoice Type (C1INVTYP)** characteristic is set to **Standard** exists for the bill group. If so, it considers the standard account (A1) of the bill group for billing. If an account where the **Invoice Type (C1INVTYP)** characteristic is set to **Standard** does not exist for the bill group, the status of the transaction is changed to **Error**.

Note: The characteristic type which indicates the type of account (for example, **C1INVTYP**) must be specified in the **Invoice Type Characteristic Type** option type of the **C1-ASOBLLNG** feature configuration. Otherwise, erroneous results might occur.

Once the account is derived, the system then checks whether the account has one active contract of the contract type which is associated with the price item. If so, it fetches the contract for further processing. Once the effective pricing rule, account, and active contract are derived, the transaction is mapped to the respective price item, price item parameters, and account. A transaction leg is created for each price item, price item parameters, and account combination. For example, if the system receives a claim transaction with the following details:

- UDF_CHAR_1 is set to Western
- UDF_CHAR_2 is set to Active
- UDF_CHAR_3 is set to HR
- UDF_DATE_1 is set to 03-01-2018
- Transaction Record Type is set to TR5

For example, the following table illustrates how the related transaction legs are created for each price item, price item parameters, and account combination:

Transaction Record Type	Primary Pricing Rule Type	Related Pricing Rule Type	Price Item in Related Pricing Rule Type	Price Item Parameters in Related Pricing Rule Type	Effective Pricing Rule	Best Fit Match for Price Item Parameters in Effective Pricing Rule	Account	Active Contract	Transaction Leg
TR5	CLAIM	CLAIM BASED FEES	P1	Location = UDF_CHAR_1, Employee Status = UDF_CHAR_2, Employee Department = UDF_CHAR_3, and Nationality = UDF_CHAR_4	PR1	Location = Western and Employee Status = Active	A1	C1	TL1
			P2		PR2	Location = Western and Employee Status = Active	A2	C2	TL2
			P3		PR3	Location = Western and Employee Status = Active	A3	C3	TL3

Note: Here, the paid date is mapped to the **UDF_DATE_1** field in the CLAIM pricing rule type.

Example 7: Transaction Leg Derivation

In the example 7, the system maps the claim transaction to the following price item, price item parameters, and account combinations:

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- Price Item: P1; Price Item Parameter: Location = Western, Employee Status = Active, and Employee Department = HR; and Account: A1
- Price Item: P2; Price Item Parameter: Location = Western, Employee Status = Active, and Employee Department = HR; and Account: A2
- Price Item: P3; Price Item Parameter: Location = Western, Employee Status = Active, and Employee Department = HR; and Account: A3

Note: The nationality information of an employee is not received in the **UDF_CHAR_4** field, and therefore the claim transaction is not mapped to the **Nationality** price item parameter.

In the example 7, the system creates three transaction legs - TL1, TL2, and TL3 for the claim transaction. Once a transaction leg is created, the respective effective pricing rule is stamped against the transaction leg. In addition, the price item parameters of the transaction leg are grouped. In the example 7, the system creates one price item parameter group which contains the following price item parameters:

- Location = Western
- Employee Status = Active
- Employee Department = HR

A group is used to determine the price item pricing. A unique group ID is generated for each group. If a group with a set of price item parameters already exists in the system, a new group is not created. Instead, the existing group is used for determining the price item pricing.

Note: The price item parameter group contains only those price item parameters included in the related pricing rule type for which the parameter usage is set to **Pricing**.

If a pricing group is used while defining a pricing rule for a bill group, the system fetches the pricing rule for a claim transaction when the following conditions are met:

- The paid date of the claim transaction falls within the pricing rule's date range.
- The employee attributes specified in the claim transaction match the criteria defined in any one of the pricing group rule.
- The employee attributes specified in the claim transaction match the price item parameters defined within the satisfied rule.

Let us understand this with the help of an example. A claim transaction is received with the following details:

- UDF_CHAR_1 is set to X
- UDF_CHAR_2 is set to Western
- UDF_CHAR_3 is set to Indian
- UDF_CHAR_4 is set to HR
- UDF_CHAR_5 is set to Permanent
- UDF_CHAR_6 is set to Senior Manager
- UDF_CHAR_7 s set to BG1
- UDF_DATE_1 03-01-2018
- Transaction Record Type is set to TR6

For example, the following table illustrates an effective related pricing rule which is defined using a retention type claim based pricing rule type and where a pricing group is used:

Transaction Record Type	Primary Pricing Rule Type	Related Pricing Rule Type	Price Item in Related Pricing Rule Type	Price Item Parameters in Related Pricing Rule Type	Pricing Rule	Pricing Start Date	Pricing End Date	Pricing Group	Pricing Group Rule	Price Item Parameters	Fees
TR6	CLAIM	CLAIM BASED FEES	PP1	Designation = UDF_CHAR_6; Employee Group = UDF_CHAR_7	PR1	01-01-2018	31-12-2018	PG1	Rule 1 (where Source System = X, Parameter 1 = Western, Parameter 2 = Indian, Parameter 3 = HR, and Parameter 4 = Permanent)	Designation = Senior Manager and Employee Group = BG1	$10

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Transaction Record Type	Primary Pricing Rule Type	Related Pricing Rule Type	Price Item in Related Pricing Rule Type	Price Item Parameters in Related Pricing Rule Type	Pricing Rule	Pricing Start Date	Pricing End Date	Pricing Group	Pricing Group Rule	Price Item Parameters	Fees
									Rule 1 (where Source System = X, Parameter 1 = Western, Parameter 2 = Indian, Parameter 3 = HR, and Parameter 4 = Permanent)	Designation = Senior Manager and Employee Group = BG2	$12
									Rule 2 (where Source System = X, Parameter 1 = Eastern, and Parameter 2 = Indian, Parameter 3 = HR, and Parameter 4 = Permanent)	Designation = Senior Manager and Employee Group = BG1	$8
									Rule 2 (where Source System = X, Parameter 1 = Eastern, and Parameter 2 = Indian, Parameter 3 = HR, and Parameter 4 = Permanent)	Designation = Senior Manager and Employee Group = BG2	$9

Note: Here, the source system is mapped to the **UDF_CHAR_1** field, the parameter 1 is mapped to the **UDF_CHAR_2** field, the parameter 2 is mapped to the **UDF_CHAR_3** field, the parameter 3 is mapped to the **UDF_CHAR_4** field, the parameter 4 is mapped to the **UDF_CHAR_5** field, and the paid date is mapped to the **UDF_DATE_1** field in the CLAIM pricing rule type.

Example 8: Effective Pricing Rule is Defined Using a Pricing Group

In the example 8, the system considers the PR1 pricing rule for PP1 because of the following reasons:

- The paid date (i.e. 03-01-2018) of the claim transaction falls within the PR1 pricing rule's date range (i.e. 01-01-2018 to 31-12-2018).
- The employee attributes specified in the claim transaction match the criteria defined in the Rule 1 (i.e. Source System = X, Parameter 1 = Western, Parameter 2 = Indian, Parameter 3 = HR, and Parameter 4 = Permanent).
- The employee attributes specified in the claim transaction match the price item parameters defined within the Rule 1.

The system then stores the pricing group rule which is satisfied against a parameter which is defined in the **Pricing Group Rule Parameter** option type of the **C1-ASOBLLNG** feature configuration. In such case, the price item parameter group contains the price item parameters and the pricing group rule parameter. For example, Group A contains Designation = Senior Manager, Employee Group = BG1, and Pricing Group Rule Parameter = Rule 1.

In the example 8, the system could find the exact match for pricing parameters defined in the pricing group rule. However, if the exact match is not available, the system finds the effective pricing rule using the best fit match for the pricing parameters defined in the pricing group rule. Note that the system searches for the exact match in the effective pricing rules at both the bill group and parent customer levels. If the exact match is not available at both the levels, the system finds the effective pricing rule using the best fit match for the pricing parameters (defined in the pricing group rule) first at the bill group level and then at the parent customer level.

Let us understand this with the help of an example. A claim transaction is received with the following details:

- UDF_CHAR_1 is set to X
- UDF_CHAR_2 is set to Western
- UDF_CHAR_3 is set to Indian
- UDF_CHAR_4 is set to HR
- UDF_CHAR_5 is set to Permanent

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- UDF_CHAR_6 is set to Senior Manager
- UDF_CHAR_7 is set to BG1
- UDF_DATE_1 is set to 31-05-2018
- Transaction Record Type is set to TR6

For example, the following table illustrates the effective related pricing rules which are available during the best fit match:

Transaction Record Type	Primary Pricing Rule Type	Related Pricing Rule Type	Price Item in Related Pricing Rule Type	Price Item Parameters in Related Pricing Rule Type	Pricing Rule	Pricing Start Date	Pricing End Date	Pricing Group	Pricing Group Rule	Price Item Parameters in Pricing Rule	Fees
TR6	CLAIM	CLAIM BASED FEES	PP1	Designation = UDF_CHAR_6, Employee Group = UDF_CHAR_7	PR1	01-01-2018	31-12-2018	PG1	Rule 1 (where Source System = X and Parameter 1 = Western)	Designation = Senior Manager; Employee Group = BG1	$20
									Rule 1 (where Source System = X and Parameter 1 = Western)	Designation = Senior Manager; Employee Group = BG2	$21
									Rule 2 (where Source System = X and Parameter 1 = Eastern)	Designation = Senior Manager; Employee Group = BG1	$18
									Rule 2 (where Source System = X and Parameter 1 = Eastern)	Designation = Senior Manager; Employee Group = BG2	$19
			PP2		PR2	01-01-2018	31-12-2018	PG2	Rule 1 (where Source System = X, Parameter 1 = Eastern, Parameter 2 = Indian, Parameter 3 = HR, and Parameter 4 = Permanent)	Designation = Senior Manager; Employee Group = BG2	$5
									Rule 1 (where Source System = X, Parameter 1 = Eastern, Parameter 2 = Indian, Parameter 3 = HR, and Parameter 4 = Permanent)	Designation = Senior Manager; Employee Group = BG1	$5
									Rule 2 (where Source System = X, Parameter 1 = Western, Parameter 2 = Indian, Parameter 3 = HR, and Parameter 4 = Permanent)	Designation = Senior Manager; Employee Group = BG2	$6

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Transaction Record Type	Primary Pricing Rule Type	Related Pricing Rule Type	Price Item in Related Pricing Rule Type	Price Item Parameters in Related Pricing Rule Type	Pricing Rule	Pricing Start Date	Pricing End Date	Pricing Group	Pricing Group Rule	Price Item Parameters in Pricing Rule	Fees
									Rule 2 (where Source System = X, Parameter 1 = Western, Parameter 2 = Indian, Parameter 3 = HR, and Parameter 4 = Permanent)	Designation = Senior Manager; Employee Group = BG1	$9

Note: Here, the source system is mapped to the **UDF_CHAR_1** field, the parameter 1 is mapped to the **UDF_CHAR_2** field, the parameter 2 is mapped to the **UDF_CHAR_3** field, the parameter 3 is mapped to the **UDF_CHAR_4** field, the parameter 4 is mapped to the **UDF_CHAR_5** field, and the paid date is mapped to the **UDF_DATE_1** field in the CLAIM pricing rule type.

Example 9: Effective Pricing Rule Derivation Using Best Fit Match for Pricing Parameters

In the example 9, the system could not find the exact match for the pricing parameters (i.e. Source System = X, Parameter 1 = Western, Parameter 2 = Indian, Parameter 3 = HR, and Parameter 4 = Permanent) in the effective pricing rule for PP1. Therefore, the system searches for the best fit match. While searching for the best fit match, the system rules out the optional parameter 4 (i.e. Parameter 4 = Permanent) and then checks whether the pricing group rule where Source System = X, Parameter 1 = Western, Parameter 2 = Indian, and Parameter 3 = HR exists in the effective pricing rule. If so, it considers the pricing group rule for further processing. If not, the system then rules out the optional parameter 3 (i.e. Parameter 3 = HR) and then checks whether the pricing group rule where Source System = X, Parameter 1 = Western, and Parameter 2 = Indian exists in the effective pricing rule. If so, it considers the pricing group rule for further processing. If not, the system then rules out the optional parameter 2 (i.e. Parameter 2 = Indian) and then checks whether the pricing group rule where Source System = X and Parameter 1 = Western exists in the effective pricing rule. If so, it considers the pricing group rule for further processing. If not, the status of the transaction is changed to **Error**.

In the example 9, the system considers Rule 1 where Source System = X and Parameter 1 = Western as the best fit match in the PR1 pricing rule for PP1. In addition, the employee attributes in the claim transaction satisfy the price item parameters (i.e. Designation = Senior Manager and Employee Group = BG1) defined within the Rule 1. Therefore, the system fetches PR1 as the effective pricing rule for PP1. In addition, the system fetches PR2 as the effective pricing rule for PP2. The system creates two price item parameter groups - One contains Designation = Senior Manager, Employee Group = BG1, and Pricing Group Rule Parameter = Rule 1 and another contains Designation = Senior Manager, Employee Group = BG1, and Pricing Group Rule Parameter = Rule 2. Once the price item parameter group is created, the system creates the aggregation parameter group. An aggregation parameter group contains all price item parameters included in the related pricing rule type for which the parameter usage is set to **Aggregation**.

If the effective pricing rule is not derived for a price item and price item parameters combination or if the account or active contract for the account is not derived, the system does not create a transaction leg for the respective price item.

For example, the following table illustrates that transaction legs are created only when effective pricing rule and account with an active contract are derived for a price item and price item parameters combination:

Related Pricing Rule Type	Price Item	Price Item Parameters	Effective Pricing Rule	Account	Active Contract	Transaction Leg
RETENTION TYPE CLAIM BASED	PP11	Designation = UDF_CHAR_6, Employee Status = UDF_CHAR_7	-	-	-	-
	PP12		PR12	A1	C1	TL11
	PP13		PR13	-	-	-
	PP14		PR14	A2	-	-
	PP15		PR15	-	-	-
	PP16		-	-	-	-
	PP17		PR17	A2	C2	TL12

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Example 10: No. of Transaction Legs Derived

In the example 10, the system could not find the effective pricing rule for PP11 and PP16, the required account for PP13 and PP15, and the active contract for PP14 on A2. Therefore, in this case, the system creates two transaction legs - TL11 and TL12 for the transaction.

If the eligibility rule type is defined for a price item, the system maps the transaction to the price item when the eligibility rule is satisfied. If the eligibility rule is not satisfied, the system does not consider the price item for billing.

For example, the following table illustrates a claim pricing rule type where eligibility criteria is considered while deriving transaction legs for the related pricing rule types:

Sequence	Related Pricing Rule Type	Rule Type Eligibility Criteria Met	Price Item	Price Item Eligibility Criteria Met	Effective Pricing Rule	Account	Active Contract	Transaction Leg
10	RETENTION TYPE CLAIM BASED	Yes	PE1	Yes	PR1	A1	C1	TL1
			PE2	-	PR2	A2	-	-
			PE3	No	-	-	-	-
20	CLAIM BASED FEES	-	PE4	-	PR3	A1	C2	TL2
			PE5	Yes	PR4	-	-	-
			PE6	No	-	-	-	-
30	CLAIM FEE CHARGES	No	PE7	-	-	-	-	-
			PE8	-	-	-	-	-
			PE9	-	-	-	-	-

Example 11: Price Item Eligibility for Transaction Leg Derivation

In the example 11, the eligibility criteria is defined for the RETENTION TYPE CLAIM BASED and CLAIM FEE CHARGES pricing rule types. However, the eligibility criteria for the CLAIM FEE CHARGES pricing rule type was not satisfied, and therefore it is not used for deriving the transaction legs. The eligibility criteria for PE1 and PE5 was satisfied, but the eligibility criteria for PE3 and PE6 was not satisfied. Further, the system could not find the required account for PE5 and the active contract for PE2 on A2. Therefore, in this case, the system creates two transaction legs (i.e. TL1 and TL2) for the claim transaction. For more information about the related pricing rule type eligibility and price item eligibility features, refer to the Related Pricing Rule Type Eligibility on page 3314 and Price Item Eligibility on page 3315 sections, respectively.

Once a transaction leg is created, the derivation date is set as the processing date corresponding to the transaction leg.

Account and Price Item Derivation (for the Retention Type Enrollment Based Pricing Rule Type Category)

The **Validate Transaction and Derive Price Item (C1-TXNIP)** batch maps the retroactive and non-retroactive enrollment transactions to one or more price item and price item parameters which are defined in the respective primary pricing rule type. This is possible only when an algorithm created using the **C1_ACCPRIDRV** algorithm type is attached to the **Account and Price Item Derivation** system event of the primary pricing rule type.

This algorithm fetches the effective pricing rule for each price item and price item parameters combination specified in the primary pricing rule type on the derivation date. The system considers the coverage end date and coverage start date as the derivation date while fetching the effective pricing rules for the retroactive and non-retroactive enrollment transactions, respectively. This algorithm first searches for the effective pricing rule for a price item and price item parameters combination which is defined for the policy at the bill group level. If the system does not find any effective pricing rule for a price item and price item parameters combination which is defined for the policy at the bill group level, it inherits the effective pricing rule for a price item and price item parameters combination from the parent customer level.

For example, if the system receives a non-retroactive enrollment transaction with the following details:

- UDF_DATE_1 is set to 01-02-2018

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- UDF_DATE_2 is set to 28-02-2018
- Transaction Record Type is set to TR3

The following table illustrates how the pricing rules are defined for the enrollment transactions at different assignment levels:

Transaction Record Type	Primary Pricing Rule Type	Price Item	Pricing Rule	Pricing Start Date	Pricing End Date	Assignment Level
TR3	RETENTION TYPE ENROLLMENT BASED	P1	C1P1	01-01-2018	31-12-2018	Parent Customer
			C2P1	01-01-2018	31-12-2018	Bill Group
			C3P1	01-01-2019	30-06-2019	Bill Group
		P2	C1P2	01-06-2017	31-12-2017	Bill Group
			C2P2	01-01-2018	31-12-2018	Parent Customer
			C3P2	01-01-2019	30-06-2019	Bill Group

Note: Here, the coverage start date is mapped to the **UDF_DATE_1** field and the coverage end date is mapped to the **UDF_DATE_2** field in the RETENTION TYPE ENROLLMENT BASED pricing rule type.

Example 1: Effective Pricing Rule Derivation

In the example 1, the system fetches C2P1 and C2P2 pricing rules for P1 and P2, respectively, which are effective on the coverage start date. Note that the effective pricing rule for P1 is derived at the bill group level, whereas the effective pricing rule for P2 is derived from the parent customer level.

While fetching the effective pricing rule, the system first searches for exact match for the price item parameters at both the levels. For example, if the system receives a retroactive enrollment transaction with the following details:

- UDF_CHAR_1 is set to Western
- UDF_CHAR_2 is set to Active
- UDF_DATE_1 is set to 01-03-2018
- UDF_DATE_2 is set to 31-03-2018
- Transaction Record Type is set to TR4

The following table illustrates the effective pricing rules which are available at different assignment levels for an enrollment transaction during the exact match:

Transaction Record Type	Primary Pricing Rule Type	Price Item	Price Item Parameters	Pricing Rule	Pricing Start Date	Pricing End Date	Price Item Parameters in Pricing Rule	Fees	Assignment Level
TR4	ENROLLMENT BASED FEES	P1	Location = UDF_CHAR_1 and Employee Status = UDF_CHAR_2	C1P1	01-01-2018	31-12-2018	Location = Western and Employee Status = Active	$10	Parent Customer
							Location = Eastern and Employee Status = Active	$12	
							Location = Eastern and Employee Status = Retired	$11	
							Location = Western and Employee Status = Retired	$9	
				C2P1	01-01-2018	31-12-2018	Location = Western and Employee Status = Active	$8	Bill Group
							Location = Eastern and Employee Status = Active	$9	
							Location = Eastern and Employee Status = Retired	$10	
							Location = Western and Employee Status = Retired	$9	

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Note: Here, the coverage start date is mapped to the **UDF_DATE_1** field and the coverage end date is mapped to the **UDF_DATE_2** field in the ENROLLMENT BASED FEES pricing rule type.

Example 2: Exact Match for Price Item Parameters

In the example 2, the system fetches the C2P1 pricing rule for P1 because of the following reasons:

- The coverage end date (i.e. 31-03-2018) of the retroactive enrollment transaction falls within the date range (i.e. 01-01-2018 to 31-12-2018) of the C2P1 pricing rule which is defined at the bill group level.
- It contains the exact match for the price item parameters which are received in the transaction.

If the system cannot find the exact match for the price item parameters at both the levels, the system searches for the best fit match for the price item parameters first at the bill group level and then at the parent customer level. For example, if the system receives a retroactive enrollment transaction with the following details:

- UDF_CHAR_1 is set to Western
- UDF_CHAR_2 is set to Active
- UDF_CHAR_3 is set to HR
- UDF_CHAR_4 is set to Indian
- UDF_DATE_1 is set to 01-03-2018
- UDF_DATE_2 is set to 31-03-2018
- Transaction Record Type is set to TR5

For example, the following table illustrates the effective pricing rules which are available during the best fit match:

Transaction Record Type	Primary Pricing Rule Type	Price Item	Price Item Parameters	Pricing Rule	Pricing Start Date	Pricing End Date	Price Item Parameters in Pricing Rule	Fees	Assignment Level
TR5	ENROLLMENT BASED CHARGES	P3	Location = UDF_CHAR_1, Employee Status = UDF_CHAR_2, Employee Department = UDF_CHAR_3, and Nationality = UDF_CHAR_4	C1P3	01-01-2018	31-12-2018	Location = Western and Employee Status = Active	$10	Bill Group
							Location = Eastern and Employee Status = Active	$12	
							Location = Eastern and Employee Status = Retired	$11	
							Location = Western and Employee Status = Retired	$9	

Note:

Here, the coverage start date is mapped to the **UDF_DATE_1** field and the coverage end date is mapped to the **UDF_DATE_2** field in the ENROLLMENT BASED CHARGES pricing rule type.

Here, the **Location** and **Employee Status** parameters are mandatory for P3. However, the **Employee Department** and **Nationality** parameters are optional with the priority set to 1 and 2, respectively.

Example 3: Best Fit Match for Price Item Parameters

In the example 3, the system could not find the exact match for the price item parameters (i.e. Location = Western, Employee Status = Active, Employee Department = HR, and Nationality = Indian) in the effective pricing rule for P3. Therefore, the system searches for the best fit match. While searching for the best fit match, the system rules out the optional parameter with lowest priority (i.e. Nationality = Indian) and checks whether pricing is defined for the price item parameters (i.e. Location = Western, Employee Status = Active, and Employee Department = HR) in the effective pricing rule. If so, it considers C1P3 as the effective pricing rule for P3. If not, the system rules out the optional parameter with the next lowest priority (i.e. Employee Department = HR) and checks whether pricing is defined for the price item parameters (i.e. Location = Western and Employee Status = Active) in the effective pricing rule. If so, it considers C1P3 as the effective pricing rule for P3. If not, the status of the transaction is changed to **Error**.

In the example 3, the system considers pricing defined for the price item parameters (i.e. Location = Western and Employee Status = Active) as the best fit match, and therefore fetches C1P3 as the effective pricing rule for P3. While

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fetching the effective pricing rule, the system considers only those price item parameters specified in the primary pricing rule type for which the parameter usage is set to **Pricing**. For retroactive enrollment transactions, the system considers only those effective pricing rules where the **Exempt Retro Transactions** option is not selected.

The system then derives the account with a particular invoice type (to which a price item must be billed) based on the priority which is defined for the respective price item in the pricing rule type.

For example, the following table illustrates the accounts to which the charges of P1 and P2 should be billed based on the given priority:

Price Item	Priority	Invoice Type	Account
P1	10	Standard	A1
	20	Retention	A2
P2	10	Retention	A2
	20	Standard	A1

Example 4: Priority Based Account Derivation

In the example 4, while mapping the enrollment transaction to P1, the system checks whether an account where the **Invoice Type (C1INVTYP)** characteristic is set to **Standard** exists for the bill group. If so, it considers the standard account (A1) of the bill group for billing. However, if an account where the **Invoice Type (C1INVTYP)** characteristic is set to **Standard** does not exist for the bill group, the system checks whether an account where the **Invoice Type (C1INVTYP)** characteristic is set to **Retention** exists for the bill group. If so, it considers the retention account (A2) of the bill group for billing. If an account where the **Invoice Type (C1INVTYP)** characteristic is set to **Retention** does not exist for the bill group, the status of the transaction is changed to **Error**.

Similarly, while mapping the enrollment transaction to P2, the system considers the account of the bill group which is available based on the priority. The system derives the billing account for only those price items for which the effective pricing rule is derived.

Note: The characteristic type which indicates the type of account (for example, **C1INVTYP**) must be specified in the **Invoice Type Characteristic Type** option type of the **C1-ASOBLLNG** feature configuration. Otherwise, erroneous results might occur.

Once the account is derived, the system then checks whether the account has one active contract of the contract type which is associated with the price item. If so, it fetches the contract for further processing. Once the effective pricing rule, account, and active contract are derived, the transaction is mapped to the respective price item, price item parameters, and account. A transaction leg is created for each price item, price item parameters, and account combination. For example, if the system receives a non-retroactive enrollment transaction with the following details:

- UDF_CHAR_1 is set to Western
- UDF_CHAR_2 is set to Active
- UDF_CHAR_3 is set to HR
- UDF_DATE_1 is set to 01-03-2018
- UDF_DATE_2 is set to 31-03-2018
- Transaction Record Type is set to TR5

For example, the following table illustrates that transaction legs are created only when effective pricing rule and account with an active contract are derived for a price item and price item parameters combination:

Transaction Record Type	Primary Pricing Rule Type	Price Item	Price Item Parameters	Effective Pricing Rule	Best Fit Match for Price Item Parameters in Effective Pricing Rule	Account	Active Contract	Transaction Leg
TR5	ENROLLMENT BASED FEES	P1	Location = UDF_CHAR_1, Employee Status = UDF_CHAR_2, Employee Department = UDF_CHAR_3, and Nationality = UDF_CHAR_4	PR1	Location = Western and Employee Status = Active	A1	C1	TL1
		P2		PR2	Location = Western and Employee Status = Active	A2	C2	TL2

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Transaction Record Type	Primary Pricing Rule Type	Price Item	Price Item Parameters	Effective Pricing Rule	Best Fit Match for Price Item Parameters in Effective Pricing Rule	Account	Active Contract	Transaction Leg
		P3		PR3	Location = Western and Employee Status = Active	A3	C3	TL3

Note: Here, the coverage start date is mapped to the **UDF_DATE_1** field and the coverage end date is mapped to the **UDF_DATE_2** field in the ENROLLMENT BASED FEES pricing rule type.

Example 5: Transaction Leg Derivation

In the example 5, the system maps the non-retroactive enrollment transaction to the following price item, price item parameters, and account combinations:

- Price Item: P1; Price Item Parameter: Location = Western, Employee Status = Active, and Employee Department = HR; and Account: A1
- Price Item: P2; Price Item Parameter: Location = Western, Employee Status = Active, and Employee Department = HR; and Account: A2
- Price Item: P3; Price Item Parameter: Location = Western, Employee Status = Active, and Employee Department = HR; and Account: A3

Note: The nationality information of an employee is not received in the **UDF_CHAR_4** field, and therefore the non-retroactive enrollment transaction is not mapped to the **Nationality** price item parameter.

In the example 5, the system creates three transaction legs - TL1, TL2, and TL3 for the non-retroactive enrollment transaction. Once a transaction leg is created, the respective effective pricing rule is stamped against the transaction leg. In addition, the price item parameters of the transaction leg are grouped. In the example 5, the system creates one price item parameter group which contains the following price item parameters:

- Location = Western
- Employee Status = Active
- Employee Department = HR

A group is used to determine the price item pricing. A unique group ID is generated for each group. If a group with a set of price item parameters already exists in the system, a new group is not created. Instead, the existing group is used for determining the price item pricing.

Note: The price item parameter group contains only those price item parameters included in the pricing rule type for which the parameter usage is set to **Pricing**.

The following table describes how the system fetches a pricing rule when a pricing group is used while defining the pricing rule for a bill group:

If the transaction is a...	Then the system fetches the pricing rule when the following conditions are met...
Retroactive enrollment transaction	• The coverage end date of the retroactive enrollment transaction falls within the pricing rule's date range. • The exact or best fit match is available for the price item parameters in the effective pricing rule. • The retroactive enrollment transaction satisfies the criteria defined in any one of the pricing group rule.
Non-retroactive enrollment transaction	• The coverage start date of the non-retroactive enrollment transaction falls within the pricing rule's date range. • The exact or best fit match is available for the price item parameters in the effective pricing rule.

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If the transaction is a...	Then the system fetches the pricing rule when the following conditions are met...
	• The non-retroactive enrollment transaction satisfies the criteria defined in any one of the pricing group rule.

Let us understand this with the help of an example. A retroactive enrollment transaction is received with the following details:

- UDF_CHAR_1 is set to X
- UDF_CHAR_2 is set to Western
- UDF_CHAR_3 is set to Indian
- UDF_CHAR_4 is set to HR
- UDF_CHAR_5 is set to Permanent
- UDF_CHAR_6 is set to Senior Manager
- UDF_CHAR_7 is set to BG1
- UDF_DATE_1 is set to 01-03-2018
- UDF_DATE_2 is set to 31-03-2018
- Transaction Record Type is set to TR6

For example, the following table illustrates an effective pricing rule which is defined using a retention type enrollment based pricing rule type and where a pricing group is used:

Transaction Record Type	Primary Pricing Rule Type	Price Item	Price Item Parameters	Pricing Rule	Pricing Start Date	Pricing End Date	Pricing Group	Pricing Group Rule	Price Item Parameters	Fees
TR6	ENROLLMENT BASED FEES	PP1	Designation = UDF_CHAR_6; Employee Group = UDF_CHAR_7	PR1	01-01-2018	31-12-2018	PG1	Rule 1 (where Source System = X, Parameter 1 = Western, Parameter 2 = Indian, Parameter 3 = HR, and Parameter 4 = Permanent)	Designation = Senior Manager and Employee Group = BG1	$10
								Rule 1 (where Source System = X, Parameter 1 = Western, Parameter 2 = Indian, Parameter 3 = HR, and Parameter 4 = Permanent)	Designation = Senior Manager and Employee Group = BG2	$12
								Rule 2 (where Source System = X, Parameter 1 = Eastern, and Parameter 2 = Indian, Parameter 3 = HR, and Parameter 4 = Permanent)	Designation = Senior Manager and Employee Group = BG1	$8
								Rule 2 (where Source System = X, Parameter 1 = Eastern, and Parameter 2 = Indian, Parameter 3 = HR, and Parameter 4 = Permanent)	Designation = Senior Manager and Employee Group = BG2	$9

Note: Here, the source system is mapped to the **UDF_CHAR_1** field, the parameter 1 is mapped to the **UDF_CHAR_2** field, the parameter 2 is mapped to the **UDF_CHAR_3** field, the parameter 3 is mapped to the **UDF_CHAR_4** field, the parameter 4 is mapped to the **UDF_CHAR_5** field, the coverage start date is mapped to the **UDF_DATE_1** field, and the coverage end date is mapped to the **UDF_DATE_2** field in the ENROLLMENT BASED FEES pricing rule type.

Example 6: Effective Pricing Rule is Defined Using a Pricing Group

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In the example 6, the system considers the PR1 pricing rule for PP1 because of the following reasons:

- The coverage end date (i.e. 31-03-2018) of the retroactive enrollment transaction falls within the PR1 pricing rule's date range (i.e. 01-01-2018 to 31-12-2018).
- The employee attributes specified in the retroactive enrollment transaction match the criteria defined in the Rule 1 (i.e. Source System = X, Parameter 1 = Western, Parameter 2 = Indian, Parameter 3 = HR, and Parameter 4 = Permanent)
- The employee attributes specified in the retroactive enrollment transaction match the price item parameters defined within the Rule 1.

The system then stores the pricing group rule which is satisfied against a parameter which is defined in the **Pricing Group Rule Parameter** option type of the **C1-ASOBLLNG** feature configuration. In such case, the price item parameter group contains the price item parameters and the pricing group rule parameter. For example, Group A contains Designation = Senior Manager, Employee Group = BG1, and Pricing Group Rule Parameter = Rule 1.

In the example 6, the system could find the exact match for pricing parameters defined in the pricing group rule. However, if the exact match is not available, the system finds the effective pricing rule using the best fit match for the pricing parameters defined in the pricing group rule. Note that the system searches for the exact match in the effective pricing rules at both the bill group and parent customer levels. If the exact match is not available at both the levels, the system finds the effective pricing rule using the best fit match for the pricing parameters (defined in the pricing group rule) first at the bill group level and then at the parent customer level.

Let us understand this with the help of an example. A non-retroactive enrollment transaction is received with the following details:

- UDF_CHAR_1 is set to X
- UDF_CHAR_2 is set to Western
- UDF_CHAR_3 is set to Indian
- UDF_CHAR_4 is set to HR
- UDF_CHAR_5 is set to Permanent
- UDF_CHAR_6 is set to Senior Manager
- UDF_CHAR_7 is set to BG1
- UDF_DATE_1 is set to 01-05-2018
- UDF_DATE_2 is set to 31-05-2018
- Transaction Record Type is set to TR6

For example, the following table illustrates the effective pricing rules which are available during the best fit match:

Transaction Record Type	Primary Pricing Rule Type	Price Item	Price Item Parameters	Pricing Rule	Pricing Start Date	Pricing End Date	Pricing Group	Pricing Group Rule	Price Item Parameters in Pricing Rule	Fees
TR6	ENROLLMENT BASED FEES	PP1	Designation = UDF_CHAR_6, Employee Group = UDF_CHAR_7	PR1	01-01-2018	31-12-2018	PG1	Rule 1 (where Source System = X and Parameter 1 = Western)	Designation = Senior Manager; Employee Group = BG1	$20
								Rule 1 (where Source System = X and Parameter 1 = Western)	Designation = Senior Manager; Employee Group = BG2	$21
								Rule 2 (where Source System = X and Parameter 1 = Eastern)	Designation = Senior Manager; Employee Group = BG1	$18
								Rule 2 (where Source System = X and Parameter 1 = Eastern)	Designation = Senior Manager; Employee Group = BG2	$19
		PP2		PR2	01-01-2018	31-12-2018	PG2	Rule 1 (where Source System = X, Parameter 1 = Eastern, Parameter 2 = Indian, Parameter 3 = HR, and	Designation = Senior Manager; Employee Group = BG2	$5

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Transaction Record Type	Primary Pricing Rule Type	Price Item	Price Item Parameters	Pricing Rule	Pricing Start Date	Pricing End Date	Pricing Group	Pricing Group Rule	Price Item Parameters in Pricing Rule	Fees
								Parameter 4 = Permanent)		
								Rule 1 (where Source System = X, Parameter 1 = Eastern, Parameter 2 = Indian, Parameter 3 = HR, and Parameter 4 = Permanent)	Designation = Senior Manager; Employee Group = BG1	$5
								Rule 2 (where Source System = X, Parameter 1 = Western, Parameter 2 = Indian, Parameter 3 = HR, and Parameter 4 = Permanent)	Designation = Senior Manager; Employee Group = BG2	$6
								Rule 2 (where Source System = X, Parameter 1 = Western, Parameter 2 = Indian, Parameter 3 = HR, and Parameter 4 = Permanent)	Designation = Senior Manager; Employee Group = BG1	$9

Note: Here, the source system is mapped to the **UDF_CHAR_1** field, the parameter 1 is mapped to the **UDF_CHAR_2** field, the parameter 2 is mapped to the **UDF_CHAR_3** field, the parameter 3 is mapped to the **UDF_CHAR_4** field, the parameter 4 is mapped to the **UDF_CHAR_5** field, the coverage start date is mapped to the **UDF_DATE_1** field, and the coverage end date is mapped to the **UDF_DATE_2** field in the ENROLLMENT BASED FEES pricing rule type.

Example 7: Effective Pricing Rule Derivation Using Best Fit Match for Pricing Parameters

In the example 7, the system could not find exact match for the pricing parameters (i.e. Source System = X, Parameter 1 = Western, Parameter 2 = Indian, Parameter 3 = HR, and Parameter 4 = Permanent) in the effective pricing rule for PP1. Therefore, the system searches for the best fit match. While searching for the best fit match, the system rules out the optional parameter 4 (i.e. Parameter 4 = Permanent) and then checks whether the pricing group rule where Source System = X, Parameter 1 = Western, Parameter 2 = Indian, and Parameter 3 = HR exists in the effective pricing rule. If so, it considers the pricing group rule for further processing. If not, the system then rules out the optional parameter 3 (i.e. Parameter 3 = HR) and then checks whether the pricing group rule where Source System = X, Parameter 1 = Western, and Parameter 2 = Indian exists in the effective pricing rule. If so, it considers the pricing group rule for further processing. If not, the system then rules out the optional parameter 2 (i.e. Parameter 2 = Indian) and then checks whether the pricing group rule where Source System = X and Parameter 1 = Western exists in the effective pricing rule. If so, it considers the pricing group rule for further processing. If not, the status of the transaction is changed to **Error**.

In the example 7, the system considers Rule 1 where Source System = X and Parameter 1 = Western as the best fit match in the PR1 pricing rule for PP1. In addition, the employee attributes in the non-retroactive enrollment transaction satisfy the price item parameters (i.e. Designation = Senior Manager and Employee Group = BG1) defined within Rule 1. Therefore, the system fetches PR1 as the effective pricing rule for PP1. In addition, the system fetches PR2 as the effective pricing rule for PP2. The system creates two price item parameter groups - One contains Designation = Senior Manager, Employee Group = BG1, and Pricing Group Rule Parameter = Rule 1 and another contains Designation = Senior Manager, Employee Group = BG1, and Pricing Group Rule Parameter = Rule 2. Once the price item parameter group is created, the system creates the aggregation parameter group. An aggregation parameter group contains all price item parameters included in the pricing rule type for which the parameter usage is set to **Aggregation**.

If the effective pricing rule is not derived for a price item and price item parameters combination or if the account or active contract for the account is not derived, the system does not create a transaction leg for the respective price item.

For example, the following table illustrates that transaction legs are created only when effective pricing rule and account with an active contract are derived for a price item and price item parameters combination:

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Primary Pricing Rule Type	Price Item	Price Item Parameters	Effective Pricing Rule	Account	Active Contract	Transaction Leg
ENROLLMENT BASED FEES	PP1	Designation = UDF_CHAR_6, Employee Status = UDF_CHAR_7	-	-	-	-
	PP2		PR2	-	-	-
	PP3		PR3	A3	C3	TL1
	PP4		-	-	-	-
	PP5		PR5	A2	C1	TL2
	PP6		PR6	A1	-	-

Example 8: No. of Transaction Legs Derived

In the example 8, the system could not find the effective pricing rule for PP1 and PP4, the required account for PP2, and the active contract for PP6 on A1. Therefore, in this case, the system creates two transaction legs - TL1 and TL2 for the enrollment transaction.

If the eligibility rule type is defined of a price item, the system maps the enrollment transaction to the price item when the eligibility rule is satisfied. If the eligibility rule is not satisfied, the system does not consider the price item for billing. For example,

Price Item	Eligibility Criteria Met	Effective Pricing Rule	Account	Active Contract	Transaction Leg
PE1	Yes	PR1	A1	C1	TL1
PE2	-	PR2	-	-	-
PE3	No	-	-	-	-
PE4	Yes	-	-	-	-
PE5	Yes	PR3	A2	-	-
PE6	Yes	PR4	-	-	-

Example 9: Price Item Eligibility for Transaction Leg Derivation

In the example 9, the eligibility criteria was defined for PE1, PE3, PE4, PE5, and PE6. The eligibility criteria was satisfied for PE1, PE4, PE5, and PE6, but not for PE3. Further, the system could not find the effective pricing rule for PE4, the required account for PE2 and PE6, and the active contract for PE5 on A2. Therefore, in this case, the system creates one transaction leg (i.e. TL1) for the enrollment transaction. For more information, refer to the Price Item Eligibility on page 3315 section.

Once a transaction leg is created, the derivation date is set as the processing date corresponding to the transaction leg.

Account and Price Item Derivation (for the Ancillary Pricing Rule Type Category)

The **Validate Transaction and Derive Price Item (C1-TXNIP)** batch maps an ancillary transaction to one or more price item and price item parameters which are defined in the respective primary pricing rule type. This is possible when an algorithm created using the **C1_ACCPRIDRV** algorithm type is attached to the **Account and Price Item Derivation** system event of the primary pricing rule type.

This algorithm fetches the effective pricing rule for each price item and price item parameters combination specified in the primary pricing rule type on the derivation date. The system considers the paid date as the derivation date. This algorithm first searches for the effective pricing rule for a price item and price item parameters combination which is defined for the policy at the bill group level. If the system does not find any effective pricing rule for a price item and

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price item parameters combination which is defined for the policy at the bill group level, it inherits the effective pricing rule for a price item and price item parameters combination from the parent customer level.

For example, if the system receives an ancillary transaction with the following details:

- UDF_CHAR_6 is set to BC1
- UDF_CHAR_7 is set to PASS
- UDF_DATE_1 is set to 15-03-2018
- Transaction Record Type is set to TR1

The following table illustrates how the pricing rules are defined for the ancillary transactions at different assignment levels:

Transaction Record Type	Primary Pricing Rule Type	Price Item	Price Item Parameters	Pricing Rule	Pricing Start Date	Pricing End Date	Pricing Arrangement	Assignment Level
TR1	ANCILLARY	P1	BCHGLINETYPE = UDF_CHAR_6 and PRICINGARRANGEMENT = UDF_CHAR_7	C1P1	01-01-2018	31-12-2018	Pass Through without Markup or Markdown	Parent Customer
				C2P1	01-01-2018	31-12-2018	Pass Through without Markup or Markdown	Bill Group
				C3P1	01-01-2018	31-12-2018	Pass Through without Markup or Markdown	Bill Group
		P2		C1P2	01-06-2017	31-12-2017	Pass Through without Markup or Markdown	Bill Group
				C2P2	01-01-2018	31-12-2018	Pass Through without Markup or Markdown	Parent Customer
				C3P2	01-01-2019	30-06-2019	Pass Through without Markup or Markdown	Bill Group

Note:

Here, the **Pass Through without Markup or Markdown** pricing arrangement identifier is set to **PASS** in the ANCILLARY pricing rule type. This means that the system will consider only effective pricing rules where the pricing arrangement is set to **Pass Through without Markup or Markdown** when the ancillary transaction is received where **UDF_CHAR_7** is set to **PASS**.

Here, the paid date is mapped to the **UDF_DATE_1** field in the ANCILLARY pricing rule type.

Example 1: Effective Pricing Rule Derivation

In the example 1, the system fetches C2P1 and C2P2 pricing rules for P1 and P2, respectively, because of the following reasons:

- The paid date (i.e. 15-03-2018) of the ancillary transaction falls within the C2P1 and C2P2 pricing rules' date range (i.e. 01-01-2018 to 31-12-2018).
- The pricing arrangement is set to **Pass Through without Markup or Markdown** in the C2P1 and C2P2 pricing rules.

Note that the effective pricing rule for P1 is derived at the bill group level, whereas the effective pricing rule for P2 is derived from the parent customer level.

Note: The price item parameters (i.e. BCHGLINETYPE and PRICINGARRANGEMENT) must be defined in the **Billable Charge Line Type Parameter** and **Pricing Arrangement Parameter** option types of the **C1-ASOBLLNG** feature configuration, respectively. Otherwise, erroneous results might occur.

The system then derives the account with a particular invoice type (to which a price item must be billed) based on the priority which is defined for the respective price item in the pricing rule type.

For example, the following table illustrates the accounts to which the charges of P1 and P2 should be billed based on the given priority:

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Price Item	Priority	Invoice Type	Account
P1	10	Standard	A1
	20	Retention	A2
P2	10	Retention	A2
	20	Standard	A1

Example 2: Priority Based Account Derivation

In the example 2, while mapping the claim transaction to P1, the system checks whether an account where the **Invoice Type (C1INVTYP)** characteristic is set to **Standard** exists for the bill group. If so, it considers the standard account (A1) of the bill group for billing. However, if an account where the **Invoice Type (C1INVTYP)** characteristic is set to **Standard** does not exist for the bill group, the system checks whether an account where the **Invoice Type (C1INVTYP)** characteristic is set to **Retention** exists for the bill group. If so, it considers the retention account (A2) of the bill group for billing. If an account where the **Invoice Type (C1INVTYP)** characteristic is set to **Retention** does not exist for the bill group, the status of the transaction is changed to **Error**.

Similarly, while mapping the claim transaction to P2, the system considers the account of the bill group which is available based on the priority. The system derives the billing account for only those price items for which the effective pricing rule is derived.

Note: The characteristic type which indicates the type of account (for example, **C1INVTYP**) must be specified in the **Invoice Type Characteristic Type** option type of the **C1-ASOBLLNG** feature configuration. Otherwise, erroneous results might occur.

Once the account is derived, the system then checks whether the account has one active contract of the contract type which is associated with the price item. If so, it fetches the contract for further processing. Once the effective pricing rule, account, and active contract are derived, the transaction is mapped to the respective price item, price item parameters, and account. A transaction leg is created for each price item, price item parameters, and account combination. For example, if the system receives an ancillary transaction with the following details:

- UDF_CHAR_6 is set to BC1
- UDF_CHAR_7 is set to PASS
- UDF_DATE_1 is set to 15-03-2018
- Transaction Record Type is set to TR1

For example, the following table illustrates how the ancillary transaction legs are created for each price item, price item parameters, and account combination:

Transaction Record Type	Primary Pricing Rule Type	Price Item	Price Item Parameters	Effective Pricing Rule	Pricing Arrangement	Account	Active Contract	Transaction Leg
TR1	ANCILLARY	P1	BCHGLINETYPE = UDF_CHAR_6 and PRICINGARRANGEMENT = UDF_CHAR_7	PR1	Pass Through without Markup or Markdown	A1	C1	TL1
		P2		PR2	Pass Through without Markup or Markdown	A2	C2	TL2
		P3		PR3	Pass Through without Markup or Markdown	A3	C3	TL3

Note: Here, the paid date is mapped to the **UDF_DATE_1** field and the **Pass Through without Markup or Markdown** pricing arrangement identifier is set to **PASS** in the ANCILLARY pricing rule type.

Example 3: Transaction Leg Derivation

In the example 3, the system maps the ancillary transaction to the following price item, price item parameters, and account combinations:

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- Price Item: P1; Price Item Parameter: BCHGLINETYPE = BC1 and PRICINGARRANGEMENT = Pass Through without Markup or Markdown; and Account: A1
- Price Item: P2; Price Item Parameter: BCHGLINETYPE = BC1 and PRICINGARRANGEMENT = Pass Through without Markup or Markdown; and Account: A2
- Price Item: P3; Price Item Parameter: BCHGLINETYPE = BC1 and PRICINGARRANGEMENT = Pass Through without Markup or Markdown; and Account: A3

In the example 3, the system creates three transaction legs - TL1, TL2, and TL3 for the ancillary transaction. Once a transaction leg is created, the respective effective pricing rule is stamped against the transaction leg. In addition, the price item parameters of the transaction leg are grouped. In the example 3, the system creates one price item parameter group which contains the following price item parameters:

- BCHGLINETYPE = BC1
- PRICINGARRANGEMENT = PASS

A group is used to determine the price item pricing. A unique group ID is generated for each group. If a group with a set of price item parameters already exists in the system, a new group is not created. Instead, the existing group is used for determining the price item pricing.

Note: The price item parameter group contains only those price item parameters included in the primary pricing rule type for which the parameter usage is set to **Pricing**.

If a pricing group is used while defining a pricing rule for a bill group, the system fetches the pricing rule for an ancillary transaction when the following conditions are met:

- The paid date of the ancillary transaction falls within the pricing rule's date range.
- The employee attributes specified in the ancillary transaction match the criteria defined in any one of the pricing group rule.
- The pricing arrangement specified in the ancillary transaction matches the pricing arrangement specified in the pricing rule.

Let us understand this with the help of an example. An ancillary transaction is received with the following details:

- UDF_CHAR_1 is set to X
- UDF_CHAR_2 is set to Western
- UDF_CHAR_3 is set to Indian
- UDF_CHAR_4 is set to HR
- UDF_CHAR_5 is set to Permanent
- UDF_CHAR_6 is set to BC1
- UDF_CHAR_7 is set to PASS
- UDF_DATE_1 is set to 26-01-2018
- Transaction Record Type is set to TR6

For example, the following table illustrates an effective pricing rule which is defined using an ancillary pricing rule type and where a pricing group is used:

Transaction Record Type	Primary Pricing Rule Type	Price Item	Price Item Parameters	Pricing Rule	Pricing Start Date	Pricing End Date	Pricing Group	Pricing Group Rule	Pricing Arrangement
TR6	ANCILLARY	P1	BCHGLINETYPE = UDF_CHAR_6 and PRICINGARRANGEMENT = UDF_CHAR_7	PR1	01-01-2018	31-12-2018	PG1	Rule 1 (where Source System = X, Parameter 1 = Western, Parameter 2 = Indian, Parameter 3 = HR, and Parameter 4 = Permanent)	Pass Through without Markup or Markdown
								Rule 2 (where Source System = X, Parameter 1 = Eastern, and Parameter 2 = Indian, Parameter 3 = HR, and Parameter 4 = Permanent)	Pass Through without Markup or Markdown

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Note: Here, the source system is mapped to the **UDF_CHAR_1** field, the parameter 1 is mapped to the **UDF_CHAR_2** field, the parameter 2 is mapped to the **UDF_CHAR_3** field, the parameter 3 is mapped to the **UDF_CHAR_4** field, the parameter 4 is mapped to the **UDF_CHAR_5** field, the paid date is mapped to the **UDF_DATE_1** field, and the **Pass Through without Markup or Markdown** pricing arrangement identifier is set to **PASS** in the ANCILLARY pricing rule type.

Example 4: Effective Pricing Rule is Defined Using a Pricing Group

In the example 4, the system considers the PR1 pricing rule for P1 because of the following reasons:

- The paid date (i.e. 26-01-2018) of the ancillary transaction falls within the PR1 pricing rule's date range (i.e. 01-01-2018 to 31-12-2018).
- The employee attributes specified in the ancillary transaction match the criteria defined in the Rule 1 (i.e. Source System = X, Parameter 1 = Western, Parameter 2 = Indian, Parameter 3 = HR, and Parameter 4 = Permanent).
- The pricing arrangement is set to **Pass Through without Markup or Markdown** within Rule 1 of the PR1 pricing rule.

The system then stores the pricing group rule which is satisfied against a parameter which is defined in the **Pricing Group Rule Parameter** option type of the **C1-ASOBLLNG** feature configuration. In such case, the price item parameter group contains the price item parameters and the pricing group rule parameter. For example, Group A contains BCHGLINETYPE = BC1, PRICINGARRANGEMENT = PASS, and Pricing Group Rule Parameter = Rule 1.

In the example 4, the system could find the exact match for pricing parameters defined in the pricing group rule. However, if the exact match is not available, the system finds the effective pricing rule using the best fit match for the pricing parameters defined in the pricing group rule. Note that the system searches for the exact match in the effective pricing rules at both the bill group and parent customer levels. If the exact match is not available at both the levels, the system finds the effective pricing rule using the best fit match for the pricing parameters (defined in the pricing group rule) first at the bill group level and then at the parent customer level.

Let us understand this with the help of an example. An ancillary transaction is received with the following details:

- UDF_CHAR_1 is set to X
- UDF_CHAR_2 is set to Western
- UDF_CHAR_3 is set to Indian
- UDF_CHAR_4 is set to HR
- UDF_CHAR_5 is set to Permanent
- UDF_CHAR_6 is set to BC1
- UDF_CHAR_7 is set to PASS
- UDF_DATE_1 is set to 31-05-2018
- Transaction Record Type is set to TR6

For example, the following table illustrates the effective pricing rules which are available during the best fit match:

Transaction Record Type	Primary Pricing Rule Type	Price Item	Price Item Parameters	Pricing Rule	Pricing Start Date	Pricing End Date	Pricing Group	Pricing Group Rule	Pricing Arrangement
TR6	ANCILLARY	PP1	BCHGLINETYPE = UDF_CHAR_6 and PRICINGARRANGEMENT = UDF_CHAR_7	PR1	01-01-2018	31-12-2018	PG1	Rule 1 (where Source System = X and Parameter 1= Western)	Pass Through without Markup or Markdown
								Rule 1 (where Source System = X and Parameter 1 = Western)	Pass Through without Markup or Markdown
								Rule 2 (where Source System = X and Parameter 1 = Eastern)	Pass Through without Markup or Markdown
								Rule 2 (where Source System = X and Parameter 1 = Eastern)	Pass Through without Markup or Markdown

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Transaction Record Type	Primary Pricing Rule Type	Price Item	Price Item Parameters	Pricing Rule	Pricing Start Date	Pricing End Date	Pricing Group	Pricing Group Rule	Pricing Arrangement
		PP2		PR2	01-01-2018	31-12-2018	PG2	Rule 1 (where Source System = X, Parameter 1 = Eastern, Parameter 2 = Indian, Parameter 3 = HR, and Parameter 4 = Permanent)	Pass Through without Markup or Markdown
								Rule 1 (where Source System = X, Parameter 1 = Eastern, Parameter 2 = Indian, Parameter 3 = HR, and Parameter 4 = Permanent)	Pass Through without Markup or Markdown
								Rule 2 (where Source System = X, Parameter 1 = Western, Parameter 2 = Indian, Parameter 3 = HR, and Parameter 4 = Permanent)	Pass Through without Markup or Markdown
								Rule 2 (where Source System = X, Parameter 1 = Western, Parameter 2 = Indian, Parameter 3 = HR, and Parameter 4 = Permanent)	Pass Through without Markup or Markdown

Note: Here, the source system is mapped to the **UDF_CHAR_1** field, the parameter 1 is mapped to the **UDF_CHAR_2** field, the parameter 2 is mapped to the **UDF_CHAR_3** field, the parameter 3 is mapped to the **UDF_CHAR_4** field, the parameter 4 is mapped to the **UDF_CHAR_5** field, the paid date is mapped to the **UDF_DATE_1** field, and the **Pass Through without Markup or Markdown** pricing arrangement identifier is set to **PASS** in the ANCILLARY pricing rule type.

Example 5: Effective Pricing Rule Derivation Using Best Fit Match for Pricing Parameters

In the example 5, the system could not find the exact match for the pricing parameters (i.e. Source System = X, Parameter 1 = Western, Parameter 2 = Indian, Parameter 3 = HR, and Parameter 4 = Permanent) in the effective pricing rule for PP1. Therefore, the system searches for the best fit match. While searching for the best fit match, the system rules out the optional parameter 4 (i.e. Parameter 4 = Permanent) and then checks whether the pricing group rule where Source System = X, Parameter 1 = Western, Parameter 2 = Indian, and Parameter 3 = HR exists in the effective pricing rule. If so, it considers the pricing group rule for further processing. If not, the system then rules out the optional parameter 3 (i.e. Parameter 3 = HR) and then checks whether the pricing group rule where Source System = X, Parameter 1 = Western, and Parameter 2 = Indian exists in the effective pricing rule. If so, it considers the pricing group rule for further processing. If not, the system then rules out the optional parameter 2 (i.e. Parameter 2 = Indian) and then checks whether the pricing group rule where Source System = X and Parameter 1 = Western exists in the effective pricing rule. If so, it considers the pricing group rule for further processing. If not, the status of the transaction is changed to **Error**.

In the example 5, the system considers Rule 1 where Source System = X and Parameter 1 = Western as the best fit match in the PR1 pricing rule for PP1. In addition, the pricing arrangement is set to **Pass Through without Markup or Markdown** within Rule 1 of the PR1 pricing rule. Therefore, the system fetches PR1 as the effective pricing rule for PP1. In addition, the system fetches PR2 as the effective pricing rule for PP2. The system creates two price item parameter groups - One contains BCHGLINETYPE = BC1, PRICINGARRANGEMENT = PASS, and Pricing Group Rule Parameter = Rule 1 and another contains BCHGLINETYPE = BC1, PRICINGARRANGEMENT = PASS, and Pricing Group Rule Parameter = Rule 2. Once the price item parameter group is created, the system creates the

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aggregation parameter group. An aggregation parameter group contains all price item parameters included in the related pricing rule type for which the parameter usage is set to **Aggregation**.

If the effective pricing rule is not derived for a price item and price item parameters combination or if the account or active contract for the account is not derived, the system does not create a transaction leg for the respective price item.

For example, the following table illustrates that transaction legs are created only when effective pricing rule and account with an active contract are derived for a price item and price item parameters combination:

Primary Pricing Rule Type	Price Item	Price Item Parameters	Effective Pricing Rule	Account	Active Contract	Transaction Leg
ANCILLARY	PP11	BCHGLINETYPE = UDF_CHAR_6 and PRICINGARRANGEMENT = UDF_CHAR_7	-	-	-	-
	PP12		PR12	A1	C1	TL11
	PP13		PR13	-	-	-
	PP14		PR14	A2	-	-
	PP15		PR15	-	-	-
	PP16		-	-	-	-
	PP17		PR17	A2	C2	TL12

Example 6: No. of Transaction Legs Derived

In the example 6, the system could not find the effective pricing rule for PP11 and PP16, the required account for PP13 and PP15, and the active contract for PP14 on A2. Therefore, in this case, the system creates two transaction legs - TL11 and TL12 for the transaction.

If the eligibility rule type is defined of a price item, the system maps the ancillary transaction to the price item when the eligibility rule is satisfied. If the eligibility rule is not satisfied, the system does not consider the price item for billing. For example,

Price Item	Eligibility Criteria Met	Effective Pricing Rule	Account	Active Contract	Transaction Leg
PE1	Yes	PR1	A1	C1	TL1
PE2	-	PR2	-	-	-
PE3	No	-	-	-	-
PE4	Yes	-	-	-	-
PE5	Yes	PR3	A2	-	-
PE6	Yes	PR4	-	-	-

Example 7: Price Item Eligibility for Transaction Leg Derivation

In the example 7, the eligibility criteria was defined for PE1, PE3, PE4, PE5, and PE6. The eligibility criteria was satisfied for PE1, PE4, PE5, and PE6, but not for PE3. Further, the system could not find the effective pricing rule for PE4, the required account for PE2 and PE6, and the active contract for PE5 on A2. Therefore, in this case, the system creates one transaction leg (i.e. TL1) for the ancillary transaction. For more information, refer to the Price Item Eligibility on page 3315 section.

Once a transaction leg is created, the derivation date is set as the processing date corresponding to the transaction leg.

Bill After Date Determination

Once the billable charges are created for claim, claim based fees, enrollment based fees, and ancillary, the system enables you to automatically stamp the bill after date in these billable charges. The system can automatically stamp the bill after date in these billable charges when an algorithm created using the **C1_BAFTDRV** algorithm type is attached to the

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Bill After Date Determination system event of the respective pricing rule type. This algorithm sets the bill after date to the end date of the aggregation schedule period in which the transaction date falls. Note that the system considers the aggregation schedule specified in the rate option which is defined for the respective price item. Let us understand this with the help of an example. If the claim transaction with the transaction date set to 25-06-2018 is mapped to the following price item and account combinations:

The following table illustrates the schedule periods defined in an aggregation schedule which is specified in the rate option of a price item:

Pricing Rule Type	Price Item	Rate Option	Aggregate Transaction	Aggregation Schedule	Schedule Period	Account	Billable Charge
CLAIM	P1	R01	Yes	Monthly	01-01-2018 - 31-01-2018	A1	BC1
					01-02-2018 - 28-02-2018		
					01-03-2018 - 31-03-2018		
					01-04-2018 - 30-04-2018		
					01-05-2018 - 31-05-2018		
					01-06-2018 - 30-06-2018		
					01-07-2018 - 31-07-2018		
					01-08-2018 - 31-08-2018		
	P2	R01			01-09-2018 - 30-09-2018	A2	BC2
					01-10-2018 - 31-10-2018		
					01-11-2018 - 30-11-2018		
					01-12-2018 - 31-12-2018		
	P3	R02	Yes	Yearly	01-01-2018 - 31-12-2018	A3	BC3

Example 1: Bill After Date Determination Using the Aggregation Schedule

In the example 1, the system stamps 30-06-2018 as the bill after date in the BC1 and BC2 billable charges. This is because the transaction date (i.e. 25-06-2018) falls in the 01-06-2018 - 30-06-2018 period of the R01 aggregation schedule.

However, the system stamps 31-12-2018 as the bill after date in the BC3 billable charge. This is because the transaction date (i.e. 25-06-2018) falls in the 01-01-2018 - 31-12-2018 period of the R02 aggregation schedule.

Note: The bill after date for the specific stop-loss and aggregate stop-loss billable charges is calculated using the settlement frequency in the **Create Specific Stop-Loss Billable Charge (C1-BCSSL)** and **Create Aggregate Stop-Loss Billable Charge (C1-BCASL)** batches, respectively.

Advance Billing for Claim Fund Charge

Until now, the system enabled you to configure the pricing for level funding and generate the claim fund charges for a self-funded employer using either of the following approach:

- Flat level funding
- Enrollment based level funding

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Now, the system enables you to bill the claim fund charges to a self-funded employer in advance. In case of enrollment based level funding, the system can receive the enrollment transactions for the month of January in the month of December. Once the January enrollment transactions are received in December, the system can create claim fund charges based on the January enrollment in the month of December and accordingly bill the self-funded employer. However, the claim fund charges which are billed in the month of December will be adjusted against the claim, ancillary, or other charges which are eligible for level funding only in the month of January.

To enable this feature, you need to do the following:

- **Set the Advance Level Funding Eligibility Option** - A new field named **Advance Level Funding Eligibility** is available while defining a self-funded policy. You can set the value of the **Advance Level Funding Eligibility** field to either **Yes** or **No**. You can define the **Advance Level Funding Eligibility** field only through a health care inbound message and not from the user interface. When you create a self-funded policy from the user interface, the **Advance Level Funding Eligibility** field is non-editable. By default, the value is set to **No**. You can then change the value through a health care inbound message.
- **Set the Advance Billing Option** - A new field named **Advance Billing** is available while defining a retention type enrollment based pricing rule. You can set the value of the **Advance Billing** field to either **Yes** or **No**.
- **Create a Prospective Bill Period** - You need to create a prospective bill period wherein the bill date falls in a month prior to the month of bill segment end date. For example, if the bill segment end date is 01-31-2021, then you can set the bill date to 12-31-2020. You must use the prospective bill period in the recurring flat fee pricing rule using which you want to create the flat claim fund charge which should be billed in advance.

If the **Advance Level Funding Eligibility** field is set to **Y** through a health care inbound message, the system activates the self-funded policy even if the policy start date is later than the inbound processing date. Accordingly, a log is maintained for the self-funded policy.

On renewing a self-funded policy, the system provides the ability to copy the advance level funding eligibility value of the base policy to the renewed policy. A new field named **Copy Advance Level Funding Eligibility** is available while renewing a self-funded policy. If you select the **Copy Advance Level Funding Eligibility** option, the value is copied from the base policy to the renewed policy. If the **Advance Level Funding Eligibility** field is set to **Y** in the base policy, the system activates the renewed self-funded policy on the policy renewal even if the renewed policy's start date is later than the system date.

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

- While accumulating the charges which are eligible for level funding, the system behaves in the following manner:
  - In case of advance flat level funding, the system considers only those claim fund bill segments where the end date is earlier than or equal to the accumulation run date and then adjusts the accumulation amount against those claim fund charges which were billed in the previous bill period.
  - In case of advance enrollment based level funding, the system considers the enrollment transactions based on their coverage end date. Only those enrollment transactions where coverage end date is earlier than or equal to the accumulation run date are accumulated and then adjusted against the claim fund charges which were billed earlier.
- If the **Advance Level Funding Eligibility** field is set to **Y** for a self-funded policy and the inbound processing date is earlier than the policy start date, the system sets the contract start date to the first day of the month in which the inbound message is processed. Otherwise, the contract start date is set to policy start date.
- The system determines the bill after date depending on the value set for the **Advance Billing** field in the retention type enrollment based pricing rule. If the **Advance Billing** field is set to **Yes**, then the bill after date is set to accounting date - 1. Here, the accounting date is fetched from the schedule of the account's bill cycle where the transaction date falls. However, if the **Advance Billing** field is set to **No**, then the bill after date is set to accounting date - 1. Here, the accounting date is fetched from the schedule of the account's bill cycle where the transaction's coverage end date falls.

SSL Accumulation across Bill Groups

Specific Stop-Loss (SSL) protects the self-funded employers against the excess claims from a single individual who is a member in the self-funded policy. Oracle Revenue Management and Billing enables the customers to configure the SSL pricing rules wherein the SSL Limit and SSL Payout Limit are defined. For the excess claims from a member,

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arising on top of the SSL Limit defined for the bill group, the insurer will provide the SSL credits (capped with the SSL Payout Limit) to the self-funded employer.

There can be scenarios in which a member moves from one bill group to another. For example, an employee changes the department or work location. ORMB provides the ability to continue the accumulation of the transaction amount across the bill groups, if both bill groups have the same SSL limit and their accounts have same bill cycle. If the SSL Limits of the bill groups are different or if the bill groups' accounts have different bill cycles, the accumulation is calculated individually for each bill group based on the respective SSL Limit.

To enable the SSL Accumulation across Bill Groups feature, you need to set the **SSL Member Movement Configuration** option type in the **C1-ASOBLLNG** feature configuration to either of the following:

- INDIVIDUAL
- PROPORTIONATE
- CURRENTBG

If you do not set the value for the **SSL Member Movement Configuration** option type in the **C1-ASOBLLNG** feature configuration, by default, it is set to **INDIVIDUAL**.

While accumulating the SSL charges for a member, the system checks whether the member is associated with more than one bill group. If so, the system derives the value from the **SSL Member Movement Configuration** option type of the **C1-ASOBLLNG** feature configuration to determine the manner in which the SSL credits should be given to the bill groups. If the value of the **SSL Member Movement Configuration** option type is set to **PROPORTIONATE**, the system does weighted distribution of the total SSL credits across the associated bill groups based on the cumulative aggregation amount of each bill group. If the value of the **SSL Member Movement Configuration** option type is set to **CURRENTBG**, the system gives the remaining SSL credits to the present bill group irrespective of the bill group for which the transaction is received. If the value of the **SSL Member Movement Configuration** option type is set to **INDIVIDUAL**, the system accumulates the charges which are eligible for SSL and calculates the SSL credits individually for each bill group based on the respective SSL Limit.

Note: In case of a member who has opted for lasering, the system considers the lasered amount instead of the SSL limit during SSL credit calculation.

Trigger Repricing on Deleting Derivation and Pricing Parameters of a Bill Group

Until now, you were able to delete the derivation and pricing parameters of a bill group from the user interface. But repricing was not triggered on the deletion. Now, on deleting a derivation and pricing parameters combination of a bill group, the system changes the status of the derivation and pricing parameters combination to **Inactive**. In addition, if the audit event process is configured for the **C1-BillLevel** business object, the system creates an audit event with the audit action set to **Change Row**.

On executing the **C1-CBIPR** batch, the system creates a repricing entity detail record for the audit event in the **CI_REPRC_ENTITY_DTL** table. While repricing, you need to execute the following batches in the specified sequence:

1. C1-FIBLR
2. C1-FIMRE
3. C1-CBIPR
4. C1-FIMRC
5. C1-REPC1
6. C1-REPC2
7. C1-REPC3
8. C1-FIBCR

Once the repricing entity detail record is created for the audit event, you need to execute the **C1-FIMRC** batch. It will delete the inactivated derivation and pricing parameters combination (that was earlier deleted from the user interface)

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from the system. If the deleted derivation and pricing parameters combination was referred for billing any memberships in the system, you need to ensure that those memberships are appropriately billed to a new bill group and do not remain unbilled in the system.

Note: The **C1-CBIPR** and **C1-FIMRC** batches and **C1-REAUDEVNT** algorithm are enhanced to implement this feature.

Chapter 39

Fully-Insured Pricing

Topics:

- Algorithms for Pricing Rule Types
- Age Based Pricing
- Tier Based Pricing
- Pass-Through Billable Charge
- Additional Fee Pricing for COBRA Membership
- Membership Benefit Pricing
- Medicare Part A, Part B, and Part D Pricing
- Discount Charge Pricing for Retiree Membership
- Pricing Rule Inactivation

A new pricing model is introduced for the fully-insured group and individual businesses. In this pricing model, you can define pricing rules using the pricing rule types. At present, you can define the following pricing rule types for the fully-insured group and individual businesses:

- Age Based
- Tier Based

Note: You cannot define pricing rules using the pass-through billable charge pricing rule types. However, you can directly create SQI based billable charges using a pass-through billable charge pricing rule type. For more information, refer to Pass-Through

- Additional Fee
- Membership Benefit
- Discount Charge

Related Topics

For more information on...	See...
Pricing Parameters	Pricing Parameters on page 49
Age Based Pricing	Age Based Pricing on page 3373
Tier Based Pricing	Tier Based Pricing on page 3392
Pass-Through Billable Charge	Pass-Through Billable Charge on page 3408
Additional Fee Pricing for COBRA Membership	Additional Fee Pricing for COBRA Membership on page 3420
Medicare Part D LIS and LEP Pricing	Membership Benefit Pricing on page 3434
Discount Charge Pricing for Retiree Membership	Discount Charge Pricing for Retiree Membership on page 3447
Pricing Rule Inactivation	Pricing Rule Inactivation on page 3462

Algorithms for Pricing Rule Types

Oracle Revenue Management and Billing facilitates you with the following algorithms that you can use in the relevant pricing rule types to accomplish the desired action:

- C1_ACCPRIMEM on page 3368
- C1-BILLPDRV on page 3369
- C1-BILLRPCR on page 3369
- C1_MEMBGDRV on page 3370
- C1_AGEPREM on page 3370
- C1_AGEBDELG on page 3370
- C1-FICRETBC on page 3370
- C1-AGEPRFC on page 3371
- C1-SKPMNTHPC on page 3371
- C1-DERSUBTR on page 3371
- C1_TIERPREM on page 3371
- C1-TIERPRFC on page 3372
- C1-FIBCBP on page 3372
- C1_MEDIPREM on page 3372
- C1-PRLBCVLD on page 3372

Related Topics

For more information on...	See...
How to associate an algorithm with an age based pricing rule type	Associating an Algorithm with an Age Based Pricing Rule Type on page 3379
How to associate an algorithm with a tier based pricing rule type	Associating an Algorithm with a Tier Based Pricing Rule Type on page 3398
How to associate an algorithm with a pass-through billable charge pricing rule type	Associating an Algorithm with a Pass-Through Billable Charge Pricing Rule Type on page 3411
How to associate an algorithm with an additional fee pricing rule type	Associating an Algorithm with an Additional Fee Pricing Rule Type on page 3424
How to associate an algorithm with a benefit pricing rule type	Associating Algorithms with a Benefit Pricing Rule Type on page 3437
How to associate an algorithm with a discount charge pricing rule type	Associating an Algorithm with a Discount Charge Pricing Rule Type on page 3451

Parent Topic: Fully-Insured Pricing on page 3367

C1_ACCPRIMEM

This algorithm should be configured on Fully-Insured Pricing Rule Types.

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- **For Group** - Based on Price Items and parameters configured on the Pricing Rule Type , available pricing rules for the policy are searched at parent person, policy, plan, state level. If processing Benefit record for benefit sub type has Value Type = 'Flat' and Price = 'N', Get the respective price items from the Benefit Pricing Rule Type based on the eligibility rule evaluation and derive the account of the bill group derived based on Invoice Type provided on Pricing Rule Type Price Item. Account of the bill group is searched with active contract of contract type corresponding to the price item and invoice type characteristic on the account matching the invoice type with priority as mentioned on the Pricing Rule Type for the Price Item.
- **For Individual** - Based on Price Items and parameters configured on the Pricing Rule Type , available pricing rules are searched at health plan level. If processing Benefit record for benefit sub type has Value Type = 'Flat' and Price = 'N', Get the respective price items from the Benefit Pricing Rule Type based on the eligibility rule evaluation and derive the account of the financial responsible person derived based on Invoice Type provided on Pricing Rule Type Price Item. Account of the financial responsible person is searched with active contract of contract type corresponding to the price item and invoice type characteristic on the account matching the invoice type with priority as mentioned on the Pricing Rule Type for the Price Item.
- **For Group and Individual** - If processing Benefit Sub Type is also having Reconciliation Required = Y, then for additional entry, get Reconciliation account id from Benefit Sub Type admin configuration.

  1. Price Item will be used which is provided on Benefit Sub Type in Reconciliation Price Item Code field.
  2. If not provided use then derived price item based on eligibility rule as per existing logic.

C1-BILLPDRV

This algorithm should be attached to the **Account and Price Item Derivation Post-Processing** system event of the pricing rule type. If the billing preference characteristic is defined for the account, this algorithm checks whether the value specified for the billing preference characteristic type is already defined in the system. If so, this algorithm derives the bill period from the **Bill Period** attribute of the billing preference. It then sets the **RECURRING_FLG** column to **BP** (i.e., Bill Period) and **RECURRING_VAL** column to the bill period derived from the billing preference corresponding to the record in the **CI_REPRC_REQ_DTL** table.

Note:

The system considers the characteristic type which is specified in the **Bill Cycle Rule Code** option type of the **C1-ASOBLLNG** feature configuration.

This algorithm is applicable for both fully insured group and fully insured individual lines of business.

Related Topics

For more information on...	See...
Tightly Coupled Bill Cycle and Bill Period through Billing Preference	Tightly Coupled Bill Cycle and Bill Period through Billing Preference on page 3492
How to setup the **C1-ASOBLLNG** feature configuration	Setting the C1-ASOBLLNG Feature Configuration on page 4417

C1-BILLRPCR

This algorithm should be attached to the **Account and Price Item Derivation Post-Processing** system event of the pricing rule type. It creates a timeline for each month of the membership coverage period based on the repricing effective date in the **CI_REPRC_REQ_DTL** table. It refers the derived bill period while creating the timelines for the repricing record.

Before executing the **C1-BILLRPCR** algorithm, the system should execute the **C1-BILLPDRV** algorithm to derive the bill period for the account. Therefore, you should ensure that the **C1-BILLPDRV** algorithm should have higher precedence (i.e., sequence) than the **C1-BILLRPCR** algorithm in the respective pricing rule type.

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Note: This algorithm is applicable for both fully insured group and fully insured individual lines of business.

Related Topics

For more information on...	See...
Bill Period Timeline	Bill Period Timeline on page 3493

C1_MEMBGDRV

This algorithm is responsible:

For Group

1. **Deriving Bill Group** - The algorithm soft parameter for bill levels signifies the bill level characteristic type that should be defined on the membership. The algorithm soft parameter for source system signifies the source system characteristic type that should be defined either on the membership or on policy plan or on policy. The source system characteristic value is determined in following sequence, a) Membership b) Policy plan c) Policy Based on the characteristic values on the membership for bill level 1 to bill level 4 and characteristic value of source system, the bill group and parent customer corresponding to the membership is derived
2. **Deriving Policy** - Policy is derived from the plan to which the membership is linked.

For Individual - For membership of type Individual, Health plan will be populated for membership. When membership status is Pending effectuation or Active, this algorithm derives the Financial Responsible person as bill group person.

C1_AGEPREM

This Algorithm should be configured on Pricing Rule Types for Age based.

Premium is calculated for all the eligible members under the membership. It builds the membership timeline considering the membership dates, member person dates and the effective dates for the repricing request raised for the membership. For each valid timeline, it computes the membership premium for each eligible member based on the base fee and modifiers applicable as per the pricing rule definition.

C1_AGEBDELG

This algorithm returns a list of eligible members for a membership for age based pricing rule type. It uses the relation matrix to identify the main subscriber , spouse and children, after which the main subscriber and spouse are added to the eligible list while the eligible children to be added are identified based on max age of dependent, max number of dependents and order priority i.e. whether to consider the eldest or the youngest children if the max number of dependents exceeds. And if one of the dependent is a new born and the gift days is applicable then after retrieving the no of gift days, the start date is pushed back by the no of gift days.

- **For Group Membership** - The required values will be be fetched from the Characteristics attached on the Pricing Rule Type.
- **For Individual Membership**
  1. The required values like MAX_NUM_OF_DEP, MAX_AGE_LIMIT_OF_DEP, DEP_ORDER_PRIORITY_FLG etc. will be fetched from C1_BUS_RULE_PRC table for that business rule id.
  2. The new born related values like GIFT_DAYS_APPL_SW, GIFT_DAYS will be fetched from C1_BUS_RULE_NEW_BORN table for that business rule id.

C1-FICRETBC

This creates SQI based charges for fully insured services.

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This algorithm is invoked to create charges for both pre-calculated(i.e through inbound) and calculated ones(i.e those calculated based on pricing rules present at plan level). It allows creation of new billable charges(BC) , cancellation of existing charges and modification of end_date of existing charges. If there does exists any BC in billable status for date range under process with same start_date, priceItem, Amount and Membership, only end date of that BC is modified. BC for particular membership and priceItem are deemed to be cancelled if they fall in proposed date range and either have different amount or different start_date. Billable Charges created or updated for calculated charges are updated accordingly in entity 'PriceCalculationDetail' (Table: CI_PRCE_CALC) table and hence allowing those entries to be marked as completed. Pricing Rule Type corresponding to priceItem during inbound billable charge data processing is fetched from entity 'PricingRuleTypePriceitem' (Table: C1_PRC_RULE_TYPE_PRICEITEM) on first found basis.

Inbound billable charge data are processed as per latest billable charge data.

During online invocation from inbound message processing main program, it assumes following: i.BillableChargeLineCharacteristics are not available. j. Each of the BillableChargeLines have same currency code. In case of existing billable charge modification or cancellation, corresponding bill segments(In Case of BC end_date updation, only those bill segments whose date range surpasses billable charge end_date and in case of BC cancellation, all bill segments are covered) are cancelled or deleted based on bill segment status. Billable charge are stamped with priceItem , SQI (fetched from Feature config) and pass through lines in MEMO ONLY state along with other info. Aggregated amount are stamped as service quantity.

Parameter: I. Bill To Type Flg - This is used during insertion of Contract ID in MEMBERSHIP_SA table.

Pre-Requisite: I. Values for option types 'CTME' (Characteristic Type For Membership Id) and 'PRSQ' (Proration SQI) in Feature Configuration 'C1-ASOBLLNG' is required. II. For inbound billable charge data - price Item, Pricing Rule Type of type 'Pass-Through Billable Charge' should be present on Plan.

C1-AGEPRFC

For Group Membership - This algorithm will calculate proration factor and amount for Age based pricing rule based on the configurations done on policy plan.

For Individual Membership - The proration factor and amount will be calculated by considering Proration Type as Daily.

C1-SKPMNTHPC

This algorithm will be used for an fully-insured group account which is configured for skip months using Field Mapping Admin configuration.

The premium amount will get distributed for each month based on the number of skip months configured. When a month is a skip month, the distributed amount for that month is zero. The calculated premium of skip month is divided amongst the remaining non-skip months and the distributed amount for non-skip month is calculated.

C1-DERSUBTR

This algorithm stamps the eligible subscription tier on the membership. It uses the Subscription Tier Structure Attribute defined in the Policy Plan in Group or Health Plan in Individual membership to identify the details to be stamped based on the relation: self, spouse, children and/or dependents identified from the Member Person Relationship. It would derive subscription tier for membership based on bill period configured on the account.

C1_TIERPREM

This Algorithm is to be configured on Pricing Rule Types for Tier based. It builds the membership timeline considering the membership dates and the effective dates for the repricing request raised for the membership. For each valid timeline, it computes the membership premium based on the applicable base fee as per the pricing rule definition.

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C1-TIERPRFC

For Group Membership - This algorithm will calculate proration factor and amount for Tier based pricing rule based on the configurations done on policy plan.

For Individual Membership - The proration factor and amount will be calculated by considering Proration Type as Daily.

C1-FIBCBP

This algorithm takes hard parameters as Account Id and Derivation Date and soft parameters as Char Type to fetch Bill Period for recurring Billable Charge.

Invoice Day Characteristic Type - This characteristic Type is expected to be present to get number of invoice days which in turn find corresponding bill period through LookUp C1_INVOICE_DAY_BILL_PERIOD_FLG.

C1_MEDIPREM

This algorithm is to be configured on Pricing Rule Type for Benefits. It builds the membership timeline considering the membership dates and the effective dates for the repricing request raised for the membership. For each valid timeline, it computes the membership premium based on the applicable base fee as per the Benefit Sub Type admin setup.

The following negotiation logic will be applied to calculate premium amount for Group and individual membership:

1. If the processing is for benefit sub type having Value Type = Flat and Price = N , get the respective effective pre-calculated amounts from the Benefit table.
2. If 'Negate' = Y for this benefit sub type and 'RECON_SW' = N then multiply the amount by -1.
3. If 'Negate' = Y for this benefit sub type and 'RECON_SW' = Y then DO NOT multiply.
4. If 'Negate' = N for this benefit sub type and 'RECON_SW' = N then DO NOT multiply by -1.
5. If 'Negate' = N for this benefit sub type and 'RECON_SW' = Y then multiply the amount by -1.

C1-PRLBCVLD

This algorithm will validate the calculated charge with received pre calculated charge. It will compare the benefit records of the membership with Billable charges created for the membership and validate charge mount with received amount(Here threshold is used for calculation)

If any mismatch found then TO DO is created using provided To Do Type and To Do Role. In invoke() method of this algorithm we will perform following logic:

1. Fetch the benefit records of the Membership using benefit sub type which is having Price = Y and Validate = Y.
2. Fetch billable charges created for the membership.
3. Then compare record by executing below logic:

    a. If mismatch is there for the amount and start date and end date then create a To Do using provided To Do Type and To Do Role with message 'Received Pre Calculated charges for Membership Id % not matches with calculated charges for Price Item % and benefit id % then add the To Do Id on Membership Log.

    b. If start date and end date are matched then:

    - Calculated charge range is receivedMinAmount = Received charge - Threshold amount
    - receivedMaxAmount = Received charge + Threshold Amount

    Check the billable charge Amount outside of receivedMinAmount and receivedMaxAmount then create a To Do using provided To Do Type and To Do Role with message 'Received Pre Calculated charges for Membership Id % not matches with calculated charges for Price Item % and benefit id % then add the To Do Id on Membership Log.

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Age Based Pricing

In the Fully-Insured Pricing, the base rate for premium and fees depend upon the age, member attributes (such as employee type, employee status, etc.) and modifiers (such as tobacco usage, gender, alcohol usage, etc.). Oracle Revenue Management and Billing enables you to offer an age based pricing to a fully-insured group and individual customers. In the Age Based pricing, the premium is calculated for each eligible member based on age, member attributes and modifiers, and then aggregated to derive the total premium for the membership. An age based pricing can be defined using the age based pricing rule. You can define an age based pricing rule for a price item on the policy plan. If the age based pricing rule is defined for a price item on a policy plan, all memberships which belong to the policy plan will inherit the age based pricing from the policy plan. If the system does not find any effective pricing rule for a price item on the policy plan, it inherits the effective pricing rule for the price item from the parent customer level.

You can define an age based pricing rule using an age based pricing rule type. It is the age based pricing rule type which helps the system to determine:

- **C1-PricingRuleAgeBased** Business object using which the age based pricing rule should be created in the system.
- Algorithm which should be triggered for deriving the account and price item for a membership.

  Note: You must create an algorithm using the **C1_ACCPRIMEM** algorithm type and attach it to the **Account and Price Item Derivation** system event.
- Algorithm which should be triggered for deriving the bill period for a membership.

  Note: You must create an algorithm using the **C1-BILLPDRV** algorithm type and attach it to the **Account and Price Item Derivation Post-Processing** system event.
- Algorithm which should be triggered for creating the bill period timeline (based on the derived bill period) for a membership.

  Note: You must create an algorithm using the **C1-BILLRPCR** algorithm type and attach it to the **Account and Price Item Derivation Post-Processing** system event.
- Algorithm which should be triggered for deriving the bill group, parent customer, and policy for a membership.

  Note: You must create an algorithm using the **C1_MEMBGDRV** algorithm type and attach it to the **Bill Group Derivation** system event.
- Algorithm which should be triggered for calculating the age based premium for a membership.

  Note: You must create an algorithm using the **C1_AGEPREM** algorithm type and attach it to the **Premium Calculation** system event.
- Algorithm which should be triggered for identifying eligible member persons for premium calculation.

  Note: You must create an algorithm using the **C1_AGEBDELG** algorithm type and attach it to the **Pricing Rule Pre-Processing** system event.
- Algorithm which should be triggered for calculating the premium for each eligible member person.

  Note: You must create an algorithm using the **C1-FICRETBC** algorithm type and attach it to the **Billable Charge Creation Post Processing** system event.
- Algorithm which should be triggered for deriving the bill period for the account.

  Note: You must create an algorithm using the **C1-AGEPRFC** algorithm type and attach it to the **Pricing Rule Proration Amount Calculation** system event.
- Algorithm which should be triggered to configure skip months for an account.

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> **Note:** You must create an algorithm using the **C1-SKPMNTHPC** algorithm type and attach it to the **Skip Month Premium Calculation (in case you want to use the 9/10 Billing feature)** system event.

- Price items for which you can define age based pricing rules using the age based pricing rule type.
- Rate options that you can use while defining the pricing for the respective price item.
- Type of account to which the respective price item should be billed based on the specified priority.
- Rule type which indicates the rules that should be executed to determine whether the price item is eligible for billing.
- Audit event types of the C1-Membership and C1-PERSON business objects using which the audit event should be created whenever a membership or member person is added, updated, or removed from the policy plan.
- Elements of the C1-Membership and C1-PERSON business objects for which audit event should be created.

> **Note:** You must ensure that either the **Update All** option is selected or the elements listed in the age based pricing rule type are already present in the respective audit event type. Otherwise, erroneous results might occur.

- Members, such as main subscriber, spouse, or children in a membership are eligible for premium calculation.
- Following are the additional dependents attributes which can affect the premium calculation if they are considered as part of pricing rules. These additional attributes are defined as characteristics for the policy plan. You must specify the following characteristic types in the age based pricing rule type:
  - **Maximum Number of Dependents** - This characteristic type stores the maximum number of children which are eligible for premium calculation. You must specify a characteristic type where the characteristic entity is set to **Member Person**, **Membership**, **Policy Plan**, **Policy**, and **State**.
  - **Maximum Age Limit for Maximum Dependent Count** - This characteristic type stores the maximum age limit for children which are eligible for premium calculation. You must specify a characteristic type where the characteristic entity is set to **Member Person**, **Membership**, **Policy Plan**, **Policy**, and **State**.
  - **Maximum Number of Dependents Order Priority** - This characteristic type indicates whether the youngest or eldest children should be considered during premium calculation. Each plan may set a limit to consider the number of dependents, either the eldest or youngest one for premium calculation. You must specify a characteristic type where the characteristic entity is set to **Member Person**, **Membership**, **Policy Plan**, **Policy**, and **State**.
  - **Age Calculation Date Basis** - This characteristic type indicates whether the member person's age should be calculated using the member person's enrollment date or policy's start or renewal date. You must specify a characteristic type where the characteristic entity is set to **Member Person**, **Membership**, **Policy Plan**, **Policy**, and **State**.
  - **Newborn Gift Days** - This characteristic type stores the number of days you want to offer as gift days from the new born child's enrollment date. You must specify a characteristic type where the characteristic entity is set to **Member Person**, **Membership**, **Policy Plan**, **Policy**, and **State**.
  - **Newborn Gift Days Applicability** - This characteristic type indicates whether the gift days should be offered in case of a new born. You must specify a characteristic type where the characteristic entity is set to **Member Person**, **Membership**, **Policy Plan**, **Policy**, and **State**.
  - **Young Adult Max Age Limit** - This characteristic type stores the maximum age limit for young adults which are eligible for premium calculation. You must specify a characteristic type where the characteristic entity is set to **Member Person**, **Membership**, **Policy Plan**, **Policy**, and **State**.
  - **Young Adult Inclusion Applicability** - This characteristic type indicates whether the young adults should be considered during the premium calculation. You must specify a characteristic type where the characteristic entity is set to **Member Person**, **Membership**, **Policy Plan**, **Policy**, and **State**.

Once an age based pricing rule type is defined, you can define age based pricing rules using the age based pricing rule type. Note that, at present, you can define age based pricing rules only through a health care inbound message and not from the user interface. However, you can view the age based pricing rules defined for a policy plan from the **Customer 360° Information** screen. While creating an age based pricing rule through a health care inbound message, you need to specify the following information:

- Entity type (i.e. Policy Plan) and entity ID (i.e. policy plan ID) for which you want to define the age based pricing rule
- Start and end dates of the age based pricing rule
- Age based pricing rule type using which you want to create the age based pricing rule

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- Price Item for which you want to define age based pricing
- Rate option using which the price assignment should be created for the age based pricing rule

> **Note:** If the rate option is not given in the pricing rule data, by default, it is set to a value specified in the **Default Rate Option - Flat** or **Default Rate Option - Percentage** option type of the **C1-ASOBLLNG** feature configuration depending on whether the modifier method is set to **FLAT**, **EXPT** or **INPT**.

- Whether you want to increase or decrease the premium of an eligible member by a flat amount or in percentage based on some modifier attributes (such as tobacco usage, alcohol usage, and so on).
- Age limit and employee attributes for which the base fee is applicable

> **Note:**
>
> The system defines the lower age limit and upper age limit pricing eligibility criteria using the parameter which is specified in the **Age Based Parameter** option type of the **C1-ASOBLLNG** feature configuration.
>
> The employee attributes can be defined as the parameters in the system. These parameters can then be used to define eligibility criteria in the age based pricing. Here, you can use only those parameters where the parameter usage is set to **Pricing Eligibility**.

- Modifiers based on which you want to charge additional or offer discount to an eligible member

> **Note:** The modifiers can be defined as the parameters in the system. These parameters can then be used to define eligibility criteria in the age based pricing. Here, you can use only those parameters where the parameter usage is set to **Pricing Eligibility**.

Once the age based pricing rule is defined for a policy plan, the system creates a price item pricing and price list and then assigns the price item pricing to the price list.

Related Topics

For more information on...	See...
How to define an age based pricing rule type	Defining an Age Based Pricing Rule Type on page 3376
How to add the related pricing rule types in an age based pricing rule type	Adding the Related Pricing Rule Types in an Age Based Pricing Rule Type on page 3378
How to associating an algorithm with an age based pricing rule type	Associating an Algorithm with an Age Based Pricing Rule Type on page 3379
How to add a price item in an age based pricing rule type	Adding a Price Item in an Age Based Pricing Rule Type on page 3382
How to add a price item parameter in an age based pricing rule type	Adding a Price Item Parameter in an Age Based Pricing Rule Type on page 3384
How to define the characteristics for an age based pricing rule type	Defining a Characteristic for an Age Based Pricing Rule Type on page 3384
How to add elements for an audit in an age based pricing rule type	Adding Elements for Audit in an Age Based Pricing Rule Type on page 3385
How to define age based specific additional data in an age based pricing rule type	Defining an Age Based Specific Additional Data in an Age Based Pricing Rule Type on page 3387
How to map characteristic attributes in an age based pricing rule type	Mapping Characteristic Attributes in an Age Based Pricing Rule Type on page 3387
How to edit an age based pricing rule type	Editing an Age Based Pricing Rule Type on page 3389
How to delete an age based pricing rule type	Deleting an Age Based Pricing Rule Type on page 3391

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For more information on...	See...
How to view the age based pricing rule type details	Viewing the Age Based Pricing Rule Type Details on page 3392

Defining an Age Based Pricing Rule Type

Prerequisites

To define an age based pricing rule type, you should have:

- Age based pricing rule type business object defined in the application.
- Age based pricing rule business object defined in the application.
- Pricing rule type category for the age based defined in the application.

Procedure

To define an age based pricing rule type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **P** and then click **Pricing Rule Type**.
   A sub-menu appears.
3. Click the **Add** option from the **Pricing Rule Type** sub-menu.

   The **Select Business Object** screen appears. It contains the following field:

Field Name	Field Description	Mandatory (Yes or No)
Pricing Rule Type Business Object	Used to indicate the business object using which you want to create an age based pricing rule type. **Note:** You can create an age based pricing rule type using the **Age Based Pricing Rule Type** business object.	Yes

Tip: Alternatively, you can access this screen by clicking the **Add** button in the **Page Title** area of the **Pricing Rule Type** screen.

4. Select the **Age Based Pricing Rule Type** option from the **Pricing Rule Type Business Object** list.
5. Click **OK**.

   The **Age Based Pricing Rule Type** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details about an age based pricing rule type.
   - **Related Pricing Rule Type** - Used to define the pricing rule types which are related to the age based pricing rule type.

     Note: The **Related Pricing Rule Type** section appears when the **Primary** check-box is selected.
   - **Algorithms** - Used to associate the algorithms with an age based pricing rule type.
   - **Price Items** - Used to add the price items for which you can define the age based pricing rules using the age based pricing rule type.
   - **Price Item Parameters** - Used to add the price item parameters based on which you want to define the price item pricing.
   - **Characteristics** - Used to define the characteristics for an age based pricing rule type.
   - **Event Management** - Used to configure the audit in an age based pricing rule type.

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- **Age Based Specific Additional Data** - Used to define the age based specific additional data in an age based pricing rule type.
- **Attribute Characteristic Mapping** - Used to map a characteristic attribute in an age based pricing rule type.

The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Pricing Rule Type	Used to specify an age based pricing rule type.	Yes
Description	Used to specify the description for an age based pricing rule type.	Yes
Detailed Description	Used to specify additional information about an age based pricing rule type.	No
Pricing Rule Business Object	Used to indicate the business object using which you want to create an age based pricing rule type. The valid value is: • Age Based Pricing Rule	Yes
Business Object	Indicates the business object using which you are defining an age based pricing rule type.	Not applicable
Status	Used to indicate the status of an age based pricing rule type. The valid values are: • Active • Inactive	Yes
Primary	Used to select the checkbox if the pricing rule type is primary.	No
Skip Non-Members	Used to select the checkbox when you want the system to only consider the eligible members and not non-members of the active employee coverage membership during age based premium calculation.	No
Pricing Rule Type Category	Used to indicate the category to which the pricing rule type belongs. The valid value is: • Age Based	Yes

6. Enter the required details in the **Main** section.
7. Add the related pricing rule types in the age based pricing rule type, if required.

Note: The **Related Pricing Rule Type** section appears when the **Primary** check-box is selected.

8. Associate the required algorithms with the age based pricing rule type.
9. Add the required price items in an age based pricing rule type.
10. Add the price item parameters in an age based pricing rule type, if required.
11. Define characteristics for an age based pricing rule type, if required.
12. Configure the audit in an age based pricing rule type.
13. Define an age based specific additional data in an age based pricing rule type.
14. Map a characteristic attribute in an age based pricing rule type
15. Click **Save**.
    The age based pricing rule type is defined.

Related Topics

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For more information on...	See...
How to add the related pricing rule types in an age based pricing rule type	Adding the Related Pricing Rule Types in an Age Based Pricing Rule Type on page 3378
How to associate algorithms with an age based pricing rule type	Associating an Algorithm with an Age Based Pricing Rule Type on page 3379
How to add price items in an age based pricing rule type	Adding a Price Item in an Age Based Pricing Rule Type on page 3382
How to add price item parameters in an age based pricing rule type	Adding a Price Item Parameter in an Age Based Pricing Rule Type on page 3384
How to define characteristics for an age based pricing rule type	Defining a Characteristic for an Age Based Pricing Rule Type on page 3384
How to add elements for audit in an age based pricing rule type	Adding Elements for Audit in an Age Based Pricing Rule Type on page 3385
How to define age based specific additional data in an age based pricing rule type	Defining an Age Based Specific Additional Data in an Age Based Pricing Rule Type on page 3387
How to map characteristic attributes in an age based pricing rule type	Mapping Characteristic Attributes in an Age Based Pricing Rule Type on page 3387

Adding the Related Pricing Rule Types in an Age Based Pricing Rule Type

Prerequisites

To add related pricing rule types in an age based pricing rule type, you should have:

- Additional fee pricing rule type defined in the application.
- Eligibility rule type defined in the application.

Procedure

To add related pricing rule types in an age based pricing rule type:

1. Ensure that the **Related Pricing Rule Types** section is expanded when you are defining or editing an age based pricing rule type.

   Note: This section appears when the **Primary** option is selected in the **Main** section.

   The **Related Pricing Rule Types** section contains the following columns in a grid:

Column Name	Column Description	Mandatory (Yes or No)
Sequence	Used to specify the order in which the related pricing rule type should be invoked.	Yes (Conditional) **Note:** This field is required when you are defining a pricing rule type for the related pricing rule type.
Pricing Rule Type	Used to specify the pricing rule type which should be executed to determine whether the related pricing rule type is eligible for deriving the transaction legs.	Yes (Conditional)

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Column Name	Column Description	Mandatory (Yes or No)
	Note: On clicking the **Search** (🔍) icon that appears corresponding to the **Pricing Rule Type** field, the **Pricing Rule Type Search** window appears. On specifying the related pricing rule type, the description of the pricing rule type appears corresponding to the **Pricing Rule Type** field.	**Note:** This field is required when the corresponding **Sequence** and **Eligibility Rule Type** field is specified for the related pricing rule type.
Eligibility Rule Type	Used to indicate the rule type eligibility for the related pricing rule type. **Note:** The **Eligibility Rule Type** list includes only those rule-types where the rule type eligibility is **Related Pricing Rule Type Eligibility**.	No

2. Enter the required details in the **Related Pricing Rule Types** section.
3. If you want to define more than one related pricing rule type for the age based pricing rule type, click the **Add** (+) icon and then repeat step 2.

Note: However, if you want to remove a related pricing rule type from the age based pricing rule type, click the **Delete** (🗑) icon corresponding to the related pricing rule type.

4. Click **Save**.
   The related pricing rule types are added for the age based pricing rule type.

Related Topics

For more information on...	See...
How to define a fully-insured age based pricing rule type	Defining an Age Based Pricing Rule Type on page 3376
How to define a fully-insured tier based pricing rule type	Defining a Tier Based Pricing Rule Type on page 3394
How to edit a fully-insured age based pricing rule type	Editing an Age Based Pricing Rule Type on page 3389
How to edit a fully-insured tier based pricing rule type	Editing a Tier Based Pricing Rule Type on page 3405

Associating an Algorithm with an Age Based Pricing Rule Type

Prerequisites

To associate algorithm with an age based pricing rule type, you should have:

- An algorithm defined using the **C1_ACCPRIMEM** algorithm type.
- An algorithm defined using the **C1-BILLPDRV** algorithm type.
- An algorithm defined using the **C1-BILLRPCR** algorithm type.
- An algorithm defined using the **C1_MEMBGDRV** algorithm type.
- An algorithm defined using the **C1_AGEPREM** algorithm type.
- An algorithm defined using the **C1_AGEBDELG** algorithm type.

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- An algorithm defined using the **C1-FICRETBC** algorithm type.
- An algorithm defined using the **C1-AGEPRFC** algorithm type.
- An algorithm defined using the **C1-SKPMNTHPC** algorithm type.

Procedure

To associate algorithms with an age based pricing rule type:

1. Ensure that the **Algorithms** section is expanded when you are defining or editing the age based pricing rule type.

   The **Algorithms** section contains the following columns in a grid:

Column Name	Column Description	Mandatory (Yes or No)
System Event	Used to indicate the system event when you want to invoke the algorithm. The valid values are: • **Account and Price Item Derivation** - Used to derive the account and price item for a membership. • **Account and Price Item Derivation Post-Processing** - Used to derive the bill period for the account. • **Account and Price Item Derivation Post-Processing** - Used to create the bill period timeline for the account. • **Bill Group Derivation** - Used to derive the bill group, parent customer, and policy for a membership. • **Premium Calculation** - Used to calculate the premium for each eligible member person. • **Pricing Rule Pre-Processing** - Used to identify the eligible member persons for premium calculation. • **Billable Charge Creation Post Processing** - Used to create new billable charges for both pre-calculated and post-calculated charges. • **Pricing Rule Proration Amount Calculation** - Used to calculate proration factor and amount for age based pricing rule based on the policy plan configurations. • **Skip Month Premium Calculation (in case you want to use the 9/10 Billing feature)** - Used to distribute the total premium in the non-skip months of the coverage period.	Yes **Note:** This field is required when you are associating an algorithm with the age based pricing rule type.
Sequence	Used to specify the order in which the algorithms for each system event must be executed.	Yes (Conditional) **Note:** This field is required when you are associating an algorithm with the age based pricing rule type.
Algorithm	Used to specify the algorithm.	Yes (Conditional)

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Column Name	Column Description	Mandatory (Yes or No)
	Note: Once you select the system event, the **Search** (🔍) icon appears corresponding to the **Algorithm** field. On clicking the **Search** (🔍) icon, the **Algorithm Search** window appears. On specifying the algorithm, the description of the algorithm appears corresponding to the **Algorithm** field.	**Note:** This field is required when you are associating an algorithm with the age based pricing rule type.

2. Enter the following details in the **Algorithms** section:

System Event	Algorithm	Algorithm Type	Description
Account and Price Item Derivation	C1_ACCPRIMEM	C1_ACCPRIMEM	Account and Price Item Derivation for Membership
Account and Price Item Derivation Post-Processing	C1-BILLPDRV	C1-BILLPDRV	Bill Period Derivation
Account and Price Item Derivation Post-Processing	C1-BILLRPCR	C1-BILLRPCR	Bill Period Time Line Creation
Bill Group Derivation	C1_MEMBGDRV	C1_MEMBGDRV	Bill Group Derivation for Membership
Premium Calculation	C1_AGEPREM	C1_AGEPREM	Age Based Premium Calculation
Pricing Rule Pre-Processing	C1_AGEBDELG	C1_AGEBDELG	Get Eligible Member Details from Membership
Billable Charge Creation Post Processing	C1-FICRETBC	C1-FICRETBC	Fully Insured Pass through Billable Charge Creation
Pricing Rule Proration Amount Calculation	C1-AGEPRFC	C1-AGEPRFC	Calculate Proration Factor for Age Based Pricing Rule
Skip Month Premium Calculation (in case you want to use the 9/10 Billing feature)	C1-SKPMNTHPC	C1-SKPMNTHPC	Skip Month Premium Calculation

3. If you want to associate more than one algorithm with the age based pricing rule type, click the **Add** (+) icon and then repeat step 2.

Note: However, if you want to disassociate an algorithm from the age based pricing rule type, click the **Delete** (🗑) icon corresponding to the algorithm.

4. Click **Save**.
   The algorithms are associated with the age based pricing rule type.

Related Topics

For more information on...	See...
How to define an age based pricing rule type	Defining an Age Based Pricing Rule Type on page 3376
How to edit an age based pricing rule type	Editing an Age Based Pricing Rule Type on page 3389

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Adding a Price Item in an Age Based Pricing Rule Type

Prerequisites

To add a price item in an age based pricing rule type, you should have:

- Price item defined in the application
- Rate option defined in the **Rate Option (C1-ExtLookRetTypeRateOpt)** extendable lookup
- Values defined for the **Invoice Type (C1INVTYP)** characteristic type
- The **C1INVTYP** characteristic type set in the **Invoice Type Characteristic Type** option type of the **C1-ASOBLLNG** feature configuration
- Rule types defined in the application (where the rule type usage is set to **Price Item Eligibility**)

Procedure

To add a price item in an age based pricing rule type:

1. Ensure that the **Price Items** section is expanded when you are defining or editing an age based pricing rule type.

   The **Price Items** section contains the following fields in a grid:

<table>
<tr><th>Field Name</th><th>Field Description</th><th>Mandatory (Yes or No)</th></tr>
<tr><td rowspan="3">Price Item</td><td>Used to indicate the price item that you want to include in the age based pricing rule type.</td><td>Yes (Conditional)</td></tr>
<tr><td>Note:
The Search (🔍) icon appears corresponding to the Price Item field. On clicking the Search icon, the Price Item Search window appears.
On specifying the price item, the description of the price item appears corresponding to the Price Item field.</td><td>Note: This field is required when you are adding a rate option and bill to account in an age based pricing rule type.</td></tr>
<tr><td></td><td></td></tr>
<tr><td>Rate Option</td><td>Used to indicate one or more rate options which are valid for a price item.
On clicking the Add (➕) icon, the following field appears in a grid:
<table>
<tr><th>Field Name</th><th>Field Description</th><th>Mandatory (Yes or No)</th></tr>
<tr><td>Rate Option</td><td>Used to indicate the rate option that you want to use while defining pricing for the price item.</td><td>Yes</td></tr>
</table>
Note:
If you want to define more than one rate option to the price item in an age based pricing rule type, click the Add (+) icon.
However, if you want to remove a price item from an age based pricing rule type, click the Delete (🗑) icon corresponding to the Rate Option field.</td><td>Not applicable</td></tr>
<tr><td>Bill To Account</td><td>Used to indicate a order in which the account should be considered while deriving a transaction leg.</td><td>Not applicable</td></tr>
</table>

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<table>
<tr><th>Field Name</th><th>Field Description</th><th>Mandatory (Yes or No)</th></tr>
<tr><td></td><td>On clicking the Add (+) icon, the following fields appear in a grid:
<table>
<tr><th>Field Name</th><th>Field Description</th><th>Mandatory (Yes or No)</th></tr>
<tr><td>Priority</td><td>Used to specify the order in which the invoice type is considered for a price item.</td><td>Yes</td></tr>
<tr><td>Invoice Type</td><td>Used to indicate the type which is considered for billing. For more information, refer to the Bill Group's Account on page 13 section.

Note: The Search (search) icon appears corresponding to the Invoice Type field. On clicking the Search icon, the Invoice Type Search window appears.</td><td>Yes</td></tr>
</table>
Note:
If you want to define more than one invoice type to the price item in an age based pricing rule type, click the Add (+) icon.
However, if you want to remove a invoice type from the price item in an age based pricing rule type, click the Delete (delete) icon corresponding to the Priority field.</td><td></td></tr>
<tr><td>Eligibility Rule Type</td><td>Used to indicate the rule type (which indicates the rules) that should be executed to determine whether the price item is eligible for billing.</td><td>No</td></tr>
</table>

2. Enter the required details in the **Price Items** section.
3. If you want to define more than one price item in an age based pricing rule type, click the **Add** (+) icon and then repeat step 2.

Note: However, if you want to remove a price item from an age based pricing rule type, click the **Delete** (delete) icon corresponding to the **Price Item** field.

4. Click **Save**.
   The price items are added for an age based pricing rule type.

Related Topics

For more information on...	See...
How to define an age based pricing rule type	Defining an Age Based Pricing Rule Type on page 3376
How to edit an age based pricing rule type	Editing an Age Based Pricing Rule Type on page 3389

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Adding a Price Item Parameter in an Age Based Pricing Rule Type

Prerequisites

To add a price item parameter in an age based pricing rule type, you should have:

- Parameter defined in the application where parameter usage is set to **Price Item**.
- Parameter associated with the price item.

Procedure

To add a price item parameter in an age based pricing rule type:

1. Ensure that the **Price Item Parameters** section is expanded when you are defining *o*r editing an age based pricing rule type.

   The **Price Item Parameters** section contains the following fields in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Price Item Parameter	Used to specify the parameter which you can use while defining an age based pricing for the price item.	Yes (Conditional)
	Note: The **Search** (🔍) icon appears corresponding to the **Price Item Parameter** field. On clicking the **Search** (🔍) icon corresponding to the **Price Item Parameter** field, the **Parameter Search** window appears. On specifying the parameter, the description of the price item parameter appears corresponding to the **Price Item Parameter** field.	**Note:** This field is required when you are adding a price item parameter in an age based pricing rule type.

2. Enter the required details in the **Price Item Parameters** section.
3. If you want to add more than one price item parameter in an age based pricing rule type, click the **Add** (+) icon and then repeat step 2.

   Note: However, if you want to remove a price item parameter from an age based pricing rule type, click the **Delete** (🗑) icon corresponding to the price item parameter.

4. Click **Save**.
   The price item parameter is added for an age based pricing rule type.

Related Topics

For more information on...	See...
How to define an age based pricing rule type	Defining an Age Based Pricing Rule Type on page 3376
How to edit an age based pricing rule type	Editing an Age Based Pricing Rule Type on page 3389

Defining a Characteristic for an Age Based Pricing Rule Type

Prerequisites

To define a characteristic for an age based pricing rule type, you should have:

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- Characteristic types defined in the application (where the characteristic entity is set to **Pricing Rule Type**)

Procedure

To define a characteristic for an age based pricing rule type:

1. Ensure that the **Characteristics** section is expanded when you are defining *or* editing an age based pricing rule type.

   The **Characteristics** section contains the following columns in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Characteristic Type	Used to indicate the characteristic type.	Yes (Conditional)
	Note: The list includes only those characteristic types where the characteristic entity is set to **Pricing Rule Type**.	**Note:** This field is required when you are defining a characteristic for an age based pricing rule type.
Characteristic Value	Used to specify the value for the characteristic type.	Yes (Conditional)
	Note: If you select a predefined characteristic type, the **Search** (🔍) icon appears corresponding to the **Characteristic Value** field. On clicking the **Search** icon, the **Predefined Characteristic Search** window appears. On specifying the value for a predefined characteristic type, the description of the characteristic value appears corresponding to the **Characteristic Value** field.	**Note:** This field is required when you are defining a characteristic for an age based pricing rule type.

2. Enter the required details in the **Characteristics** section.
3. If you want to define more than one characteristic for an age based pricing rule type, click the **Add** (+) icon and then repeat step 2.

   Note: However, if you want to remove a characteristic from an age based pricing rule type, click the **Delete** (🗑) icon corresponding to the characteristic.

4. Click **Save**.
   The characteristics are defined for an age based pricing rule type.

Related Topics

For more information on...	See...
How to define a fully-insured age based pricing rule type	Defining an Age Based Pricing Rule Type on page 3376
How to edit a fully-insured age based pricing rule type	Editing an Age Based Pricing Rule Type on page 3389

Adding Elements for Audit in an Age Based Pricing Rule Type

Prerequisites

To add elements for audit in an age based pricing rule type, you should have:

- Business Object **C1-AuditEventType** defined for the pricing rule type.
- Audit Event Type defined in the application.

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Procedure

To add elements for audit in an age based pricing rule type:

1. Ensure that the **Event Management** section is expanded when you are defining *o*r editing an age based pricing rule type.

   The **Event Management** section contains the following fields in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Audit Event Type	Used to specify the audit event type which you can use while adding elements for audit in an age based pricing rule type. **Note:** The **Search** (🔍) icon appears corresponding to the **Audit Event Type** field. On clicking the **Search** (🔍) icon corresponding to the **Audit Event Type** field, the **Audit Event Type Search** window appears. On specifying the audit event type, the description of the audit event type appears corresponding to the **Audit Event Type** field.	Yes
Element Type	Used to indicate the type of audit element for an age based pricing rule type. The valid values are: • Business Object Status • Characteristic • Field	Not applicable
Element Name	Used to specify the element name for an age based pricing rule type. **Note:** The **Search** (🔍) icon appears corresponding to the **Element Name** field. On clicking the **Search** (🔍) icon corresponding to the **Element Name** field, the **Audit Event Type Element Name Search** window appears.	Yes
Element Value	Used to specify the value for an element name.	Not applicable

2. Enter the required details in the **Price Item Parameters** section.
3. If you want to add more than one element for audit in an age based pricing rule type, click the **Add** (+) icon and then repeat step 2.

   Note: However, if you want to remove an element for audit from an age based pricing rule type, click the **Delete** (🗑) icon corresponding to the price item parameter.

4. Click **Save**.
   The elements for audit are added for an age based pricing rule type.

Related Topics

For more information on...	See...
How to define an age based pricing rule type	Defining an Age Based Pricing Rule Type on page 3376

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For more information on...	See...
How to edit an age based pricing rule type	Editing an Age Based Pricing Rule Type on page 3389

Defining an Age Based Specific Additional Data in an Age Based Pricing Rule Type

Procedure

To define an age based specific additional data in an age based pricing rule type:

1. Ensure that the **Age Based Specific Additional Data** section is expanded when you are defining or editing an age based pricing rule type.

   The **Age Based Specific Additional Data** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Relation	Used to indicate the relation of the member in an age based pricing rule type. The valid values are: • Children • Main Subscriber • Spouse	No
Relationship Type	Used to indicate the type of relationship for an age based pricing rule type.	No

2. Enter the required details in the **Age Based Specific Additional Data** section.
3. If you want to add more than one age based specific data in an age based pricing rule type, click the **Add** (+) icon and then repeat step 2.

> **Note:** However, if you want to remove an age based specific data from an age based pricing rule type, click the **Delete** (🗑) icon corresponding to the **Relation** field.

4. Click **Save**.
   The age based specific additional data is defined for the age based pricing rule type.

Related Topics

For more information on...	See...
How to define an age based pricing rule type	Defining an Age Based Pricing Rule Type on page 3376
How to edit an age based pricing rule type	Editing an Age Based Pricing Rule Type on page 3389

Mapping Characteristic Attributes in an Age Based Pricing Rule Type

Prerequisites

To map the characteristic attributes in an age based pricing rule type:

- Characteristic type defined in the application

Procedure

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To map the characteristic attributes in an age based pricing rule type:

1. Ensure that the **Attribute Characteristic Mapping** section is expanded when you are defining an age based pricing rule type.

   The **Attribute Characteristic Mapping** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Maximum Number of Dependents	Used to indicate the maximum number of children which are eligible for premium calculation.	No
Maximum Age Limit for Maximum Dependent Count	Used to indicate the maximum age limit for children which are eligible for premium calculation.	No
Maximum Number of Dependents Order Priority	Used to indicate whether you want to consider the youngest or eldest children during premium calculation. The valid values are: • **YOUNGEST** • **ELDEST**	No
Age Calculation Based On	Used to indicate whether the member person's age should be calculated using the member person's enrollment date or policy's renewal date.	No
Age Recalculation Based On	Used to indicate whether the member person's age should be re-calculated when you add a membership to a policy plan or a member person to a membership.	No
Newborn Gift Days	Used to indicate the number of days you want to offer as gift days from the new born child's enrollment date. As a result, no premium will be calculated for this period.	No
Newborn Gift Days Applicability	Used to indicate whether you want to offer gift days in case of a new born. The valid values are: • **Y** • **N**	No
Young Adult Maximum Age Limit	Used to indicate the maximum age limit for young adults who are eligible for premium calculation.	No
Young Adult Inclusion Applicability	Used to indicate whether you want to consider the young adults during the premium calculation.	No

   Note:

   The **Search** (🔍) icon appears corresponding to each field. On clicking the **Search** icon, the **Characteristic Type Search** window appears.

   On specifying the characteristic type, the description of the characteristic type appears corresponding to the respective field.

2. Enter the required details in the **Attributes Characteristic Mapping** section.
3. Click **Save**.
   The characteristic types are mapped to the appropriate fields in the age based pricing rule type.

Related Topics

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For more information on...	See...
How to define an age based pricing rule type	Defining an Age Based Pricing Rule Type on page 3376
How to edit an age based pricing rule type	Editing an Age Based Pricing Rule Type on page 3389

Editing an Age Based Pricing Rule Type

Prerequisites

To edit an age based pricing rule type, you should have:

- Age based pricing rule type business object defined in the application.
- Age based pricing rule business object defined in the application.

Procedure

To edit an age based pricing rule type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **P** and then click **Pricing Rule Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Pricing Rule Type** sub-menu.
   The **Pricing Rule Type** screen appears.
4. In the **Pricing Rule Type List** zone, click the **Edit** (✎) icon in the **Edit** column corresponding to the age based pricing rule type whose details you want to edit.

   The **Age Based Pricing Rule Type** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details about an age based pricing rule type.
   - **Related Pricing Rule Type** - Used to specify the pricing rule types which are related to the age based pricing rule type.

     Note: The **Related Pricing Rule Type** section appears when the **Primary** check-box is selected.
   - **Algorithms** - Used to associate the algorithms with an age based pricing rule type.
   - **Price Items** - Used to add the price items for which you can define the age based pricing rules using the age based pricing rule type.
   - **Price Item Parameters** - Used to add the price item parameters based on which you want to define the price item pricing.
   - **Characteristics** - Used to define the characteristics for an age based pricing rule type.
   - **Event Management** - Used to configure the audit in an age based pricing rule type.
   - **Age Based-Specific Additional Data** - Used to define an age based specific additional data in an age based pricing rule type.
   - **Attributes Characteristic Mapping** - Used to map a characteristic attribute in an age based pricing rule type.

   The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Pricing Rule Type	Displays the age based pricing rule type.	Not applicable
Description	Used to specify the description for an age based pricing rule type.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
Detailed Description	Used to specify additional information about an age based pricing rule type.	No
Pricing Rule Business Object	Used to indicate the business object using which you want to create an age based pricing rule type. The valid value is: • Age Based Pricing Rule	Yes
Business Object	Indicates the business object using which you are defining an age based pricing rule type.	Not applicable
Status	Used to indicate the status of an age based pricing rule type. The valid values are: • Active • Inactive	Yes
Primary	Used to select the checkbox if the pricing rule type is primary. **Note:** The checkbox appears selected, if you have already selected the **Primary** option while defining an age based pricing rule type.	No
Skip Non-Members	Used to select the checkbox when you want the system to only consider the eligible members and not non-members of the active employee coverage membership during the age based premium calculation. **Note:** The checkbox appears selected, if you have already selected the **Non-Covered Subscriber Eligible** option while defining an age based pricing rule type.	No
Pricing Rule Type Category	Indicates the pricing rule type category for an age based pricing rule type. The valid values is: • Age Based **Note:** It is a read-only field.	No

Tip: Alternatively, you can edit the details of an age based pricing rule type by clicking the **Edit** button in the **Pricing Rule Type** zone.

5. Modify the details in the **Main** section.
6. Add, edit, or remove the related pricing rule types in the age based pricing rule type, if required.

Note: The **Related Pricing Rule Type** section appears when the **Primary** check-box is selected.

7. Associate the required algorithms in an age based pricing rule type.
8. Add, edit, or remove the required price items in an age based pricing rule type.
9. Add, edit, or remove the price item parameters in an age based pricing rule type, if required.
10. Add, edit, or remove characteristics for an age based pricing rule type, if required.
11. Add, edit, or remove the configuration details of the audit in an age based pricing rule type.
12. Add, edit, or remove the age based specific additional data in an age based pricing rule type.
13. Add, edit, or remove a characteristic attribute in an age based pricing rule type

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14. Click **Save**.
    The changes made to the age based pricing rule type are saved.

Related Topics

For more information on...	See...
How to add the related pricing rule types in an age based pricing rule type	Adding the Related Pricing Rule Types in an Age Based Pricing Rule Type on page 3378
How to associate algorithms with an age based pricing rule type	Associating an Algorithm with an Age Based Pricing Rule Type on page 3379
How to add price items in an age based pricing rule type	Adding a Price Item in an Age Based Pricing Rule Type on page 3382
How to add price item parameters in an age based pricing rule type	Adding a Price Item Parameter in an Age Based Pricing Rule Type on page 3384
How to define a characteristic for an age based pricing rule type	Defining a Characteristic for an Age Based Pricing Rule Type on page 3384
How to add elements for audit in an age based pricing rule type	Adding Elements for Audit in an Age Based Pricing Rule Type on page 3385
How to define age based specific additional data in an age based pricing rule type	Defining an Age Based Specific Additional Data in an Age Based Pricing Rule Type on page 3387
How to map characteristic attributes in an age based pricing rule type	Mapping Characteristic Attributes in an Age Based Pricing Rule Type on page 3387

Deleting an Age Based Pricing Rule Type

Procedure

To delete an age based pricing rule type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **P** and then click **Pricing Rule Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Pricing Rule Type** sub-menu.
   The **Pricing Rule Type** screen appears.
4. In the **Pricing Rule Type List** zone, click the **Delete** (🗑) icon in the **Delete** column corresponding to the age based pricing rule type that you want to delete.
   A message appears confirming whether you want to delete the age based pricing rule type.

   Note: You can delete an age based pricing rule type when it is not yet used in the system.

   Tip: Alternatively, you can delete an age based pricing rule type by clicking the **Delete** button in the **Pricing Rule Type** zone.
5. Click **OK**.
   The age based pricing rule type is deleted.

Related Topics

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For more information on...	See...
Pricing Rule Type screen	Pricing Rule Type on page 2942
Pricing Rule Type List zone	Pricing Rule Type List on page 2943
Pricing Rule Type zone	Pricing Rule Type on page 2946

Viewing the Age Based Pricing Rule Type Details

Procedure

To view the details of an age based pricing rule type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **P** and then click **Pricing Rule Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Pricing Rule Type** sub-menu.
   The **Pricing Rule Type** screen appears.
4. In the **Pricing Rule Type List** zone, click the **Broadcast** (ᯤ) icon corresponding to the age based pricing rule type whose details you want to view.
   The **Pricing Rule Type** zone appears.
5. View the details of the age based pricing rule type in the **Pricing Rule Type** zone.

Related Topics

For more information on...	See...
Pricing Rule Type screen	Pricing Rule Type on page 2942
Pricing Rule Type List zone	Pricing Rule Type List on page 2943
Pricing Rule Type zone	Pricing Rule Type on page 2946

Tier Based Pricing

The standard tier based pricing structure contains different tiers, such as Employee Only (E), Employee + Spouse (ES), Family (F), Employee + Children (EC). A main subscriber can subscribe his/her dependents to a policy plan and may fall in one of the tier. The fee for a price item can vary based on the membership tier level and employee attributes (such as employee type, employee status, etc.). Oracle Revenue Management and Billing enables you to offer a tier based pricing to a fully-insured group customer. In the Tier Based pricing, the premium for the membership is derived based on tier level and employee attributes.

A tier based pricing can be defined using the tier based pricing rule. You can define a tier based pricing rule for a price item on the policy plan. If the tier based pricing rule is defined for a price item on a policy plan, all memberships which belong to the policy plan will inherit the tier based pricing from the policy plan. If the system does not find any effective pricing rule for a price item on the policy plan, it inherits the effective pricing rule for the price item from the parent customer level.

You can define a tier based pricing rule using a tier based pricing rule type. It is the tier based pricing rule type which helps the system to determine:

- Business object using which the tier based pricing rule should be created in the system.
- Algorithm which should be triggered for deriving the account and price item for a membership.

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> **Note:** You must create an algorithm using the **C1_ACCPRIMEM** algorithm type and attach it to the **Account and Price Item Derivation** system event.

- Algorithm which should be triggered for deriving the bill period for a membership.

> **Note:** You must create an algorithm using the **C1-BILLPDRV** algorithm type and attach it to the **Account and Price Item Derivation Post-Processing** system event.

- Algorithm which should be triggered for creating the bill period timeline (based on the derived bill period) for a membership.

> **Note:** You must create an algorithm using the **C1-BILLRPCR** algorithm type and attach it to the **Account and Price Item Derivation Post-Processing** system event.

- Algorithm which should be triggered for deriving the subscription tier for membership, based on the bill period configured on the account..

> **Note:** You must create an algorithm using the **C1-DERSUBTR** algorithm type and attach it to the **Account and Price Item Derivation Post-Processing** system event.

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

> **Note:** You must create an algorithm using the **C1_MEMBGDRV** algorithm type and attach it to the **Bill Group Derivation** system event.

- Algorithm which should be triggered for calculating the premium for membership.

> **Note:** You must create an algorithm using the **C1_TIERPREM** algorithm type and attach it to the **Pricing Rule Premium Calculation** system event.

- Algorithm which should be triggered for creating the SQI based billable charges for each membership and price item combination.

> **Note:** You must create an algorithm using the **C1-FICRETBC** algorithm type and attach it to the **Pricing Rule Billable Charge Creation** system event.

- Algorithm which should be triggered for calculating the proration factor and amount for fully insured tier based pricing rule based on the policy plan configurations.

> **Note:** You must create an algorithm using the **C1-TIERPRFC** algorithm type and attach it to the **Pricing Rule Proration Amount Calculation** system event.

- Algorithm which should be triggered for distributing the total premium in the non-skip months of the coverage period.

> **Note:** You must create an algorithm using the **C1-SKPMNTHPC** algorithm type and attach it to the **Skip Month Premium Calculation (in case you want to use the 9/10 Billing feature)** system event.

- Price items for which you can define tier based pricing rules using the tier based pricing rule type.
- Rate options that you can use while defining the pricing for the respective price item.
- Type of account to which the respective price item should be billed based on the specified priority.
- Rule type which indicates the rules that should be executed to determine whether the price item is eligible for billing.
- Audit event types of the C1-Membership business object using which the audit event should be created whenever a membership is added, updated, or removed from the policy plan.
- Elements of the C1-Membership business object for which audit event should be created.

> **Note:** You must ensure that either the **Update All** option is selected or the elements listed in the tier based pricing rule type are already present in the respective audit event type. Otherwise, erroneous results might occur.

Once a tier based pricing rule type is defined, you can define tier based pricing rules using the tier based pricing rule type. Note that, at present, you can define tier based pricing rules only through a health care inbound message and not from the user interface. However, you can view the tier based pricing rules defined for a policy plan from the **Customer**

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360° Information screen. While creating a tier based pricing rule through a health care inbound message, you need to specify the following information:

- Entity type (i.e. Policy Plan) and entity ID (i.e. policy plan ID) for which you want to define the tier based pricing rule
- Start and end dates of the tier based pricing rule
- Tier based pricing rule type using which you want to create the tier based pricing rule
- Price Item for which you want to define tier based pricing
- Rate option using which the price assignment should be created for the tier based pricing rule

> **Note:** If the rate option is not given in the pricing rule data, by default, it is set to a value specified in the **Default Rate Option - Flat** option type of the **C1-ASOBLLNG** feature configuration when the modifier method is set to **FLAT** or **NULL**.

- Tier level and employee attributes for which the fee is applicable

> **Note:** The tier level and employee attributes can be defined as the parameters in the system. These parameters can then be used to define eligibility criteria in the tier based pricing. Here, you can use only those parameters where the parameter usage is set to **Pricing Eligibility**.

Once the tier based pricing rule is defined for a policy plan, the system creates a price item pricing and price list and then assigns the price item pricing to the price list.

Related Topics

For more information on...	See...
How to define a tier based pricing rule type	Defining a Tier Based Pricing Rule Type on page 3394
How to add the related pricing rule types in a tier based pricing rule type	Adding the Related Pricing Rule Types in a Tier Based Pricing Rule Type on page 3397
How to associating an algorithm with a tier based pricing rule type	Associating an Algorithm with a Tier Based Pricing Rule Type on page 3398
How to add a price item in a tier based pricing rule type	Adding a Price Item in a Tier Based Pricing Rule Type on page 3400
How to add a price item parameter in tier based pricing rule type	Adding a Price Item Parameter in a Tier Based Pricing Rule Type on page 3402
How to define the characteristics for a tier based pricing rule type	Defining a Characteristic for a Tier Based Pricing Rule Type on page 3403
How to add elements for an audit in a tier based pricing rule type	Adding Elements for Audit in a Tier Based Pricing Rule Type on page 3404
How to edit a tier based pricing rule type	Editing a Tier Based Pricing Rule Type on page 3405
How to delete a age based pricing rule type	Deleting a Tier Based Pricing Rule Type on page 3407
How to view the age based pricing rule type details	Viewing the Tier Based Pricing Rule Type Details on page 3408

Defining a Tier Based Pricing Rule Type

Prerequisites

To define a tier based pricing rule type, you should have:

- Tier based pricing rule type business object defined in the application.
- Tier based pricing rule business object defined in the application.

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- Pricing rule type category for the tier based defined in the application.

Procedure

To define a tier based pricing rule type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **P** and then click **Pricing Rule Type**.
   A sub-menu appears.
3. Click the **Add** option from the **Pricing Rule Type** sub-menu.

   The **Select Business Object** screen appears. It contains the following field:

Field Name	Field Description	Mandatory (Yes or No)
Pricing Rule Type Business Object	Used to indicate the business object using which you want to create a tier based pricing rule type. **Note:** You can create a tier based pricing rule type using the **Tier Based Pricing Rule Type (C1-PricingRuleTierBased)** business object.	Yes

Tip: Alternatively, you can access this screen by clicking the **Add** button in the **Page Title** area of the **Pricing Rule Type** screen.

4. Select the **Tier Based Pricing Rule Type** option from the **Pricing Rule Type Business Object** list.
5. Click **OK**.

   The **Tier Based Pricing Rule Type** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details about a tier based pricing rule type.
   - **Related Pricing Rule Type** - Used to define the pricing rule types which are related to the tier based pricing rule type.

     Note: The **Related Pricing Rule Type** section appears when the **Primary** check-box is selected.
   - **Algorithms** - Used to associate the algorithms with a tier based pricing rule type.
   - **Price Items** - Used to add the price items for which you can define the tier pricing rules using the tier based pricing rule type.
   - **Price Item Parameters** - Used to add the price item parameters based on which you want to define the price item pricing.
   - **Characteristics** - Used to define the characteristics for a tier based pricing rule type.
   - **Event Management** - Used to configure the audit in a tier based pricing rule type.

   The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Pricing Rule Type	Used to specify the tier based pricing rule type.	Yes
Description	Used to specify the description for the tier based pricing rule type.	Yes
Detailed Description	Used to specify additional information about the tier based pricing rule type.	No
Pricing Rule Business Object	Used to indicate the business object using which you want to create the tier based pricing rule type. The valid value is: • Tier Based Pricing Rule	Yes

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Field Name	Field Description	Mandatory (Yes or No)
Business Object	Indicates the business object using which you are defining the tier based pricing rule type.	Not applicable
Status	Used to indicate the status of a tier based pricing rule type. The valid values are: • Active • Inactive	Yes
Primary	Used to select the checkbox if the pricing rule type is primary.	No
Skip Non-Members	Used to select the checkbox when you want the system to only consider the eligible members and not non-members of the active employee coverage membership during tier based premium calculation.	No
Pricing Rule Type Category	Used to indicate the category to which the pricing rule type belongs. The valid value is: • Tier Based	Yes

6. Enter the required details in the **Main** section.
7. Add the related pricing rule types in the tier based pricing rule type, if required.

Note: The **Related Pricing Rule Type** section appears when the **Primary** check-box is selected.

8. Associate the required algorithms with the tier based pricing rule type:
9. Add the required price items in the tier based pricing rule type.
10. Add the price item parameters in the tier based pricing rule type, if required.
11. Define characteristics for the tier based pricing rule type, if required.
12. Configure the audit in the tier based pricing rule type.
13. Click **Save**.
    The tier based pricing rule type is defined.

Related Topics

For more information on...	See...
How to add the related pricing rule types in a tier based pricing rule type	Adding the Related Pricing Rule Types in a Tier Based Pricing Rule Type on page 3397
How to associate algorithms with the tier based pricing rule type	Associating an Algorithm with a Tier Based Pricing Rule Type on page 3398
How to add price items in the tier based pricing rule type	Adding a Price Item in a Tier Based Pricing Rule Type on page 3400
How to add price item parameters in the tier based pricing rule type	Adding a Price Item Parameter in a Tier Based Pricing Rule Type on page 3402
How to define a characteristic for the tier based pricing rule type	Defining a Characteristic for a Tier Based Pricing Rule Type on page 3403
How to add elements for audit in the tier based pricing rule type	Adding Elements for Audit in a Tier Based Pricing Rule Type on page 3404

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Adding the Related Pricing Rule Types in a Tier Based Pricing Rule Type

Prerequisites

To add related pricing rule types in a tier based pricing rule type, you should have:

- Additional fee pricing rule type defined in the application.
- Eligibility rule type defined in the application.

Procedure

To add related pricing rule types in a tier based pricing rule type:

1. Ensure that the **Related Pricing Rule Types** section is expanded when you are defining or editing a tier based pricing rule type.

   Note: This section appears when the **Primary** option is selected in the **Main** section.

   The **Related Pricing Rule Types** section contains the following columns in a grid:

Column Name	Column Description	Mandatory (Yes or No)
Sequence	Used to specify the order in which the related pricing rule type should be invoked.	Yes (Conditional) **Note:** This field is required when you are defining a pricing rule type for the related pricing rule type.
Pricing Rule Type	Used to specify the pricing rule type which should be executed to determine whether the related pricing rule type is eligible for deriving the transaction legs. **Note:** On clicking the **Search** (🔍) icon that appears corresponding to the **Pricing Rule Type** field, the **Pricing Rule Type Search** window appears. On specifying the related pricing rule type, the description of the pricing rule type appears corresponding to the **Pricing Rule Type** field.	Yes (Conditional) **Note:** This field is required when the corresponding **Sequence** and **Eligibility Rule Type** field is specified for the related pricing rule type.
Eligibility Rule Type	Used to indicate the rule type eligibility for the related pricing rule type. **Note:** The **Eligibility Rule Type** list includes only those rule-types where the rule type eligibility is **Related Pricing Rule Type Eligibility**.	No

2. Enter the required details in the **Related Pricing Rule Types** section.
3. If you want to define more than one related pricing rule type for the tier based pricing rule type, click the **Add** (+) icon and then repeat step 2.

   Note: However, if you want to remove a related pricing rule type from the tier based pricing rule type, click the **Delete** (🗑) icon corresponding to the related pricing rule type.

4. Click **Save**.

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The related pricing rule types are added for the tier based pricing rule type.

Related Topics

For more information on...	See...
How to define a age based pricing rule type	Defining an Age Based Pricing Rule Type on page 3376
How to define a tier based pricing rule type	Defining a Tier Based Pricing Rule Type on page 3394
How to edit a age based pricing rule type	Editing an Age Based Pricing Rule Type on page 3389
How to edit a tier based pricing rule type	Editing a Tier Based Pricing Rule Type on page 3405

Associating an Algorithm with a Tier Based Pricing Rule Type

Prerequisites

To associate an algorithm with a tier based pricing rule type, you should have:

- An algorithm defined using the **C1_ACCPRIMEM** algorithm type.
- An algorithm defined using the **C1-BILLPDRV** algorithm type.
- An algorithm defined using the **C1-BILLRPCR** algorithm type.
- An algorithm defined using the **C1-DERSUBTR** algorithm type.
- An algorithm defined using the **C1_MEMBGDRV** algorithm type.
- An algorithm defined using the **C1_TIERPREM** algorithm type.
- An algorithm defined using the **C1-FICRETBC** algorithm type.
- An algorithm defined using the **C1-TIERPRFC** algorithm type.
- An algorithm defined using the **C1-SKPMNTHPC** algorithm type.

Procedure

To associate an algorithm with a tier based pricing rule type:

1. Ensure that the **Algorithms** section is expanded when you are defining *or* editing the tier based pricing rule type.

   The **Algorithms** section contains the following columns in a grid:

Column Name	Column Description	Mandatory (Yes or No)
System Event	Used to indicate the system event when you want to invoke the algorithm. The valid values are: • **Account and Price Item Derivation** - Used to derive the account and price item for a membership. • **Account and Price Item Derivation Post-Processing** - Used to derive the bill period for the account. • **Account and Price Item Derivation Post-Processing** - Used to create the bill period timeline for the account. • **Account and Price Item Derivation Post-Processing** - Used to derive subscription tier for membership, based on the bill period configured on the account. • **Bill Group Derivation** - Used to derive the bill group, parent customer, and policy for a membership.	Yes **Note:** This field is required when you are associating an algorithm with the tier based pricing rule type.

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Column Name	Column Description	Mandatory (Yes or No)
	• **Premium Calculation** - Used to calculate the premium for each eligible member person. • **Billable Charge Creation Post Processing** - Used to create new billable charges for both pre-calculated and post-calculated charges. • **Pricing Rule Proration Amount Calculation** - Used to calculate proration factor and amount for tier based pricing rule based on the policy plan configurations. • **Skip Month Premium Calculation** - Used to distribute the total premium in the non-skip months of the coverage period.	
Sequence	Used to specify the order in which the algorithms for each system event must be executed.	Yes (Conditional) **Note:** This field is required when you are associating an algorithm with the tier based pricing rule type.
Algorithm	Used to specify the algorithm.	Yes (Conditional)
	Note: Once you select the system event, the **Search** (🔍) icon appears corresponding to the **Algorithm** field. On clicking the **Search** (🔍) icon, the **Algorithm Search** window appears. On specifying the algorithm, the description of the algorithm appears corresponding to the **Algorithm** field.	**Note:** This field is required when you are associating an algorithm with the tier based pricing rule type.

2. Enter the following details in the **Algorithms** section:

System Event	Algorithm	Algorithm Type	Description
Account and Price Item Derivation	C1_ACCPRIMEM	C1_ACCPRIMEM	Account and PriceItem Derivation for Membership
Account and Price Item Derivation Post-Processing	C1-BILLPDRV	C1-BILLPDRV	Bill Period Derivation
Account and Price Item Derivation Post-Processing	C1-BILLRPCR	C1-BILLRPCR	Bill Period Time Line Creation
Account and Price Item Derivation Post-Processing	C1-DERSUBTR	C1-DERSUBTR	Derive Subscription Tier for Membership
Bill Group Derivation	C1_MEMBGDRV	C1_MEMBGDRV	Bill Group Derivation for Membership
Premium Calculation	C1_TIERPREM	C1_TIERPREM	Tier Based Premium Calculation
Billable Charge Creation Post Processing	C1-FICRETBC	C1-FICRETBC	Fully Insured Charge Creation for Memberships
Pricing Rule Proration Amount Calculation	C1-TIERPRFC	C1-TIERPRFC	Calculate Proration Factor for Tier Based Pricing Rule

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System Event	Algorithm	Algorithm Type	Description
Skip Month Premium Calculation	C1-SKPMNTHPC	C1-SKPMNTHPC	Skip Month Premium Calculation

3. If you want to associate more than one algorithm with the tier based pricing rule type, click the **Add** (+) icon and then repeat step 2.

> **Note:** However, if you want to disassociate an algorithm from the tier based pricing rule type, click the **Delete** ( ) icon corresponding to the algorithm.

4. Click **Save**.
   The algorithms are associated with the tier based pricing rule type.

Related Topics

For more information on...	See...
How to define a tier based pricing rule type	Defining a Tier Based Pricing Rule Type on page 3394
How to edit a tier based pricing rule type	Editing a Tier Based Pricing Rule Type on page 3405

Adding a Price Item in a Tier Based Pricing Rule Type

Prerequisites

To add a price item in a tier based pricing rule type, you should have:

- Price item defined in the application
- Rate option defined in the **Rate Option (C1-ExtLookRetTypeRateOpt)** extendable lookup
- Values defined for the **Invoice Type (C1INVTYP)** characteristic type
- The **C1INVTYP** characteristic type set in the **Invoice Type Characteristic Type** option type of the **C1-ASOBLLNG** feature configuration
- Rule types defined in the application (where the rule type usage is set to **Price Item Eligibility**)

Procedure

To add a price item in a tier based pricing rule type:

1. Ensure that the **Price Items** section is expanded when you are defining or editing a tier based pricing rule type.

   The **Price Items** section contains the following fields in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Price Item	Used to indicate the price item that you want to include in a tier based pricing rule type. **Note:** The **Search** ( ) icon appears corresponding to the **Price Item** field. On clicking the **Search** icon, the **Price Item Search** window appears. On specifying the price item, the description of the price item appears corresponding to the **Price Item** field.	Yes (Conditional) **Note:** This field is required when you are adding a rate option and bill to account in a tier based pricing rule type.

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<table>
<tr><th>Field Name</th><th>Field Description</th><th>Mandatory (Yes or No)</th></tr>
<tr><td>Rate Option</td><td>Used to indicate one or more rate options which are valid for a price item.

On clicking the Add (+) icon, the following field appears in a grid:

<table>
<tr><th>Field Name</th><th>Field Description</th><th>Mandatory (Yes or No)</th></tr>
<tr><td>Rate Option</td><td>Used to indicate the rate option that you want to use while defining pricing for the price item.</td><td>Yes</td></tr>
</table>

Note:

If you want to define more than one rate option to the price item in a fully-insured tier based pricing rule type, click the Add (+) icon.

However, if you want to remove a price item from a fully-insured tier based pricing rule type, click the Delete (🗑) icon corresponding to the Rate Option field.</td><td>Not applicable</td></tr>
<tr><td>Bill To Account</td><td>Used to indicate a order in which the account should be considered while deriving a transaction leg.

On clicking the Add (+) icon, the following fields appear in a grid:

<table>
<tr><th>Field Name</th><th>Field Description</th><th>Mandatory (Yes or No)</th></tr>
<tr><td>Priority</td><td>Used to specify the order in which the invoice type is considered for a price item.</td><td>Yes</td></tr>
<tr><td>Invoice Type</td><td>Used to indicate the type which is considered for billing. For more information, refer to the Bill Group's Account on page 13 section.

Note: The Search (🔍) icon appears corresponding to the Invoice Type field. On clicking the Search icon, the Invoice Type Search window appears.</td><td>Yes</td></tr>
</table>

Note:

If you want to define more than one invoice type to the price item in a tier based pricing rule type, click the Add (+) icon.

However, if you want to remove a invoice type from the price item in a tier based pricing rule type, click the Delete (🗑) icon corresponding to the Priority field.</td><td>Not applicable</td></tr>
<tr><td>Eligibility Rule Type</td><td>Used to indicate the rule type (which indicates the rules) that should be executed to determine whether the price item is eligible for billing.</td><td>No</td></tr>
</table>

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2. Enter the required details in the **Price Items** section.
3. If you want to define more than one price item in a tier based pricing rule type, click the **Add** (+) icon and then repeat step 2.

> **Note:** However, if you want to remove a price item from a tier based pricing rule type, click the **Delete** (🗑) icon corresponding to the **Price Item** field.

4. Click **Save**.
   The price items are added for a tier based pricing rule type.

Related Topics

For more information on...	See...
How to define a tier based pricing rule type	Defining a Tier Based Pricing Rule Type on page 3394
How to edit a tier based pricing rule type	Editing a Tier Based Pricing Rule Type on page 3405

Adding a Price Item Parameter in a Tier Based Pricing Rule Type

Prerequisites

To add a price item parameter in a tier based pricing rule type, you should have:

- Parameter defined in the application where parameter usage is set to **Price Item**.
- Parameter associated with the price item.

Procedure

To add a price item parameter in a tier based pricing rule type:

1. Ensure that the **Price Item Parameters** section is expanded when you are defining *or* editing a tier based pricing rule type.

   The **Price Item Parameters** section contains the following fields in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Price Item Parameter	Used to specify the parameter which you can use while defining a tier based pricing for the price item. **Note:** The **Search** (🔍) icon appears corresponding to the **Price Item Parameter** field. On clicking the **Search** (🔍) icon corresponding to the **Price Item Parameter** field, the **Parameter Search** window appears. On specifying the parameter, the description of the price item parameter appears corresponding to the **Price Item Parameter** field.	Yes (Conditional) **Note:** This field is required when you are adding a price item parameter in a tier based pricing rule type.

2. Enter the required details in the **Price Item Parameters** section.
3. If you want to add more than one price item parameter in a tier based pricing rule type, click the **Add** (+) icon and then repeat step 2.

> **Note:** However, if you want to remove a price item parameter from a tier based pricing rule type, click the **Delete** (🗑) icon corresponding to the price item parameter.

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4. Click **Save**.
   The price item parameter is added for a tier based pricing rule type.

Related Topics

For more information on...	See...
How to define a tier based pricing rule type	Defining a Tier Based Pricing Rule Type on page 3394
How to edit a tier based pricing rule type	Editing a Tier Based Pricing Rule Type on page 3405

Defining a Characteristic for a Tier Based Pricing Rule Type

Prerequisites

To define a characteristic for a tier based pricing rule type, you should have:

- Characteristic types defined in the application (where the characteristic entity is set to **Pricing Rule Type**)

Procedure

To define a characteristic for a tier based pricing rule type:

1. Ensure that the **Characteristics** section is expanded when you are defining *or* editing a tier based pricing rule type.

   The **Characteristics** section contains the following columns in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Characteristic Type	Used to indicate the characteristic type.	Yes (Conditional)
	Note: The list includes only those characteristic types where the characteristic entity is set to **Pricing Rule Type**.	**Note:** This field is required when you are defining a characteristic for a tier based pricing rule type.
Characteristic Value	Used to specify the value for the characteristic type.	Yes (Conditional)
	Note: On specifying the value for a predefined characteristic type, the description of the characteristic value appears corresponding to the **Characteristic Value** field.	**Note:** This field is required when you are defining a characteristic for a tier based pricing rule type.

2. Enter the required details in the **Characteristics** section.

   Note: If you select a predefined characteristic type, the **Search** (🔍) icon appears corresponding to the **Characteristic Value** field. On clicking the **Search** icon, you can search for a predefined characteristic value.

3. If you want to define more than one characteristic for a tier based pricing rule type, click the **Add** (+) icon and then repeat step 2.

   Note: However, if you want to remove a characteristic from a tier based pricing rule type, click the **Delete** (🗑) icon corresponding to the characteristic.

4. Click **Save**.
   The characteristics are defined for a tier based pricing rule type.

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Related Topics

For more information on...	See...
How to define a tier based pricing rule type	Defining a Tier Based Pricing Rule Type on page 3394
How to edit a tier based pricing rule type	Editing a Tier Based Pricing Rule Type on page 3405

Adding Elements for Audit in a Tier Based Pricing Rule Type

Prerequisites

To add elements for audit in a tier based pricing rule type, you should have:

- Business Object **C1-AuditEventType** defined for the pricing rule type.
- Audit Event Type defined in the application.

Procedure

To add elements for audit in a tier based pricing rule type:

1. Ensure that the **Event Management** section is expanded when you are defining *o*r editing a tier based pricing rule type.

   The **Event Management** section contains the following fields in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Audit Event Type	Used to specify the audit event type which you can use while adding elements for audit in tier based pricing rule type. **Note:** The **Search** (🔍) icon appears corresponding to the **Audit Event Type** field. On clicking the **Search** (🔍) icon corresponding to the **Audit Event Type** field, the **Audit Event Type Search** window appears. On specifying the audit event type, the description of the audit event type appears corresponding to the **Audit Event Type** field.	Yes
Element Type	Used to indicate the type of audit element for a tier based pricing rule type. The valid values are: • Business Object Status • Characteristic • Field	Not applicable
Element Name	Used to specify the element name for a tier based pricing rule type. **Note:** The **Search** (🔍) icon appears corresponding to the **Element Name** field. On clicking the **Search** (🔍) icon corresponding to the **Element Name** field, the **Audit Event Type Element Name Search** window appears.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
Element Value	Used to specify the value for an element name.	Not applicable

2. Enter the required details in the **Price Item Parameters** section.
3. If you want to add more than one element for audit in a tier based pricing rule type, click the **Add** (+) icon and then repeat step 2.

> **Note:** However, if you want to remove an element for audit from a tier based pricing rule type, click the **Delete** ( ) icon corresponding to the price item parameter.

4. Click **Save**.
   The elements for audit are added for a tier based pricing rule type.

Related Topics

For more information on...	See...
How to define a tier based pricing rule type	Defining a Tier Based Pricing Rule Type on page 3394
How to edit a tier based pricing rule type	Editing a Tier Based Pricing Rule Type on page 3405

Editing a Tier Based Pricing Rule Type

Prerequisites

To edit a tier based pricing rule type, you should have:

- Tier Based pricing rule type business object defined in the application.
- Tier Based pricing rule business object defined in the application.

Procedure

To edit a tier based pricing rule type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **P** and then click **Pricing Rule Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Pricing Rule Type** sub-menu.
   The **Pricing Rule Type** screen appears.
4. In the **Pricing Rule Type List** zone, click the **Edit** ( ) icon in the **Edit** column corresponding *t*o the pricing rule type whose details you want to edit.

   The **Tier Based Pricing Rule Type** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details about a tier based pricing rule type.
   - **Related Pricing Rule Type** - Used to specify the pricing rule types which are related to the tier based pricing rule type.

     > **Note:** The **Related Pricing Rule Type** section appears when the **Primary** check-box is selected.

   - **Algorithms** - Used to associate the algorithms with a ier based pricing rule type.
   - **Price Items** - Used to add the price items for which you can define the tier based pricing rules using the tier based pricing rule type.
   - **Price Item Parameters** - Used to add the price item parameters based on which you want to define the price item pricing.

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- **Characteristics** - Used to define the characteristics for a tier based pricing rule type.
- **Event Management** - Used to configure the audit in a tier based pricing rule type.

The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Pricing Rule Type	Displays the tier based pricing rule type.	Not applicable
Description	Used to specify the description for a tier based pricing rule type.	Yes
Detailed Description	Used to specify additional information about a tier based pricing rule type.	No
Pricing Rule Business Object	Used to indicate the business object using which you want to create a tier based pricing rule type. The valid value is: • Tier Based Pricing Rule	Yes
Business Object	Indicates the business object using which you are defining a tier based pricing rule type.	Not applicable
Status	Used to indicate the status of a tier based pricing rule type. The valid values are: • Active • Inactive	Yes
Primary	Used to select the checkbox if the pricing rule type is primary. **Note:** The checkbox appears selected, if you have already selected the **Primary** option while defining a tier based pricing rule type.	No
Skip Non-Members	Used to select the checkbox when you want the system to only consider the eligible members and not non-members of the active employee coverage membership during tier based premium calculation. **Note:** The checkbox appears selected, if you have already selected the **Non-Covered Subscriber Eligible** option while defining a tier based pricing rule type.	No
Pricing Rule Type Category	Indicates the pricing rule type category for a tier based pricing rule type. The valid values is: • Tier Based	No

Tip: Alternatively, you can edit the details of a tier based pricing rule type by clicking the **Edit** button in the **Pricing Rule Type** zone.

5. Modify the details in the **Main** section.
6. Add, edit, or remove the related pricing rule types in the tier based pricing rule type, if required.

Note: The **Related Pricing Rule Type** section appears when the **Primary** check-box is selected.

7. Associate the required algorithms in a tier based pricing rule type.
8. Add, edit, or remove the required price items in a tier based pricing rule type.

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9. Add, edit, or remove the price item parameters in a tier based pricing rule type, if required.
10. Add, edit, or remove characteristics for a tier based pricing rule type, if required.
11. Add, edit, or remove the configuration details of the audit in a tier based pricing rule type.
12. Click **Save**.
    The changes made to the tier based pricing rule type are saved.

Related Topics

For more information on...	See...
How to add the related pricing rule types in a tier based pricing rule type	Adding the Related Pricing Rule Types in a Tier Based Pricing Rule Type on page 3397
How to associate algorithms with a tier based pricing rule type	Associating an Algorithm with a Tier Based Pricing Rule Type on page 3398
How to add price items in a tier based pricing rule type	Adding a Price Item in a Tier Based Pricing Rule Type on page 3400
How to add price item parameters in a tier based pricing rule type	Adding a Price Item Parameter in a Tier Based Pricing Rule Type on page 3402
How to define a characteristic for a tier based pricing rule type	Defining a Characteristic for a Tier Based Pricing Rule Type on page 3403
How to add elements for audit in a tier based pricing rule type	Adding Elements for Audit in a Tier Based Pricing Rule Type on page 3404

Deleting a Tier Based Pricing Rule Type

Procedure

To delete a tier based pricing rule type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **P** and then click **Pricing Rule Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Pricing Rule Type** sub-menu.
   The **Pricing Rule Type** screen appears.
4. In the **Pricing Rule Type List** zone, click the **Delete** (🗑) icon in the **Delete** column corresponding to the tier based pricing rule type that you want to delete.
   A message appears confirming whether you want to delete the tier based pricing rule type.

> **Note:** You can delete a tier based pricing rule type when it is not yet used in the system.

> **Tip:** Alternatively, you can delete a tier based pricing rule type by clicking the **Delete** button in the **Pricing Rule Type** zone.

5. Click **OK**.
   The tier based pricing rule type is deleted.

Related Topics

For more information on...	See...
Pricing Rule Type screen	Pricing Rule Type on page 2942

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For more information on...	See...
Pricing Rule Type List zone	Pricing Rule Type List on page 2943
Pricing Rule Type zone	Pricing Rule Type on page 2946

Viewing the Tier Based Pricing Rule Type Details

Procedure

To view the details of a tier based pricing rule type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **P** and then click **Pricing Rule Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Pricing Rule Type** sub-menu.
   The **Pricing Rule Type** screen appears.
4. In the **Pricing Rule Type List** zone, click the **Broadcast** (ᯤ) icon corresponding to the tier based pricing rule type whose details you want to view.
   The **Pricing Rule Type** zone appears.
5. View the details of the tier based pricing rule type in the **Pricing Rule Type** zone.

Related Topics

For more information on...	See...
Pricing Rule Type screen	Pricing Rule Type on page 2942
Pricing Rule Type List zone	Pricing Rule Type List on page 2943
Pricing Rule Type zone	Pricing Rule Type on page 2946

Pass-Through Billable Charge

At times, the system might receive pre-calculated premium for the membership through a health care inbound message. If the price item, account identifier type, and account identifier are given in the billable charge information of a health care inbound message, the system directly creates an SQI based billable charge when you process the health care inbound message. The pre-calculated premium amount is stored as a pass through line in the SQI based billable charge. But, if only the price item is given in the billable charge information, the system checks whether the price item is included in any pricing rule type where the pricing rule type category is set to **Pass-Through Billable Charge**. If so, the system checks whether the pass-through billable charge pricing rule type is associated with the policy plan to which the membership belongs (for which the billable charge information is received). It is the pass-through billable charge pricing rule type which helps the system to determine:

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

  Note: You must create an algorithm using the **C1_MEMBGDRV** algorithm type and attach it to the **Bill Group Derivation** system event.
- Algorithm which should be triggered for deriving the account and price item for a membership.

  Note: You must create an algorithm using the **C1_ACCPRIMEM** algorithm type and attach it to the **Account and Price Item Derivation** system event.
- Algorithm which should be triggered for deriving the bill period for the account.

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> **Note:**
>
> You must create an algorithm using the **C1-FIBCBP** algorithm type and attach it to the **Pricing Rule BC Creation Pre Processing** system event.
>
> If the bill period or frequency is given in the billable charge information of the health care inbound message, the system does not derive the bill period for the account.

- Algorithm which should be triggered for creating the SQI based billable charges for each membership and price item combination.

> **Note:** You must create an algorithm using the **C1-FICRETBC** algorithm type and attach it to the **Pricing Rule Billable Charge Creation** system event.

- Price items for which you can create the SQI based billable charges using the pass-through billable charge pricing rule type.

> **Note:** You can add multiple price items in a pass-through billable charge pricing rule type. But, you cannot add the same price item in multiple pass-through billable charge pricing rule types.

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

Related Topics

For more information on...	See...
How to define a pass-through billable charge pricing rule type	Defining a Pass-Through Billable Charge Pricing Rule Type on page 3409
How to associating an algorithm with a pass-through billable charge pricing rule type	Associating an Algorithm with a Pass-Through Billable Charge Pricing Rule Type on page 3411
How to add a price item in a pass-through billable charge pricing rule type	Adding a Price Item in a Pass-Through Billable Charge Pricing Rule Type on page 3413
How to add a price item parameter in pass-through billable charge pricing rule type	Adding a Price Item Parameter in a Pass-Through Billable Charge Pricing Rule Type on page 3415
How to define the characteristics for a pass-through billable charge pricing rule type	Defining a Characteristic for a Pass-Through Billable Charge Pricing Rule Type on page 3416
How to edit a pass-through billable charge pricing rule type	Editing a Pass-Through Billable Charge Pricing Rule Type on page 3417
How to delete a pass-through billable charge pricing rule type	Deleting a Pass-Through Billable Charge Pricing Rule Type on page 3419
How to view the pass-through billable charge pricing rule type details	Viewing the Pass-Through Billable Charge Pricing Rule Type Details on page 3419

Defining a Pass-Through Billable Charge Pricing Rule Type

Prerequisites

To define a pass-through billable charge pricing rule type, you should have:

- Pass-through billable charge pricing rule type business object defined in the application.
- Pass-through billable charge pricing rule business object defined in the application.

Procedure

To define a pass-through billable charge pricing rule type:

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1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **P** and then click **Pricing Rule Type**.
   A sub-menu appears.
3. Click the **Add** option from the **Pricing Rule Type** sub-menu.

   The **Select Business Object** screen appears. It contains the following field:

Field Name	Field Description	Mandatory (Yes or No)
Pricing Rule Type Business Object	Used to indicate the business object using which you want to create a pass-through billable charge pricing rule type. **Note:** You can create a pass-through billable charge pricing rule type using the **Pass-Through Billable Charge Pricing Rule Type (C1-FIPassthroughBcRuleType)** business object.	Yes

Tip: Alternatively, you can access this screen by clicking the **Add** button in the **Page Title** area of the **Pricing Rule Type** screen.

4. Select the **Pass-Through Billable Charge Pricing Rule Type** option from the **Pricing Rule Type Business Object** list.
5. Click **OK**.

   The **Pass-Through Billable Charge Pricing Rule Type** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details about the pass-through billable charge pricing rule type.
   - **Algorithms** - Used to associate the algorithms with the pass-through billable charge pricing rule type.
   - **Price Items** - Used to add the price items for which you can define the pass-through billable charge pricing rules using the age based pricing rule type.
   - **Price Item Parameters** - Used to add the price item parameters based on which you want to define the price item pricing.
   - **Characteristics** - Used to define the characteristics for the pass-through billable charge pricing rule type.

   The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Pricing Rule Type	Used to specify the pass-through billable charge pricing rule type.	Yes
Description	Used to specify the description for the pass-through billable charge pricing rule type.	Yes
Detailed Description	Used to specify additional information about the pass-through billable charge pricing rule type.	No
Pricing Rule Business Object	Used to indicate the business object using which you want to create the pass-through billable charge pricing rule type. The valid value is: • Pass-Through Billable Charge Pricing Rule	Yes
Business Object	Indicates the business object using which you are defining the pass-through billable charge pricing rule type.	Not applicable
Status	Used to indicate the status of the pass-through billable charge pricing rule type. The valid values are: • Active	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	• Inactive	
Pricing Rule Type Category	Used to indicate the category to which the pricing rule type belongs. The valid value is: • Pass-Through Billable Charge	Yes

6. Enter the required details in the **Main** section.
7. Associate the required algorithms with the pass-through billable charge pricing rule type.
8. Add the required price items in the pass-through billable charge pricing rule type.
9. Add the price item parameters in the pass-through billable charge pricing rule type, if required.
10. Define characteristics for the pass-through billable charge pricing rule type, if required.
11. Click **Save**.
    The pass-through billable charge pricing rule type is defined.

Related Topics

For more information on...	See...
How to associate algorithms with the pass-through billable charge pricing rule type	Associating an Algorithm with a Pass-Through Billable Charge Pricing Rule Type on page 3411
How to add price items in the pass-through billable charge pricing rule type	Adding a Price Item in a Pass-Through Billable Charge Pricing Rule Type on page 3413
How to add price item parameters in the pass-through billable charge pricing rule type	Adding a Price Item Parameter in a Pass-Through Billable Charge Pricing Rule Type on page 3415
How to define a characteristic for the pass-through billable charge pricing rule type	Defining a Pass-Through Billable Charge Pricing Rule Type on page 3409

Associating an Algorithm with a Pass-Through Billable Charge Pricing Rule Type

Prerequisites

To associate an algorithm with a pass-through billable charge pricing rule type, you should have:

- An algorithm defined using the **C1_MEMBGDRV** algorithm type.
- An algorithm defined using the **C1_ACCPRIMEM** algorithm type.
- An algorithm defined using the **C1-FIBCBP** algorithm type.
- An algorithm defined using the **C1-FICRETBC** algorithm type.

Procedure

To associate an algorithm with a pass-through billable charge pricing rule type:

1. Ensure that the **Algorithms** section is expanded when you are defining or editing the *p*ass-through billable charge pricing rule type.

   The **Algorithms** section contains the following columns in a grid:

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Column Name	Column Description	Mandatory (Yes or No)
System Event	Used to indicate the system event when you want to invoke the algorithm. The valid values are: • **Bill Group Derivation** - Used to derive the bill group, parent customer, and policy for a membership. • **Account and Price Item Derivation** - Used to derive the account and price item for a membership. • **Pricing Rule BC Creation Pre Processing** - Used to derive the bill period for the account. • **Pricing Rule Billable Charge Creation** - Used to derive the price items for which you can create the SQI based billable charges using the pass-through billable charge pricing rule type.	Yes **Note:** This field is required when you are associating an algorithm with a pass-through billable charge pricing rule type.
Sequence	Used to specify the order in which the algorithms for each system event must be executed.	Yes (Conditional) **Note:** This field is required when you are associating an algorithm with a pass-through billable charge pricing rule type.
Algorithm	Used to specify the algorithm. **Note:** Once you select the system event, the **Search** (🔍) icon appears corresponding to the **Algorithm** field. On clicking the **Search** (🔍) icon, the **Algorithm Search** window appears. On specifying the algorithm, the description of the algorithm appears corresponding to the **Algorithm** field.	Yes (Conditional) **Note:** This field is required when you are associating an algorithm with a pass-through billable charge pricing rule type.

2. Enter the following details in the **Algorithms** section:

System Event	Algorithm	Algorithm Type	Description
Bill Group Derivation	C1_MEMBGDRV	C1_MEMBGDRV	Bill Group Derivation for Membership
Account and Price Item Derivation	C1_ACCPRIMEM	C1_ACCPRIMEM	Account and PriceItem Derivation for Membership
Pricing Rule BC Creation Pre Processing	C1-FIBCBP	C1-FIBCBP	Fetch Bill Period of Billable Charge of Membership
Pricing Rule Billable Charge Creation	C1-FICRETBC	C1-FICRETBC	Fully-Insured Charge creation for Memberships

3. If you want to associate more than one algorithm with a pass-through billable charge pricing rule type, click the **Add** (+) icon and then repeat step 2.

Note: However, if you want to disassociate an algorithm from a pass-through billable charge pricing rule type, click the **Delete** (🗑) icon corresponding to the algorithm.

4. Click **Save**.
The algorithms are associated with a pass-through billable charge pricing rule type.

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Related Topics

For more information on...	See...
How to define pass-through billable charge pricing rule type	Defining a Pass-Through Billable Charge Pricing Rule Type on page 3409
How to edit pass-through billable charge pricing rule type	Editing a Pass-Through Billable Charge Pricing Rule Type on page 3417

Adding a Price Item in a Pass-Through Billable Charge Pricing Rule Type

Prerequisites

To add a price item in a pass-through billable charge pricing rule type, you should have:

- Price item defined in the application
- Rate option defined in the **Rate Option (C1-ExtLookRetTypeRateOpt)** extendable lookup
- Values defined for the **Invoice Type (C1INVTYP)** characteristic type
- The **C1INVTYP** characteristic type set in the **Invoice Type Characteristic Type** option type of the **C1-ASOBLLNG** feature configuration
- Rule types defined in the application (where the rule type usage is set to **Price Item Eligibility**)

Procedure

To add a price item in a pass-through billable charge pricing rule type:

1. Ensure that the **Price Items** section is expanded when you are defining or editing a *p*ass-through billable charge pricing rule type.

   The **Price Items** section contains the following fields in a grid:

<table>
<tr><th>Field Name</th><th>Field Description</th><th>Mandatory (Yes or No)</th></tr>
<tr><td rowspan="3">Price Item</td><td>Used to indicate the price item that you want to include in a pass-through billable charge pricing rule type.</td><td>Yes (Conditional)</td></tr>
<tr><td>Note:
The Search (🔍) icon appears corresponding to the Price Item field. On clicking the Search icon, the Price Item Search window appears.
On specifying the price item, the description of the price item appears corresponding to the Price Item field.</td><td rowspan="2">Note: This field is required when you are adding a rate option and bill to account in a pass-through billable charge pricing rule type.</td></tr>
<tr><td></td></tr>
<tr><td>Rate Option</td><td>Used to indicate one or more rate options which are valid for a price item.
On clicking the Add (➕) icon, the following field appears in a grid:
<table>
<tr><th>Field Name</th><th>Field Description</th><th>Mandatory (Yes or No)</th></tr>
<tr><td>Rate Option</td><td>Used to indicate the rate option that you want to use while defining pricing for the price item.</td><td>Yes</td></tr>
</table></td><td>Not applicable</td></tr>
</table>

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<table>
<tr><th>Field Name</th><th>Field Description</th><th>Mandatory (Yes or No)</th></tr>
<tr><td></td><td>Note:
If you want to define more than one rate option to the price item in a pass-through billable charge pricing rule type, click the Add (+) icon.
However, if you want to remove a price item from a pass-through billable charge pricing rule type, click the Delete (🗑) icon corresponding to the Rate Option field.</td><td></td></tr>
<tr><td>Bill To Account</td><td>Used to indicate a order in which the account should be considered while deriving a transaction leg.
On clicking the Add (📄) icon, the following fields appear in a grid:
<table>
<tr><th>Field Name</th><th>Field Description</th><th>Mandatory (Yes or No)</th></tr>
<tr><td>Priority</td><td>Used to specify the order in which the invoice type is considered for a price item.</td><td>Yes</td></tr>
<tr><td>Invoice Type</td><td>Used to indicate the type which is considered for billing. For more information, refer to the Bill Group's Account on page 13 section.
Note: The Search (🔍) icon appears corresponding to the Invoice Type field. On clicking the Search icon, the Invoice Type Search window appears.</td><td>Yes</td></tr>
</table>
Note:
If you want to define more than one invoice type to the price item in a pass-through billable charge pricing rule type, click the Add (+) icon.
However, if you want to remove a invoice type from the price item in a pass-through billable charge pricing rule type, click the Delete (🗑) icon corresponding to the Priority field.</td><td>Not applicable</td></tr>
<tr><td>Eligibility Rule Type</td><td>Used to indicate the rule type (which indicates the rules) that should be executed to determine whether the price item is eligible for billing.</td><td>No</td></tr>
</table>

2. Enter the required details in the **Price Items** section.
3. If you want to define more than one price item in a pass-through billable charge pricing rule type, click the **Add** (+) icon and then repeat step 2.

Note: However, if you want to remove a price item from a pass-through billable charge pricing rule type, click the **Delete** (🗑) icon corresponding to the **Price Item** field.

4. Click **Save**.
   The price items are added for a pass-through billable charge pricing rule type.

Related Topics

For more information on...	See...
How to define a pass-through billable charge pricing rule type	Defining a Pass-Through Billable Charge Pricing Rule Type on page 3409

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For more information on...	See...
How to edit a pass-through billable charge pricing rule type	Editing a Pass-Through Billable Charge Pricing Rule Type on page 3417

Adding a Price Item Parameter in a Pass-Through Billable Charge Pricing Rule Type

Prerequisites

To add a price item parameter in a pass-through billable charge pricing rule type, you should have:

- Parameter defined in the application where parameter usage is set to **Price Item**.
- Parameter associated with the price item.

Procedure

To add a price item parameter in a pass-through billable charge pricing rule type:

1. Ensure that the **Price Item Parameters** section is expanded when you are defining or editing a pass-through billable charge pricing rule type.

   The **Price Item Parameters** section contains the following fields in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Price Item Parameter	Used to specify the parameter which you can use while defining a pass-through billable charge pricing for the price item.	Yes (Conditional) **Note:** This field is required when you are adding a price item parameter in a pass-through billable charge pricing rule type.
	Note: The **Search** (🔍) icon appears corresponding to the **Price Item Parameter** field. On clicking the **Search** (🔍) icon corresponding to the **Price Item Parameter** field, the **Parameter Search** window appears. On specifying the parameter, the description of the price item parameter appears corresponding to the **Price Item Parameter** field.	

2. Enter the required details in the **Price Item Parameters** section.
3. If you want to add more than one price item parameter in a pass-through billable charge pricing rule type, click the **Add** (+) icon and then repeat step 2.

   Note: However, if you want to remove a price item parameter from a pass-through billable charge pricing rule type, click the **Delete** (🗑) icon corresponding to the price item parameter.

4. Click **Save**.
   The price item parameter is added for a pass-through billable charge pricing rule type.

Related Topics

For more information on...	See...
How to define a pass-through billable charge pricing rule type	Defining a Pass-Through Billable Charge Pricing Rule Type on page 3409
How to edit a pass-through billable charge pricing rule type	Editing a Pass-Through Billable Charge Pricing Rule Type on page 3417

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Defining a Characteristic for a Pass-Through Billable Charge Pricing Rule Type

Prerequisites

To define a characteristic for a pass-through billable charge pricing rule type, you should have:

- Characteristic types defined in the application (where the characteristic entity is set to **Pricing Rule Type**)

Procedure

To define a characteristic for a pass-through billable charge pricing rule type:

1. Ensure that the **Characteristics** section is expanded when you are defining or editing a pass-through billable charge pricing rule type.

   The **Characteristics** section contains the following columns in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Characteristic Type	Used to indicate the characteristic type.	Yes (Conditional)
	Note: The list includes only those characteristic types where the characteristic entity is set to **Pricing Rule Type**.	**Note:** This field is required when you are defining a characteristic for a pass-through billable charge pricing rule type.
Characteristic Value	Used to specify the value for the characteristic type.	Yes (Conditional)
	Note: If you select a predefined characteristic type, the **Search** (🔍) icon appears corresponding to the **Characteristic Value** field. On clicking the **Search** icon, the **Predefined Characteristic Search** window appears. On specifying the value for a predefined characteristic type, the description of the characteristic value appears corresponding to the **Characteristic Value** field.	**Note:** This field is required when you are defining a characteristic for a pass-through billable charge pricing rule type.

2. Enter the required details in the **Characteristics** section.
3. If you want to define more than one characteristic for a pass-through billable charge pricing rule type, click the **Add** (+) icon and then repeat step 2.

   Note: However, if you want to remove a characteristic from a pass-through billable charge pricing rule type, click the **Delete** (🗑) icon corresponding to the characteristic.

4. Click **Save**.
   The characteristics are defined for a pass-through billable charge pricing rule type.

Related Topics

For more information on...	See...
How to define a pass-through billable charge pricing rule type	Defining a Pass-Through Billable Charge Pricing Rule Type on page 3409
How to edit a pass-through billable charge pricing rule type	Editing a Pass-Through Billable Charge Pricing Rule Type on page 3417

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Editing a Pass-Through Billable Charge Pricing Rule Type

Prerequisites

To edit a pass-through billable charge pricing rule type, you should have:

- Pass-Through Billable Charge pricing rule type business object defined in the application.
- Pass-Through Billable Charge pricing rule business object defined in the application.

Procedure

To edit a pass-through Billable Charge pricing rule type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **P** and then click **Pricing Rule Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Pricing Rule Type** sub-menu.
   The **Pricing Rule Type** screen appears.
4. In the **Pricing Rule Type List** zone, click the **Edit** (✎) icon in the **Edit** column corresponding *t*o the pricing rule type whose details you want to edit.

   The **Pass-Through Billable Charge Age Based Pricing Rule Type** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details about a pass-through billable charge pricing rule type.
   - **Algorithms** - Used to associate the algorithms with a pass-through billable charge pricing rule type.
   - **Price Items** - Used to add the price items for which you can define the pass-through billable charge pricing rules using the pass-through billable charge pricing rule type.
   - **Price Item Parameters** - Used to add the price item parameters based on which you want to define the price item pricing.
   - **Characteristics** - Used to define the characteristics for a pass-through billable charge pricing rule type.

   The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Pricing Rule Type	Displays the pass-through billable charge pricing rule type.	Not applicable
Description	Used to specify the description for a pass-through billable charge pricing rule type.	Yes
Detailed Description	Used to specify additional information about a pass-through billable charge pricing rule type.	No
Pricing Rule Business Object	Used to indicate the business object using which you want to create a pass-through billable charge pricing rule type. The valid value is: • Pass-Through Billable Charge	Yes
Business Object	Indicates the business object using which you are defining a pass-through billable charge pricing rule type.	Not applicable
Status	Used to indicate the status of a pass-through billable charge pricing rule type. The valid values are: • Active • Inactive	Yes

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Field Name	Field Description	Mandatory (Yes or No)
Pricing Rule Type Category	Indicates the pricing rule type category for a pass-through billable charge pricing rule type. The valid value is: • Pass-Through Billable Charge **Note:** It is a read-only field, and cannot be edited.	No

Tip: Alternatively, you can edit the details of a pass-through billable charge pricing rule type by clicking the **Edit** button in the **Pricing Rule Type** zone.

5. Modify the details in the **Main** section.
6. Associate the following algorithms with the pass-through billable charge pricing rule type:

System Event	Algorithm	Algorithm Type	Description
Bill Group Derivation	C1_MEMBGDRV	C1_MEMBGDRV	Bill Group Derivation for Membership
Account and Price Item Derivation	C1_ACCPRIMEM	C1_ACCPRIMEM	Account and PriceItem Derivation for Membership
Pricing Rule BC Creation Pre Processing	C1-FIBCBP	C1-FIBCBP	Fetch Bill Period of Billable Charge of Membership
Pricing Rule Billable Charge Creation	C1-FICRETBC	C1-FICRETBC	Fully-Insured Charge creation for Memberships

7. Add, edit, or remove the required price items in a pass-through billable charge pricing rule type.
8. Add, edit, or remove the price item parameters in a pass-through billable charge pricing rule type, if required.
9. Add, edit, or remove characteristics for a pass-through billable charge pricing rule type, if required.
10. Click **Save**.
    The changes made to the a pass-through billable charge pricing rule type are saved.

Related Topics

For more information on...	See...
How to associate algorithms with a pass-through billable charge pricing rule type	Associating an Algorithm with a Pass-Through Billable Charge Pricing Rule Type on page 3411
How to add price items in a pass-through billable charge pricing rule type	Adding a Price Item in a Pass-Through Billable Charge Pricing Rule Type on page 3413
How to add price item parameters in a pass-through billable charge pricing rule type	Adding a Price Item Parameter in a Pass-Through Billable Charge Pricing Rule Type on page 3415
How to define a characteristic for a pass-through billable charge pricing rule type	Defining a Characteristic for a Pass-Through Billable Charge Pricing Rule Type on page 3416

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Deleting a Pass-Through Billable Charge Pricing Rule Type

Procedure

To delete a pass-through billable charge pricing rule type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **P** and then click **Pricing Rule Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Pricing Rule Type** sub-menu.
   The **Pricing Rule Type** screen appears.
4. In the **Pricing Rule Type List** zone, click the **Delete** ( ) icon in the **Delete** column corresponding *t*o the pass-through billable charge pricing rule type that you want to delete.
   A message appears confirming whether you want to delete the pass-through billable charge pricing rule type.

   Note: You can delete a pass-through billable charge pricing rule type when it is not yet used in the system.

   Tip: Alternatively, you can delete a pass-through billable charge pricing rule type by clicking the **Delete** button in the **Pricing Rule Type** zone.
5. Click **OK**.
   The pass-through billable charge pricing rule type is deleted.

Related Topics

For more information on...	See...
Pricing Rule Type screen	Pricing Rule Type on page 2942
Pricing Rule Type List zone	Pricing Rule Type List on page 2943
Pricing Rule Type zone	Pricing Rule Type on page 2946

Viewing the Pass-Through Billable Charge Pricing Rule Type Details

Procedure

To view the details of a pass-through billable charge pricing rule type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **P** and then click **Pricing Rule Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Pricing Rule Type** sub-menu.
   The **Pricing Rule Type** screen appears.
4. In the **Pricing Rule Type List** zone, click the **Broadcast** ( ) icon corresponding to the pass-through *b*illable charge pricing rule type whose details you want to view.
   The **Pricing Rule Type** zone appears.
5. View the details of the pass-through billable charge pricing rule type in the **Pricing Rule Type** zone.

Related Topics

For more information on...	See...
Pricing Rule Type screen	Pricing Rule Type on page 2942

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For more information on...	See...
Pricing Rule Type List zone	Pricing Rule Type List on page 2943
Pricing Rule Type zone	Pricing Rule Type on page 2946

Additional Fee Pricing for COBRA Membership

In the Fully-Insured Pricing, the base premium for COBRA memberships is calculated either using the **Age Based Pricing Rule Type** or **Tier Based Pricing Rule Type**. In addition to the premium, COBRA membership is also charged with additional fee which can be either defined as flat charges or premium percentage. You can configure the COBRA additional fee by creating an additional fee pricing rule using an additional fee pricing rule type. You must include an additional fee pricing rule type as a related pricing rule type (in the age based or tier based pricing rule type) of the premium pricing rule type defined for the plan with a conditional rule that additional charges are only applicable for those memberships where the membership type is defined as COBRA.

The COBRA additional fee rates are generally not customer specific but remain common across different states or regions. The system provides you with an ability to define the additional fees at a higher level and if required override them at a lower level. You can define the COBRA additional fee at plan, policy, parent customer, and state level. The system checks whether the COBRA additional fee pricing rule definition is defined at the policy plan level. If an effective dated pricing rule does not exist at the policy plan level, the system further checks the additional fee pricing rule definition at policy, parent customer, and state level.

Group health insurance plans, such as High deductible Health Plans, have the Health Savings Account (HSA) linked to it. Every HSA is charged a flat administrative fee per coverage per month. The system enables you to create a flat charge per subscriber per month to facilitate this business requirement using an additional fee pricing rule.

You can define an additional fee pricing rule using an additional fee pricing rule type. It is the additional fee pricing rule type which helps the system to determine:

- **C1-PrcRuleTypeCapitationFee** Business object using which the additional charges pricing rule should be created in the system.
- Algorithm which should be triggered for deriving the bill group, parent customer, and policy for a membership.
- Algorithm which should be triggered for deriving the account and price item for a membership.
- Algorithm which should be triggered for calculating the COBRA additional fees for each eligible member person.
- Algorithm which should be triggered for creating the SQI based billable charges for each membership and price item combination.
- Algorithm which should be triggered for prorating the calculated COBRA additional fees as per the proration factor.
- Algorithm which should be triggered for creating the SQI based billable charges for each membership and price item combination.
- Price items for which you can define pricing rules for COBRA additional fee using the additional charges pricing rule type.
- Rate options that you can use while defining the pricing for the respective price item.
- Type of account to which the respective price item should be billed based on the specified priority.
- Rule type which indicates the rules that should be executed to determine whether the price item is eligible for billing.
- Audit event types of the **C1-Membership** and **C1-PERSON** business objects using which the audit event should be created whenever a membership or member person is added, updated, or removed from the policy plan.
- Elements of the **C1-Membership** and **C1-PERSON** business objects for which audit event should be created.

  Note: You must ensure that either the **Update All** option is selected or the elements listed in the age based pricing rule type are already present in the respective audit event type. Otherwise, erroneous results might occur.
- Members, such as main subscriber, spouse, or children in a membership which are eligible for premium calculation. The system will only consider the member with the specified relationship type during premium calculation.

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Once an additional fee pricing rule type is defined, you can then define the additional fee pricing rule using the additional fee pricing rule type.

Note: At present, you can define the additional fee pricing rule type only through the healthcare inbound message and not from the user interface. However, you can view the additional fee pricing rule defined for a policy plan or policy, parent customer or state from the **Customer 360° Information** screen.

The system enables you to create:

- A primary flat charge pricing rule type
- A related pricing rule type which depends on the premium amount for calculation of an additional charge

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

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

While creating COBRA Admin Fees Pricing rule through a healthcare inbound message, you need to specify the following information:

- Entity type and Entity ID (i.e. Policy Plan and Policy Plan ID, or Policy and Policy ID, or Parent Customer and Parent Customer ID, or State and State Level) for which you want to define the COBRA additional fee pricing rule.
- Pricing Type - Flat or Percentage
- Start and end dates of the COBRA additional fee pricing rule.
- Additional fee pricing rule type using which you want to create the age based pricing rule
- Price Item for which you want to define the COBRA additional fee pricing rule.
- Rate option using which the price assignment should be created for the COBRA additional fees.

Note: In case you want flat based COBRA additional fees, use the **HC_FRTSC** rate schedule. In case of percentage based pricing, use the **HC_CAPRS** rate schedule.

Defining an Additional Fee Pricing Rule Type

Prerequisites

To define an additional fee pricing rule type, you should have:

- Additional fee pricing rule type business object defined in the application.

Procedure

To define an additional fee pricing rule type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **P** and then click **Pricing Rule Type**.
   A sub-menu appears.

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3. Click the **Add** option from the **Pricing Rule Type** sub-menu.

   The **Select Business Object** screen appears. It contains the following field:

Field Name	Field Description	Mandatory (Yes or No)
Pricing Rule Type Business Object	Used to indicate the business object using which you want to create the additional fee pricing rule type. **Note:** You can create an additional fee pricing rule type using the **Additional Charge Pricing Rule Type (C1-PrcRuleTypeCapitationFee)** business object.	Yes

Tip: Alternatively, you can access this screen by clicking the **Add** button in the **Page Title** area of the **Pricing Rule Type** screen.

4. Select the **Additional Fee Pricing Rule Type** business object.
5. Click **OK**.

   The **Additional Fee Pricing Rule Type** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details about the additional fee pricing rule type.
   - **Algorithms** - Used to associate the algorithms with the additional fee pricing rule type.
   - **Price Items** - Used to add the price items for which you can define the pricing rules using the additional fee pricing rule type.
   - **Price Item Parameters** - Used to add the price item parameters based on which you want to define the price item pricing.
   - **Characteristics** - Used to define the characteristics for an additional fee pricing rule type.
   - **Event Management** - Used to define the audit event type details for an additional fee pricing rule type.

   The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Pricing Rule Type	Used to specify the additional fee pricing rule type.	Yes
Description	Used to specify the description for the additional fee pricing rule type.	Yes
Detailed Description	Used to specify the additional information about the additional fee pricing rule type.	No
Pricing Rule Business Object	Used to indicate the business object using which you want to create the additional fee pricing rule type. The valid value is: • Additional Fee Pricing Rule	Yes
Business Object	Indicates the business object using which you are defining the additional fee pricing rule type.	Not applicable
Status	Used to indicate the status of the additional fee pricing rule type. The valid values are: • Active • Inactive	Yes
Primary	Used to indicate whether the pricing rule type is a primary pricing rule type.	Not applicable

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Field Name	Field Description	Mandatory (Yes or No)
	Note: You must not select the **Primary** option while defining the additional fee pricing rule type.	
Skip Non-Members	Used to indicate whether the non-member membership persons should be used for the age based calculations. **Note:** This field is not applicable for additional fee pricing rule type.	Not applicable
Pricing Rule Type Category	Used to indicate the category to which the additional fee pricing rule type belongs. The valid value is: • Additional Fee	Yes
Pricing Rule Type Sub Category	Used to indicate the pricing rule type sub category for the additional fee pricing rule type. The valid value are: • Per Member • Per Subscriber **Note:** You must select the **Per Subscriber** option while defining the additional fee pricing rule type.	Not applicable

6. Enter the required details in the **Main** section.
7. Associate the required algorithms with the additional fee pricing rule type:
8. Add the required price items for the additional fee pricing rule type.
9. Add price item parameters for the additional fee pricing rule type, if required.
10. Define characteristics for the additional fee pricing rule type, if required.
11. Configure the audit in the additional fee pricing rule type.
12. Click **Save**.
    The additional fee pricing rule type is defined.

Related Topics

For more information on...	See...
Pricing Rule Type screen	Pricing Rule Type on page 2942
How to associate algorithms with an additional fee pricing rule type	Associating an Algorithm with an Additional Fee Pricing Rule Type on page 3424
How to add price items in the additional fee pricing rule type	Adding a Price Item in an Additional Fee Pricing Rule Type on page 3426
How to add price item parameters in the additional fee pricing rule type	Adding a Price Item Parameter in an Additional Fee Pricing Rule Type on page 3428
How to define a characteristic for an additional fee pricing rule type	Defining a Characteristic for an Additional Fee Pricing Rule Type on page 3429
How to define event management for the additional fee pricing rule type	Adding Elements for Audit in an Additional Fee Pricing Rule Type on page 3430

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Associating an Algorithm with an Additional Fee Pricing Rule Type

Prerequisites

To associate an algorithm with an additional fee pricing rule type, you should have:

- An algorithm defined using the **C1_ACCPRIMEM** algorithm type.
- An algorithm defined using the **C1_MEMBGDRV** algorithm type.
- An algorithm defined using the **C1-DERSUBTR** algorithm type.
- An algorithm defined using the **C1_TIERPREM** algorithm type.
- An algorithm defined using the **C1-FIBCBP** algorithm type.
- An algorithm defined using the **C1-BILLRPCR** algorithm type.
- An algorithm defined using the **C1-TIERPRFC** algorithm type.
- An algorithm defined using the **C1-FICRETBC** algorithm type.

Procedure

To associate an algorithm with an additional fee pricing rule type:

1. Ensure that the **Algorithms** section is expanded when you are defining *o*r editing the additional fee pricing rule type.

   The **Algorithms** section contains the following columns in a grid:

Column Name	Column Description	Mandatory (Yes or No)
System Event	Used to indicate the system event when you want to invoke the algorithm. The valid values are: • **Account and Price Item Derivation** - Used to derive the account and price item for a membership. • **Bill Group Derivation** - Used to derive the bill group, parent customer, and policy for a membership. • **Create Subscription Tier** - Used to derive the subscription tier for a membership • **Tier Based Premium Calculation** - Used to calculate the COBRA administrative fees for each eligible member person. • **Fetch Bill Period of Billable Charge of Membership** - Used to derive the bill period for an account. • **Bill Period Time Line Creation** - Used to create the SQI based billable charges for each membership and price item combination. • **Calculate Proration Factor for Tier Based Pricing Rule** - Used to prorate the calculated COBRA administrative fees as per the proration factor. • **Fully Insured Charge Creation for Memberships** - Used to create the SQI based billable charges for each membership and price item combination.	Yes **Note:** This field is required when you are associating an algorithm with the additional fee pricing rule type.
Sequence	Used to specify the order in which the algorithms for each system event must be executed.	Yes (Conditional) **Note:** This field is required when you are associating an algorithm with the additional fee pricing rule type.

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Column Name	Column Description	Mandatory (Yes or No)
Algorithm	Used to specify the algorithm.	Yes (Conditional)
	Note: Once you select the system event, the **Search** (🔍) icon appears corresponding to the **Algorithm** field. On clicking the **Search** (🔍) icon, the **Algorithm Search** window appears. On specifying the algorithm, the description of the algorithm appears corresponding to the **Algorithm** field.	**Note:** This field is required when you are associating an algorithm with the additional fee pricing rule type.

2. Enter the following details in the **Algorithms** section:

System Event	Algorithm	Algorithm Type	Description
Account and Price Item Derivation	C1_ACCPRIMEM	C1_ACCPRIMEM	Account and PriceItem Derivation for Membership
Bill Group Derivation	C1_MEMBGDRV	C1_MEMBGDRV	Bill Group Derivation for Membership
Derive Subscription Tier for Membership	C1-DERSUBTR	C1-DERSUBTR	Create Subscription Tier
Pricing Rule Type Premium Calculation	C1_TIERPREM	C1_TIERPREM	Tier Based Premium Calculation
Pricing Rule BC Creation Pre Processing	C1-FIBCBP	C1-FIBCBP	Fetch Bill Period of Billable Charge of Membership
Account and Price Item Derivation Post-Processing	C1-BILLRPCR	C1-BILLRPCR	Bill Period Time Line Creation
Calculate Proration Factor for Tier Based Pricing Rule	C1-TIERPRFC	C1-TIERPRFC	Calculate Proration Factor for Tier Based Pricing Rule
Pricing Rule Billable Charge Creation	C1-FICRETBC	C1-FICRETBC	Pass Through Billable Charge Creation

3. If you want to associate more than one algorithm with the additional fee pricing rule type, click the **Add** (+) icon and then repeat step 2.

Note: However, if you want to disassociate an algorithm from the additional fee pricing rule type, click the **Delete** (🗑) icon corresponding to the algorithm.

4. Click **Save**.
   The algorithms are associated with the additional fee pricing rule type.

Related Topics

For more information on...	See...
How to define an additional fee pricing rule type	Defining an Additional Fee Pricing Rule Type on page 3421
How to edit an additional fee pricing rule type	Editing an Additional Fee Pricing Rule Type on page 3431

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Adding a Price Item in an Additional Fee Pricing Rule Type

Prerequisites

To add a price item in an additional fee pricing rule type, you should have:

- Price item defined in the application
- Rate option defined in the **Rate Option (C1-ExtLookRetTypeRateOpt)** extendable lookup
- Values defined for the **Invoice Type (C1INVTYP)** characteristic type
- The **C1INVTYP** characteristic type set in the **Invoice Type Characteristic Type** option type of the **C1-ASOBLLNG** feature configuration
- Rule types defined in the application (where the rule type usage is set to **Price Item Eligibility**)

Procedure

To add a price item in an additional fee pricing rule type:

1. Ensure that the **Price Items** section is expanded when you are defining or editing an additional fee pricing rule type.

   The **Price Items** section contains the following fields in a grid:

<table>
<tr><th>Field Name</th><th>Field Description</th><th>Mandatory (Yes or No)</th></tr>
<tr><td rowspan="3">Price Item</td><td>Used to indicate the price item that you want to include in the additional fee pricing rule type.</td><td>Yes (Conditional)</td></tr>
<tr><td>Note:
The Search (🔍) icon appears corresponding to the Price Item field. On clicking the Search icon, the Price Item Search window appears.
On specifying the price item, the description of the price item appears corresponding to the Price Item field.</td><td>Note: This field is required when you are adding a rate option and bill to account in an additional fee pricing rule type.</td></tr>
<tr><td></td><td></td></tr>
<tr><td>Rate Option</td><td>Used to indicate one or more rate options which are valid for a price item.
On clicking the Add (+) icon, the following field appears in a grid:
<table>
<tr><th>Field Name</th><th>Field Description</th><th>Mandatory (Yes or No)</th></tr>
<tr><td>Rate Option</td><td>Used to indicate the rate option that you want to use while defining pricing for the price item.</td><td>Yes</td></tr>
</table>
Note:
If you want to define more than one rate option to the price item in an additional fee pricing rule type, click the Add (+) icon.
However, if you want to remove a price item from an additional fee pricing rule type, click the Delete (🗑) icon corresponding to the Rate Option field.</td><td>Not applicable</td></tr>
</table>

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<table>
<tr><th>Field Name</th><th>Field Description</th><th>Mandatory (Yes or No)</th></tr>
<tr><td>Bill To Account</td><td>Used to indicate a order in which the account should be considered while deriving a transaction leg.

On clicking the Add (+) icon, the following fields appear in a grid:

<table>
<tr><th>Field Name</th><th>Field Description</th><th>Mandatory (Yes or No)</th></tr>
<tr><td>Priority</td><td>Used to specify the order in which the invoice type is considered for a price item.</td><td>Yes</td></tr>
<tr><td>Invoice Type</td><td>Used to indicate the type which is considered for billing. For more information, refer to the Bill Group's Account on page 13 section.

Note: The Search (🔍) icon appears corresponding to the Invoice Type field. On clicking the Search icon, the Invoice Type Search window appears.</td><td>Yes</td></tr>
</table>

Note:

If you want to define more than one invoice type to the price item in an additional fee pricing rule type, click the Add (+) icon.

However, if you want to remove a invoice type from the price item in an additional fee pricing rule type, click the Delete (🗑) icon corresponding to the Priority field.</td><td>Not applicable</td></tr>
<tr><td>Eligibility Rule Type</td><td>Used to indicate the rule type (which indicates the rules) that should be executed to determine whether the price item is eligible for billing.</td><td>No</td></tr>
</table>

2. Enter the required details in the **Price Items** section.
3. If you want to define more than one price item in an additional fee pricing rule type, click the **Add** (+) icon and then repeat step 2.

Note: However, if you want to remove a price item from an additional fee pricing rule type, click the **Delete** (🗑) icon corresponding to the **Price Item** field.

4. Click **Save**.
   The price items are added for an additional fee pricing rule type.

Related Topics

For more information on...	See...
How to define an additional fee pricing rule type	Defining an Additional Fee Pricing Rule Type on page 3421

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For more information on...	See...
How to edit an additional fee pricing rule type	Editing an Additional Fee Pricing Rule Type on page 3431

Adding a Price Item Parameter in an Additional Fee Pricing Rule Type

Prerequisites

To add a price item parameter in an additional fee pricing rule type, you should have:

- Parameter defined in the application where parameter usage is set to **Price Item**.
- Parameter associated with the price item.

Procedure

To add a price item parameter in an additional fee pricing rule type:

1. Ensure that the **Price Item Parameters** section is expanded when you are defining *o*r editing an additional fee pricing rule type.

   The **Price Item Parameters** section contains the following fields in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Price Item Parameter	Used to specify the parameter which you can use while defining an additional fee pricing for the price item.	Yes (Conditional)
	Note: The **Search** (🔍) icon appears corresponding to the **Price Item Parameter** field. On clicking the **Search** (🔍) icon corresponding to the **Price Item Parameter** field, the **Parameter Search** window appears. On specifying the parameter, the description of the price item parameter appears corresponding to the **Price Item Parameter** field.	**Note:** This field is required when you are adding a price item parameter in an additional fee pricing rule type.

2. Enter the required details in the **Price Item Parameters** section.
3. If you want to add more than one price item parameter in an additional fee pricing rule type, click the **Add** (+) icon and then repeat step 2.

   Note: However, if you want to remove a price item parameter from an additional fee pricing rule type, click the **Delete** (🗑) icon corresponding to the price item parameter.

4. Click **Save**.
   The price item parameter is added for an additional fee pricing rule type.

Related Topics

For more information on...	See...
How to define an additional fee pricing rule type	Defining an Additional Fee Pricing Rule Type on page 3421
How to edit an additional fee pricing rule type	Editing an Additional Fee Pricing Rule Type on page 3431

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Defining a Characteristic for an Additional Fee Pricing Rule Type

Prerequisites

To define a characteristic for an additional fee pricing rule type, you should have:

- Characteristic types defined in the application (where the characteristic entity is set to **Pricing Rule Type**)

Procedure

To define a characteristic for an additional fee pricing rule type:

1. Ensure that the **Characteristics** section is expanded when you are defining *or* editing an additional fee pricing rule type.

   The **Characteristics** section contains the following columns in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Characteristic Type	Used to indicate the characteristic type.	Yes (Conditional)
	Note: The list includes only those characteristic types where the characteristic entity is set to **Pricing Rule Type**.	**Note:** This field is required when you are defining a characteristic for an additional fee pricing rule type.
Characteristic Value	Used to specify the value for the characteristic type.	Yes (Conditional)
	Note: If you select a predefined characteristic type, the **Search** (🔍) icon appears corresponding to the **Characteristic Value** field. On clicking the **Search** icon, the **Predefined Characteristic Search** window appears. On specifying the value for a predefined characteristic type, the description of the characteristic value appears corresponding to the **Characteristic Value** field.	**Note:** This field is required when you are defining a characteristic for an additional fee pricing rule type.

2. Enter the required details in the **Characteristics** section.
3. If you want to define more than one characteristic for an additional fee pricing rule type, click the **Add** (+) icon and then repeat step 2.

   Note: However, if you want to remove a characteristic from an additional fee pricing rule type, click the **Delete** (🗑) icon corresponding to the characteristic.

4. Click **Save**.
   The characteristics are defined for an additional fee pricing rule type.

Related Topics

For more information on...	See...
How to define an additional fee pricing rule type	Defining an Additional Fee Pricing Rule Type on page 3421
How to edit an additional fee pricing rule type	Editing an Additional Fee Pricing Rule Type on page 3431

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Adding Elements for Audit in an Additional Fee Pricing Rule Type

Prerequisites

To add elements for audit in an additional fee pricing rule type, you should have:

- Business Object **C1-AuditEventType** defined for the pricing rule type.
- Audit event type defined in the application.

Procedure

To add elements for audit in an additional fee pricing rule type:

1. Ensure that the **Event Management** section is expanded when you are defining *o*r editing an additional fee pricing rule type.

   The **Event Management** section contains the following fields in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Audit Event Type	Used to specify the audit event type which you can use while adding elements for audit in an additional fee pricing rule type. **Note:** The **Search** (🔍) icon appears corresponding to the **Audit Event Type** field. On clicking the **Search** (🔍) icon corresponding to the **Audit Event Type** field, the **Audit Event Type Search** window appears. On specifying the audit event type, the description of the audit event type appears corresponding to the **Audit Event Type** field.	Yes
Element Type	Used to indicate the type of audit element for an additional fee pricing rule type. The valid values are: • Business Object Status • Characteristic • Field	Not applicable
Element Name	Used to specify the element name for an additional fee pricing rule type. **Note:** The **Search** (🔍) icon appears corresponding to the **Element Name** field. On clicking the **Search** (🔍) icon corresponding to the **Element Name** field, the **Audit Event Type Element Name Search** window appears.	Yes
Element Value	Used to specify the value for an element name.	Not applicable

2. Enter the required details in the **Event Management** section.
3. If you want to add more than one element for audit in an additional fee pricing rule type, click the **Add** (+) icon and then repeat step 2.

   Note: However, if you want to remove an element for audit from an additional fee pricing rule type, click the **Delete** (🗑) icon corresponding to the **Audit Event Type** field.

4. Click **Save**.

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The elements for audit are added for an additional fee pricing rule type.

Related Topics

For more information on...	See...
How to define an additional fee pricing rule type	Defining an Additional Fee Pricing Rule Type on page 3421
How to edit an additional fee pricing rule type	Editing an Additional Fee Pricing Rule Type on page 3431

Editing an Additional Fee Pricing Rule Type

Prerequisites

To edit an additional fee pricing rule type, you should have:

- Additional fee pricing rule type business object defined in the application.
- Additional fee pricing rule business object defined in the application.

Procedure

To edit an additional fee pricing rule type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **P** and then click **Pricing Rule Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Pricing Rule Type** sub-menu.
   The **Pricing Rule Type** screen appears.
4. In the **Pricing Rule Type List** zone, click the **Edit** (✎) icon in the **Edit** column corresponding *t*o the pricing rule type whose details you want to edit.

   The **Tier Based Pricing Rule Type** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details about an additional fee pricing rule type.
   - **Algorithms** - Used to associate the algorithms with an additional fee pricing rule type.
   - **Price Items** - Used to add the price items for which you can define the pricing rules using the additional fee pricing rule type.
   - **Price Item Parameters** - Used to add the price item parameters based on which you want to define the price item pricing.
   - **Characteristics** - Used to define the characteristics for an additional fee based pricing rule type.
   - **Event Management** - Used to configure the audit in an additional fee based pricing rule type.

   The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Pricing Rule Type	Displays the additional fee pricing rule type.	Not applicable
Description	Used to specify the description for the additional fee pricing rule type.	Yes
Detailed Description	Used to specify the additional information about the additional fee pricing rule type.	No
Pricing Rule Business Object	Used to indicate the business object using which you want to create the additional fee pricing rule type. The valid value is:	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	• Additional Fee Pricing Rule	
Business Object	Indicates the business object using which you are defining the additional fee pricing rule type.	Not applicable
Status	Used to indicate the status of additional fee pricing rule type. The valid values are: • Active • Inactive	Yes
Primary	Used to select the checkbox if the pricing rule type is primary. **Note:** The checkbox appears selected, if you have already selected the **Primary** option while defining an additional fee pricing rule type.	No
Pricing Rule Type Category	Indicates the pricing rule type category for an additional fee pricing rule type. The valid values is: • Additional Fee	No

Tip: Alternatively, you can edit the details of an additional fee pricing rule type by clicking the **Edit** button in the **Pricing Rule Type** zone.

5. Modify the details in the **Main** section.
6. Associate the required algorithms in an additional fee pricing rule type.
7. Add, edit, or remove the required price items in an additional fee pricing rule type.
8. Add, edit, or remove the price item parameters in an additional fee pricing rule type, if required.
9. Add, edit, or remove characteristics for an additional fee pricing rule type, if required.
10. Add, edit, or remove the configuration details of the audit in an additional fee pricing rule type.
11. Click **Save**.
    The changes made to the an additional fee pricing rule type are saved.

Related Topics

For more information on...	See...
How to associate algorithms with an additional fee pricing rule type	Associating an Algorithm with an Additional Fee Pricing Rule Type on page 3424
How to add price items in an additional fee pricing rule type	Adding a Price Item in an Additional Fee Pricing Rule Type on page 3426
How to add price item parameters in an additional fee pricing rule type	Adding a Price Item Parameter in an Additional Fee Pricing Rule Type on page 3428
How to define a characteristic for an additional fee pricing rule type	Defining a Characteristic for an Additional Fee Pricing Rule Type on page 3429
How to add elements for audit in an additional fee pricing rule type	Adding Elements for Audit in an Additional Fee Pricing Rule Type on page 3430

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Deleting an Additional Fee Pricing Rule Type

Procedure

To delete an additional fee based pricing rule type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **P** and then click **Pricing Rule Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Pricing Rule Type** sub-menu.
   The **Pricing Rule Type** screen appears.
4. In the **Pricing Rule Type List** zone, click the **Delete** ( ) icon in the **Delete** column *c*orresponding to the additional fee pricing rule type that you want to delete.
   A message appears confirming whether you want to delete the additional fee pricing rule type.

   Note: You can delete an additional fee pricing rule type when it is not yet used in the system.

   Tip: Alternatively, you can delete an additional fee pricing rule type by clicking the **Delete** button in the **Pricing Rule Type** zone.
5. Click **OK**.
   The additional fee pricing rule type is deleted.

Related Topics

For more information on...	See...
Pricing Rule Type screen	Pricing Rule Type on page 2942
Pricing Rule Type List zone	Pricing Rule Type List on page 2943
Pricing Rule Type zone	Pricing Rule Type on page 2946

Viewing the Additional Fee Pricing Rule Type Details

Procedure

To view the details of an additional fee pricing rule type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **P** and then click **Pricing Rule Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Pricing Rule Type** sub-menu.
   The **Pricing Rule Type** screen appears.
4. In the **Pricing Rule Type List** zone, click the **Broadcast** ( ) icon corresponding to the additional fee pricing rule type whose details you want to view.
   The **Pricing Rule Type** zone appears.
5. View the details of the an additional fee pricing rule type in the **Pricing Rule Type** zone.

Related Topics

For more information on...	See...
Pricing Rule Type screen	Pricing Rule Type on page 2942

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For more information on...	See...
Pricing Rule Type List zone	Pricing Rule Type List on page 2943
Pricing Rule Type zone	Pricing Rule Type on page 2946

Membership Benefit Pricing

Oracle Revenue Management and Billing offers a benefit pricing rule type using which you can determine the following:

- Price items that should be used to create charges for different membership benefits, such as Medicare Part D LIS, Medicare Part D LEP, APTC benefit, etc.
- Eligibility rule type for the respective price item.
- Active audit event type of the **C1-Benefits** business object using which the system should create an audit event whenever the listed elements (such as benefit end date, benefit amount) are updated or when the status of the membership benefit is set to **ACTIVE** (during creation), **INACTIVE** (during modification), or **DISCARD** (when it is discontinued).

Note: The fields and statuses of a membership benefit which you specify in the **Event Management** section of a benefit pricing rule type should also exits as audit elements for update in the selected audit event type.

The **Benefit Pricing Rule Type (C1-PrcRuleTypeBenefit)** business object is shipped with the product. You need to create a benefit pricing rule type using the **Benefit Pricing Rule Type** business object. You can create the benefit charges for Medicare Part D LIS, Medicare Part D LEP, APTC benefit using the benefit pricing rule type. In this way, you can create a benefit charge for the low income subsidy (LIS) and late enrollment penalty (LEP) along with the Medicare Part D premium charge (which is calculated using the age-based or tier based pricing rule).

While creating a benefit charge for the membership, the system considers the benefit pricing rule type which is associated with the health plan or policy plan. The associated benefit pricing rule type should be added as a related pricing rule type in the age-based or tier-based pricing rule type which is associated with the health plan or policy plan. Therefore, while creating a benefit pricing rule type, you need to ensure that the **Primary** option is not selected and the pricing rule type category is set to **Benefit**. You need to then add the benefit pricing rule type as a related pricing rule type in the required age-based or tier-based pricing rule type.

While specifying an eligibility rule type for a price item, you need to ensure that the rule type usage of the rule type is set to **Price Item Eligibility**. Before creating rules for the eligibility rule type, you need to create a parameter where the source entity is set to **Benefit**, source type is set to **Field**, source type code is set to **Benefit Sub Type**, and the **Rule Eligibility Criteria** option is selected. While creating rules for the eligibility rule type, you need to ensure that the benefit sub type parameter is set to the required benefit sub type. While creating a benefit charge for the membership, the system executes the effective rules of the eligibility rule type in the order of priority. If the rule criteria is met by the group or individual membership (i.e. benefit sub type of the group or individual membership benefit matches with the rule criteria), the system considers the respective price item to create the charge for the membership benefit.

While creating a benefit pricing rule type, you must attach the following algorithms to the respective system events:

System Event	Sequence	Algorithm
Account and Price Item Derivation	1	C1_ACCPRIMEM
Account and Price Item Derivation Post-Processing	1	C1-BILLPDRV
Account and Price Item Derivation Post-Processing	2	C1-BILLRPCR
Bill Group Derivation	1	C1_MEMBGDRV
Billable Charge Creation Post-Processing	1	C1-FICRETBC
Premium Calculation	1	C1_MEDIPREM

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System Event	Sequence	Algorithm
Billable Charge Creation Post-Processing	2	C1-PRLBCVLD

Note:

The system requires the **C1-PRLBCVLD** algorithm only when the **Validate External Price** option is selected in the benefit sub type of a membership benefit for which the benefit charge is created.

If you attach the **C1-PRLBCVLD** algorithm in a benefit pricing rule type, you need to ensure that it is also attached in the primary pricing rule type (i.e. age-based or tier-based) through the membership premium is calculated.

Defining a Benefit Pricing Rule Type

Procedure

To define a benefit pricing rule type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **P** and then click **Pricing Rule Type**.
   A sub-menu appears.
3. Click the **Add** option from the **Pricing Rule Type** sub-menu.

   The **Select Business Object** screen appears. It contains the following field:

Field Name	Field Description	Mandatory (Yes or No)
Pricing Rule Type Business Object	Used to indicate the business object using which you want to create the benefit pricing rule type. **Note:** You can create a benefit pricing rule type using the **Benefit Pricing Rule Type (C1-PrcRuleTypeBenefit)** business object.	Yes

Tip: Alternatively, you can access this screen by clicking the **Add** button in the **Page Title** area of the **Pricing Rule Type** screen.

4. Select the **Benefit Pricing Rule Type** business object.
5. Click **OK**.

   The **Benefit Pricing Rule Type** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details about the benefit pricing rule type.
   - **Algorithms** - Used to associate the algorithms with the benefit pricing rule type.
   - **Price Items** - Used to add the price items using which you want to create charges for different membership benefits.
   - **Price Item Parameters** - This section is not applicable for the benefit pricing rule type.
   - **Characteristics** - Used to define the characteristics for the benefit pricing rule type.
   - **Event Management** - Used to list the elements from the **Benefit (C1-Benefits)** business object which you want to monitor for auditing while updating a membership benefit.

   The **Main** section contains the following fields:

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Field Name	Field Description	Mandatory (Yes or No)
Pricing Rule Type	Used to specify the benefit pricing rule type.	Yes
Description	Used to specify the description for the benefit pricing rule type.	Yes
Detailed Description	Used to specify the additional information about the benefit pricing rule type.	No
Pricing Rule Business Object	Used to indicate the business object using which you want to create the benefit pricing rule. The valid value is: • **Benefit Pricing Rule** **Note:** You can create a benefit pricing rule type using the age based or tier based pricing rule business object.	Yes
Business Object	Indicates the business object using which you are defining the benefit pricing rule type.	Not applicable
Status	Used to indicate the status of the benefit pricing rule type. The valid values are: • Active • Inactive	Yes
Primary	Used to indicate whether the pricing rule type is a primary pricing rule type. **Note:** You must not select the **Primary** option while defining the benefit pricing rule type.	Not applicable
Pricing Rule Type Category	Used to indicate the category to which the pricing rule type belongs. The valid value is: • Benefit	Yes

6. Enter the required details in the **Main** section.
7. Ensure that **Primary** option is not selected when you are defining a benefit pricing rule type.
8. Associate the required algorithms with the benefit pricing rule type.
9. Add the required price items for the benefit pricing rule type.
10. Add price item parameters for the benefit pricing rule type.
11. Define characteristics for the benefit pricing rule type.
12. Configure the audit in the benefit pricing rule type.
13. Click **Save**.
    The benefit pricing rule type is defined.

Related Topics

For more information on...	See...
Pricing Rule Type screen	Pricing Rule Type on page 2942
How to associate algorithms with the benefit pricing rule type	Associating Algorithms with a Benefit Pricing Rule Type on page 3437

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For more information on...	See...
How to add pricing items in the benefit pricing rule type	Adding a Price Item in a Benefit Pricing Rule Type on page 3439
How to add price item parameters in the benefit pricing rule type	Adding a Price Item Parameter in a Benefit Pricing Rule Type
How to define a characteristic for the benefit pricing rule type	Defining a Characteristic for a Benefit Pricing Rule Type on page 3441
How to define event management for the benefit pricing rule type	Adding Elements for Audit in a Benefit Pricing Rule Type on page 3442

Associating Algorithms with a Benefit Pricing Rule Type

Prerequisites

To associate algorithms with a benefit pricing rule type, you should have:

- Required algorithms should be defined in the application

Procedure

To associate algorithms with a benefit pricing rule type:

1. Ensure that the **Algorithms** section is expanded when you are defining the benefit pricing rule type.

   The **Algorithms** section contains the following columns in a grid:

Column Name	Column Description	Mandatory (Yes or No)
System Event	Used to indicate the system event when you want to invoke the algorithm. The valid values are: • Account and Price Item Derivation • Account and Price Item Derivation Post-Processing • Bill Group Derivation • Billable Charge Creation Pre-Processing • Billable Charge Creation Post-Processing • New Born Waiver Calculation • Premium Calculation • Pricing Rule Derivation • Pricing Rule Pre-Processing • Pricing Rule Post-Processing • Pricing Rule Proration Amount Calculation • Skip Month Premium Calculation	Yes **Note:** This field is required when you want to associate an algorithm with the benefit pricing rule type.

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Column Name	Column Description	Mandatory (Yes or No)
	Note: The remaining system events are not applicable for the fully-insured group and individual businesses. The **New Born Waiver Calculation**, **Pricing Rule Derivation**, **Pricing Rule Pre-Processing**, **Pricing Rule Post-Processing**, **Pricing Rule Proration Amount Calculation**, **Skip Month Premium Calculation** system events are not applicable for the **Benefit** pricing rule type category.	
Sequence	Used to specify the order in which the algorithms for each system event must be executed.	Yes (Conditional) **Note:** This field is required when you want to associate an algorithm with the benefit pricing rule type.
Algorithm	Used to specify the algorithm.	Yes (Conditional)
	Note: If you select the system event option, the **Search** (🔍) icon appears corresponding to the **Algorithm** field. On clicking the **Search** (🔍) icon, the **Algorithm Search** window appears. On specifying the algorithm, the description of the algorithm appears corresponding to the **Algorithm** field.	**Note:** This field is required when you want to associate an algorithm with the benefit pricing rule type.

2. Enter the required details in the **Algorithms** section:

System Event	Sequence	Algorithm Type
Account and Price Item Derivation	1	C1_ACCPRIMEM
Account and Price Item Derivation Post-Processing	1	C1-BILLPDRV
Account and Price Item Derivation Post-Processing	2	C1-BILLRPCR
Bill Group Derivation	1	C1_MEMBGDRV
Billable Charge Creation Post-Processing	1	C1-FICRETBC
Premium Calculation	1	C1_MEDIPREM
Billable Charge Creation Post Processing	2	C1-PRLBCVLD

3. If you want to associate more than one algorithm for the benefit pricing rule type, click the **Add** (+) icon and then repeat step 2.

Note: However, if you want to disassociate an algorithm from the benefit pricing rule type, click the **Delete** (🗑) icon corresponding to the algorithm.

4. Click **Save**.
The algorithms are associated with the benefit pricing rule type.

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Related Topics

For more information on...	See...
How to define a benefit pricing rule type	Defining a Benefit Pricing Rule Type on page 3435
How to edit the benefit pricing rule type	Editing a Benefit Pricing Rule Type on page 3444
How to delete the benefit pricing rule type	Deleting a Benefit Pricing Rule Type on page 3445

Adding a Price Item in a Benefit Pricing Rule Type

Prerequisites

To add a price item in a benefit pricing rule type, you should have:

- Price item defined in the application
- Values defined for the **Invoice Type (C1INVTYP)** characteristic type
- The **C1INVTYP** characteristic type set in the **Invoice Type Characteristic Type** option type of the **C1-ASOBLLNG** feature configuration
- Rule types defined in the application (where the rule type usage is set to **Price Item Eligibility**)

Procedure

To add a price item in a benefit pricing rule type:

1. Ensure that the **Price Items** section is expanded when you are defining or editing a benefit based pricing rule type.

   The **Price Items** section contains the following fields in a grid:

<table>
<tr><th>Field Name</th><th>Field Description</th><th>Mandatory (Yes or No)</th></tr>
<tr><td>Price Item</td><td>Used to indicate the price item that you want to include in a benefit pricing rule type.

Note:
The Search (🔍) icon appears corresponding to the Price Item field. On clicking the Search icon, the Price Item Search window appears.
On specifying the price item, the description of the price item appears corresponding to the Price Item field.</td><td>Yes</td></tr>
<tr><td>Bill To Account</td><td>Used to indicate the priority in which the account should be considered while creating a benefit charge using the price item.
On clicking the Add (➕) icon, the following fields appear in a grid:
<table>
<tr><th>Field Name</th><th>Field Description</th><th>Mandatory (Yes or No)</th></tr>
<tr><td>Priority</td><td>Used to indicate the order in which the system should consider the account with the respective invoice type.</td><td>Yes</td></tr>
</table></td><td>Not applicable</td></tr>
</table>

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<table>
<tr><th>Field Name</th><th>Field Description</th><th>Mandatory (Yes or No)</th></tr>
<tr><td></td><td>
<table>
<tr><th>Field Name</th><th>Field Description</th><th>Mandatory (Yes or No)</th></tr>
<tr><td>Invoice Type</td><td>Used to indicate the invoice account type. The system will then consider the available invoice account type of the customer to bill the benefit charges based on the given priority. For more information, refer to the Bill Group's Account on page 13 section.

Note:
The Search (🔍) icon appears corresponding to the Invoice Type field. On clicking the Search icon, the Invoice Type Search window appears.
Here, you can only specify a predefined value of the C1INVTYP characteristic type.</td><td>Yes</td></tr>
</table>
Note:
If you want to define more than one invoice account types for a price item in the benefit pricing rule type, click the Add (+) icon.
However, if you want to remove an invoice account type from a price item in the benefit pricing rule type, clickDelete (🗑) icon corresponding to the Priority field.
</td><td></td></tr>
<tr><td>Eligibility Rule Type</td><td>Used to indicate the rule type using which you want to determine whether the price item is eligible for billing.

Note: Here, you can only specify a rule type where the rule type usage is set to Price Item Eligibility.</td><td>No</td></tr>
</table>

2. Enter the required details in the **Price Items** section.
3. If you want to define more than one price item in a benefit pricing rule type, click the **Add** (+) icon and then repeat step 2.

Note: However, if you want to remove a price item from a benefit pricing rule type, click the **Delete** (🗑) icon corresponding to the **Price Item** field.

4. Click **Save**.
   The price items are added for a benefit pricing rule type.

Related Topics

For more information on...	See...
How to define a benefit pricing rule type	Defining a Benefit Pricing Rule Type on page 3435

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For more information on...	See...
How to edit a benefit pricing rule type	Editing a Benefit Pricing Rule Type on page 3444

Defining a Characteristic for a Benefit Pricing Rule Type

Prerequisites

To define a characteristic for a benefit pricing rule type, you should have:

- Characteristic types defined in the application (where the characteristic entity is set to **Pricing Rule Type**)

Procedure

To define a characteristic for a benefit pricing rule type:

1. Ensure that the **Characteristics** section is expanded when you are defining *or* editing a benefit pricing rule type.

   The **Characteristics** section contains the following columns in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Characteristic Type	Used to indicate the characteristic type.	Yes (Conditional)
	Note: The list includes only those characteristic types where the characteristic entity is set to **Pricing Rule Type**.	**Note:** This field is required when you are defining a characteristic for a benefit pricing rule type.
Characteristic Value	Used to specify the value for the characteristic type.	Yes (Conditional)
	Note: On specifying the value for a predefined characteristic type, the description of the characteristic value appears corresponding to the **Characteristic Value** field.	**Note:** This field is required when you are defining a characteristic for a benefit pricing rule type.

2. Enter the required details in the **Characteristics** section.

   Note: If you select a predefined characteristic type, the **Search** (🔍) icon appears corresponding to the **Characteristic Value** field. On clicking the **Search** icon, you can search for a predefined characteristic value.

3. If you want to define more than one characteristic for a benefit pricing rule type, click the **Add** (+) icon and then repeat step 2.

   Note: However, if you want to remove a characteristic from a benefit pricing rule type, click the **Delete** (🗑) icon corresponding to the characteristic.

4. Click **Save**.
   The characteristics are defined for a benefit pricing rule type.

Related Topics

For more information on...	See...
How to define a benefit pricing rule type	Defining a Benefit Pricing Rule Type on page 3435
How to edit a benefit pricing rule type	Editing a Benefit Pricing Rule Type on page 3444

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Adding Elements for Audit in a Benefit Pricing Rule Type

Prerequisites

To add elements for audit in a benefit pricing rule type, you should have:

- Business Object **C1-AuditEventType** defined for the pricing rule type.
- Audit event type defined in the application.

Procedure

To add elements for audit in a benefit pricing rule type:

1. Ensure that the **Event Management** section is expanded when you are defining *o*r editing a benefit pricing rule type.

   The **Event Management** section contains the following fields in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Audit Event Type	Used to indicate an active audit event type using which you want to create an audit event when the specified element of a membership benefit is updated. **Note:** The **Search** (🔍) icon appears corresponding to the **Audit Event Type** field. On clicking the **Search** (🔍) icon corresponding to the **Audit Event Type** field, the **Audit Event Type Search** window appears. On specifying the audit event type, the description of the audit event type appears corresponding to the **Audit Event Type** field. You must specify an active audit event type which is created for the **C1-Benefits** business object.	Yes
Element Type	Used to indicate the type of element. The valid values are: • Business Object Status • Characteristic • Field	Not applicable
Element Name	Used to specify the element that you want to monitor while updating a membership benefit. The following table lists the elements which you can select for the respective element type: **Element Type** / **Element Name** Business Object Status / boStatus Characteristic / characteristics/characteristicsList/characteristicType Field / Any field from the **C1-Benefits** business object schema. **Note:** Here, you must not specify an element whose type is set to group or list.	Yes

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<table>
<tr><th>Field Name</th><th>Field Description</th><th>Mandatory (Yes or No)</th></tr>
<tr><td></td><td>Note:
The Search (🔍) icon appears corresponding to the Element Name field. On clicking the Search (🔍) icon corresponding to the Element Name field, the Audit Event Type Element Name Search window appears.</td><td></td></tr>
<tr><td>Element Value</td><td>Used to specify the element value depending on the element type. The following table lists the element value that you must specify depending on the element type:
<table>
<tr><th>Element Type</th><th>Element Value</th></tr>
<tr><td>Business Object Status</td><td>Used to indicate the status of the membership benefit business object which you want to monitor for auditing. The system then creates an audit event whenever the membership benefit is transitioned to the specified status.</td></tr>
<tr><td rowspan="2">Characteristic</td><td>Used to indicate the characteristic type which you want to monitor for auditing</td></tr>
<tr><td>Note: Here, you must specify a characteristic type where the characteristic entity is set to Benefits. The system then creates an audit event whenever the specified characteristic is defined, edited, or removed from the membership benefit.</td></tr>
<tr><td rowspan="2">Field</td><td>Used to indicate the field which you want to monitor for auditing.</td></tr>
<tr><td>Note: Here, you must specify a field from the C1-Benefits business object schema.</td></tr>
</table></td><td>Not applicable</td></tr>
</table>

2. Enter the required details in the **Event Management** section.
3. If you want to add more than one element for audit in a benefit pricing rule type, click the **Add** (+) icon and then repeat step 2.

Note: However, if you want to remove an element for audit in a benefit pricing rule type, click the **Delete** (🗑) icon corresponding to the audit event type.

4. Click **Save**.
   The elements for audit are added for a benefit pricing rule type

Related Topics

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For more information on...	See...
How to define a benefit pricing rule type	Defining a Benefit Pricing Rule Type on page 3435
How to edit a benefit pricing rule type	Editing a Benefit Pricing Rule Type on page 3444

Editing a Benefit Pricing Rule Type

Prerequisites

To edit a benefit pricing rule type, you should have:

- Benefit pricing rule type business object defined in the application.

Procedure

To define a benefit pricing rule type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **P** and then click **Pricing Rule Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Pricing Rule Type** sub-menu.
   The **Pricing Rule Type** screen appears.
4. In the **Pricing Rule Type List** zone, click the **Edit** (✎) icon in the **Edit** column corresponding to the pricing rule type whose details you want to edit.

   The **Benefit Pricing Rule Type** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details about the benefit pricing rule type.
   - **Algorithms** - Used to associate the algorithms with the benefit pricing rule type.
   - **Price Items** - Used to add the price items for which you can define the benefit pricing rules using the benefit pricing rule type.
   - **Price Item Parameters** - This section is not applicable for the benefit pricing rule type.
   - **Characteristics** - Used to define the characteristics for the benefit pricing rule type.
   - **Event Management** - Used to define the audit event type details for the benefit pricing rule type.

   The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Pricing Rule Type	Displays the benefit pricing rule type.	Not applicable
Description	Used to specify the description for the benefit pricing rule type.	Yes
Detailed Description	Used to specify the additional information about the benefit pricing rule type.	No
Pricing Rule Business Object	Used to indicate the business object using which you want to create the benefit pricing rule type. The valid values are: • Age Based Pricing Rule • Tier Based Pricing Rule **Note:** You can create a benefit pricing rule type using the age based or tier based pricing rule business object.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
Business Object	Indicates the business object using which you are defining the benefit charge pricing rule type.	Not applicable
Status	Used to indicate the status of the benefit pricing rule type. The valid values are: • Active • Inactive	Yes
Primary	Used to indicate whether the pricing rule type is a primary pricing rule type. **Note:** You must not select the **Primary** option while defining the benefit pricing rule type.	Not applicable
Pricing Rule Type Category	Indicates the category to which the pricing rule type belongs. The valid value is: • Benefit	Not applicable

5. Enter the required details in the **Main** section.
6. Ensure that **Primary** option is not selected when you are editing a benefit pricing rule type.
7. Associate the required algorithms with the benefit pricing rule type:
8. Add, edit, or remove the required price items for the benefit pricing rule type.
9. Add, edit, or remove the price item parameters for the benefit pricing rule type.
10. Add, edit, or remove the characteristics for the benefit pricing rule type.
11. Add, edit, or remove the event management details for the benefit pricing rule type.
12. Click **Save**.
    The changes made to the benefit pricing rule type are saved.

Related Topics

For more information on...	See...
Pricing Rule Type screen	Pricing Rule Type on page 2942
How to associate algorithms with a benefit pricing rule type	Associating Algorithms with a Benefit Pricing Rule Type on page 3437
How to add pricing items in the benefit pricing rule type	Adding a Price Item in a Benefit Pricing Rule Type on page 3439
How to add price item parameters in the benefit pricing rule type	Adding a Price Item Parameter in a Benefit Pricing Rule Type
How to define a characteristic for the benefit pricing rule type	Defining a Characteristic for a Benefit Pricing Rule Type on page 3441
How to define event management for the benefit pricing rule type	Adding Elements for Audit in a Benefit Pricing Rule Type on page 3442

Deleting a Benefit Pricing Rule Type

Procedure

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To delete a benefit pricing rule type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **P** and then click **Pricing Rule Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Pricing Rule Type** sub-menu.
   The **Pricing Rule Type** screen appears.
4. In the **Pricing Rule Type List** zone, click the **Delete** (🗑) icon in the **Delete** column corresponding to the benefit pricing rule type that you want to delete.
   A message appears confirming whether you want to delete the benefit pricing rule type.

   Note: You can delete a benefit pricing rule type when it is not yet used in the system.

   Tip: Alternatively, you can delete a benefit pricing rule type by clicking the **Delete** button in the **Pricing Rule Type** zone.
5. Click **OK**.
   The benefit pricing rule type is deleted.

Related Topics

For more information on...	See...
Pricing Rule Type screen	Pricing Rule Type on page 2942
Pricing Rule Type List zone	Pricing Rule Type List on page 2943
Pricing Rule Type zone	Pricing Rule Type on page 2946

Viewing the Benefit Pricing Rule Type Details

Procedure

To view the details of a benefit pricing rule type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **P** and then click **Pricing Rule Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Pricing Rule Type** sub-menu.
   The **Pricing Rule Type** screen appears.
4. In the **Pricing Rule Type List** zone, click the **Broadcast** (📡) icon corresponding to the benefit pricing rule type whose details you want to view.
   The **Pricing Rule Type** zone appears.
5. View the details of the benefit pricing rule type in the **Pricing Rule Type** zone.

Related Topics

For more information on...	See...
Pricing Rule Type screen	Pricing Rule Type on page 2942
Pricing Rule Type List zone	Pricing Rule Type List on page 2943
Pricing Rule Type zone	Pricing Rule Type on page 2946

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Medicare Part A, Part B, and Part D Pricing

The system enables you to calculate premium for the Medicare Part A, Part B, and Part D membership benefits using the age-based or tier-based pricing rule. You can use the Medicare plan benefit package and membership benefit as the pricing parameters in the age-based or tier-based pricing rule. The system enables you to restrict the billing of a membership benefit using a parameter where the source entity is set to **Algorithm** and source type code is set to **Get benefit coverage for the given date (C1-PPRAMCOV)** in the age-based or tier-based pricing rule. In the **C1-PPRAMCOV** algorithm, you can specify the following:

- **Benefit Sub Type** - Used to indicate that the pricing for the Medicare Part A, Part B, and Part D membership benefits should be determined based on the specified value. Here, you can specify the parameter values as **A**, **B**, and/or **D** separated by a comma. For example, if the parameter is set to A, B, the system will derive the base fee where the parameter is set to AB even though the membership has availed Medicare Part D benefit. This is because you have configured the system such that Medicare Part D membership benefit should not be considered for billing.

Discount Charge Pricing for Retiree Membership

Oracle Revenue Management and Billing enables you to maintain a flat or percentage based contribution of employer or sponsor for a retiree membership through a discount charge pricing rule. A new pricing rule type category named **Discount Charge** and the new business objects named **Discount Charge Pricing Rule Type (C1-PrcRuleTypeDisChg)** and **Discount Charge Pricing Rule (C1-PricingRuleDiscount)** are introduced in this release. This enables you to create the discount charge pricing rules where you can define different base and modifier fees based on the following pricing parameters:

- Membership attributes
- Member person attributes

For the fully-insured group and individual businesses, you can create or edit a flat or percentage based discount charge pricing rule through a health care inbound message. You can define a discount charge pricing rule at the policy plan, policy, or parent customer level. The following table describes the information that you need to provide in a health care inbound message while defining or editing a discount charge pricing rule on a policy plan, policy, or parent customer:

Entity Type	**Entity Identifiers**
Policy Plan	Policy, Plan, and Source System
Policy	Policy and Source System
Parent Customer	Person Identifier Type and Person Identifier Value

For the fully-insured individual business, you can create or edit a flat or percentage based discount charge pricing rule through a health product and plan inbound message. You can define a discount charge pricing rule at the health plan level. The following table describes the information that you need to provide in a health product and plan inbound message while defining or editing a discount charge pricing rule on a health plan:

Entity Type	**Entity Identifiers**
Health Plan	Health Plan

You can view a discount charge pricing rule defined for the fully-insured group business through the **Customer 360° View** screen. However, at present, you cannot view a discount charge pricing rule defined for the fully-insured individual business from the user interface.

You can create a discount charge pricing rule using a discount charge pricing rule type. You can create a discount charge pricing rule type from the user interface and not through an inbound message. While creating a discount charge pricing

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rule type, you must the select the **Discount Charge Pricing Rule Type** business object and set the pricing rule type category to **Discount Charge**. The discount is always charged per subscriber and not per member, and therefore you must set the pricing rule type sub category to **Per Subscriber**. Here, you must specify the algorithms for the following system events:

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

In addition, you must specify the price items for which you can create discount charge pricing rules using the discount charge pricing rule type. A discount charge pricing rule type is not a primary pricing rule type. You must include a discount charge pricing rule type as a related pricing rule type in the age-based or tier based pricing rule types which are used for calculating the retiree membership premium. This is because the discount is offered on the retiree membership premium.

If the pricing type in the discount charge pricing rule is set to **Flat**, the system offers a flat discount on the retiree membership. But, if pricing type in the discount charge pricing rule is set to **Percent**, the system calculates and offers the percentage based discount on the retiree membership premium.

Prerequisites

To setup the discount charge pricing for retiree membership, you need to do the following:

- Define the **Discount Charge Pricing Rule Type (C1-PrcRuleTypeDisChg)** business object in the system.
- Define the **Discount Charge Pricing Rule (C1-PricingRuleDiscount)** business object in the system.
- Define the **Discount Charge** pricing rule type category in the system.
- Define the required algorithms in the system.
- Define the required price items and price item parameters in the system.
- Define the required rate options in the **Rate Option (C1-ExtLookRetTypeRateOpt)** extendable lookup.
- Define the required rule types (where the rule type usage is set to **Price Item Eligibility**).
- Define the required policy, policy plan, and persons in the system.
- Define the **Healthcare Product (C1-HealthcareProduct)** business object in the system.
- Define the **Health Plan (C1-HealthPlan)** business object in the system.
- Define the **Audit Event Type (C1-AuditEventType)** business object in the system.
- Define the required audit event type in the system.
- Define the required characteristic types (where the characteristic entity is set to **Pricing Rule Type**) in the system.

Defining a Discount Charge Pricing Rule Type

Prerequisites

To define a discount charge pricing rule type, you should have:

- Discount charge pricing rule type business object defined in the application.
- Discount charge pricing rule business object defined in the application.
- Pricing rule type category for the discount charge defined in the application.

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Procedure

To define a discount charge pricing rule type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **P** and then click **Pricing Rule Type**.
   A sub-menu appears.
3. Click the **Add** option from the **Pricing Rule Type** sub-menu.

   The **Select Business Object** screen appears. It contains the following field:

Field Name	Field Description	Mandatory (Yes or No)
Pricing Rule Type Business Object	Used to indicate the business object using which you want to create a discount charge pricing rule type. **Note:** You can create a discount charge pricing rule type using the **Discount Charge Pricing Rule Type** business object.	Yes

Tip: Alternatively, you can access this screen by clicking the **Add** button in the **Page Title** area of the **Pricing Rule Type** screen.

4. Select the **Discount Charge Pricing Rule Type** option from the **Pricing Rule Type Business Object** list.
5. Click **OK**.

   The **Discount Charge Pricing Rule Type** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details about the discount charge pricing rule type.
   - **Algorithms** - Used to associate the algorithms with a discount charge pricing rule type.
   - **Price Items** - Used to add the price items for which you can define the discount charge pricing rules using the discount charge pricing rule type.
   - **Price Item Parameters** - Used to add the price item parameters based on which you want to define the price item pricing.
   - **Characteristics** - Used to define the characteristics for a discount charge pricing rule type.
   - **Event Management** - Used to configure the audit in a discount charge pricing rule type.

   The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Pricing Rule Type	Used to specify the discount charge pricing rule type.	Yes
Description	Used to specify the description for the discount charge pricing rule type.	Yes
Detailed Description	Used to specify additional information about the discount charge pricing rule type.	No
Pricing Rule Business Object	Used to indicate the business object using which you want to create the discount charge pricing rule type. The valid value is: • Discount Charge Pricing Rule	Yes
Business Object	Indicates the business object using which you are defining the discount charge pricing rule type.	Not applicable

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Field Name	Field Description	Mandatory (Yes or No)
Status	Used to indicate the status of the discount charge pricing rule type. The valid values are: • Active • Inactive	Yes
Primary	Used to indicate whether the discount charge pricing rule type is a primary pricing rule type. **Note:** You must not select the **Primary** option while defining the discount charge pricing rule type.	No
Pricing Rule Type Category	Used to indicate the category to which the discount charge pricing rule type belongs. The valid value is: • Discount Charge	Yes
Pricing Rule Type Sub Category	Used to indicate the pricing rule type sub category for the discount charge pricing rule type. The valid values are: • Per Member • Per Subscriber **Note:** You must select the **Per Subscriber** option while defining the discount charge pricing rule type.	No

6. Enter the required details in the **Main** section.
7. Associate the required algorithms with the discount charge pricing rule type.
8. Add the required price items in the discount charge pricing rule type.
9. Add the price item parameters in the discount charge pricing rule type, if required.
10. Define characteristics for the discount charge pricing rule type, if required.
11. Configure the audit in the discount charge pricing rule type.
12. Click **Save**.
    The the discount charge pricing rule type is defined.

Related Topics

For more information on...	See...
How to associate algorithms with the discount charge pricing rule type	Associating an Algorithm with a Discount Charge Pricing Rule Type on page 3451
How to add price items in the discount charge pricing rule type	Adding a Price Item in a Discount Charge Pricing Rule Type on page 3452
How to add price item parameters in the discount charge pricing rule type	Adding a Price Item Parameter in a Discount Charge Pricing Rule Type on page 3455
How to define characteristics for the discount charge pricing rule type	Defining a Characteristic for a Discount Charge Pricing Rule Type on page 3455
How to add elements for audit in the discount charge pricing rule type	Adding Elements for Audit in a Discount Charge Pricing Rule Type on page 3456

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Associating an Algorithm with a Discount Charge Pricing Rule Type

Prerequisites

To associate an algorithm with a discount charge pricing rule type, you should have:

- An algorithm defined using the **C1_ACCPRIMEM** algorithm type.
- An algorithm defined using the **C1-BILLPDRV** algorithm type.
- An algorithm defined using the **C1-BILLRPCR** algorithm type.
- An algorithm defined using the **C1_MEMBGDRV** algorithm type.
- An algorithm defined using the **C1_TIERPREM** algorithm type.
- An algorithm defined using the **C1-FICRETBC** algorithm type.

Procedure

To associate an algorithm with a discount charge pricing rule type:

1. Ensure that the **Algorithms** section is expanded when you are defining *o*r editing the discount charge pricing rule type.

   The **Algorithms** section contains the following columns in a grid:

Column Name	Column Description	Mandatory (Yes or No)
System Event	Used to indicate the system event when you want to invoke the algorithm. The valid values are: • **Account and Price Item Derivation** - Used to derive the account and price item for a membership. • **Account and Price Item Derivation Post-Processing** - Used to derive the bill period for the account. • **Account and Price Item Derivation Post-Processing** - Used to create the bill period timeline for the account. • **Account and Price Item Derivation Post-Processing** - Used to derive subscription tier for membership, based on the bill period configured on the account. • **Bill Group Derivation** - Used to derive the bill group, parent customer, and policy for a membership. • **Premium Calculation** - Used to calculate the premium for each eligible member person. • **Pricing Rule Billable Charge Creation** - Used to derive the price items for which you can create the SQI based billable charges using the discount charge pricing rule type.	Yes **Note:** This field is required when you are associating an algorithm with the discount charge pricing rule type.
Sequence	Used to specify the order in which the algorithms for each system event must be executed.	Yes (Conditional) **Note:** This field is required when you are associating an algorithm with the discount charge pricing rule type.
Algorithm	Used to specify the algorithm.	Yes (Conditional)

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Column Name	Column Description	Mandatory (Yes or No)
	Note: Once you select the system event, the **Search** (🔍) icon appears corresponding to the **Algorithm** field. On clicking the **Search** (🔍) icon, the **Algorithm Search** window appears. On specifying the algorithm, the description of the algorithm appears corresponding to the **Algorithm** field.	**Note:** This field is required when you are associating an algorithm with the discount charge pricing rule type.

2. Enter the following details in the **Algorithms** section:

System Event	Algorithm	Algorithm Type	Description
Account and Price Item Derivation	C1_ACCPRIMEM	C1_ACCPRIMEM	Account and PriceItem Derivation for Membership
Account and Price Item Derivation Post-Processing	C1-BILLPDRV	C1-BILLPDRV	Bill Period Derivation
Account and Price Item Derivation Post-Processing	C1-BILLRPCR	C1-BILLRPCR	Bill Period Time Line Creation
Account and Price Item Derivation Post-Processing	C1-DERSUBTR	C1-DERSUBTR	Derive Subscription Tier for Membership
Bill Group Derivation	C1_MEMBGDRV	C1_MEMBGDRV	Bill Group Derivation for Membership
Premium Calculation	C1_TIERPREM	C1_TIERPREM	Tier Based Premium Calculation
Pricing Rule Billable Charge Creation	C1-FICRETBC	C1-FICRETBC	Fully-Insured Charge creation for Memberships

3. If you want to associate more than one algorithm with the discount charge pricing rule type, click the **Add** (+) icon and then repeat step 2.

Note: However, if you want to disassociate an algorithm from the discount charge pricing rule type, click the **Delete** (🗑) icon corresponding to the algorithm.

4. Click **Save**.
The algorithms are associated with the discount charge pricing rule type.

Related Topics

For more information on...	See...
How to define an discount charge pricing rule type	Defining a Discount Charge Pricing Rule Type on page 3448
How to edit an discount charge pricing rule type	Editing a Discount Charge Pricing Rule Type on page 3458

Adding a Price Item in a Discount Charge Pricing Rule Type

Prerequisites

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To add a price item in a discount charge pricing rule type, you should have:

- Price item defined in the application
- Rate option defined in the **Rate Option (C1-ExtLookRetTypeRateOpt)** extendable lookup
- Values defined for the **Invoice Type (C1INVTYP)** characteristic type
- The **C1INVTYP** characteristic type set in the **Invoice Type Characteristic Type** option type of the **C1-ASOBLLNG** feature configuration
- Rule types defined in the application (where the rule type usage is set to **Price Item Eligibility**)

Procedure

To add a price item in a discount charge pricing rule type:

1. Ensure that the **Price Items** section is expanded when you are defining or editing a discount charge pricing rule type.

   The **Price Items** section contains the following fields in a grid:

<table>
<tr><th>Field Name</th><th>Field Description</th><th>Mandatory (Yes or No)</th></tr>
<tr><td rowspan="3">Price Item</td><td>Used to indicate the price item that you want to include in the discount charge pricing rule type.</td><td>Yes (Conditional)</td></tr>
<tr><td>Note:
The Search (🔍) icon appears corresponding to the Price Item field. On clicking the Search icon, the Price Item Search window appears.
On specifying the price item, the description of the price item appears corresponding to the Price Item field.</td><td rowspan="2">Note: This field is required when you are adding a rate option and bill to account in a discount charge pricing rule type.</td></tr>
<tr><td></td></tr>
<tr><td>Rate Option</td><td>Used to indicate one or more rate options which are valid for a price item.
On clicking the Add (➕) icon, the following field appears in a grid:
<table>
<tr><th>Field Name</th><th>Field Description</th><th>Mandatory (Yes or No)</th></tr>
<tr><td>Rate Option</td><td>Used to indicate the rate option that you want to use while defining pricing for the price item.</td><td>Yes</td></tr>
</table>
Note:
If you want to define more than one rate option to the price item in a discount charge pricing rule type, click the Add (+) icon.
However, if you want to remove a price item from a discount charge pricing rule type, click the Delete (🗑) icon corresponding to the Rate Option field.</td><td>Not applicable</td></tr>
<tr><td>Bill To Account</td><td>Used to indicate a order in which the account should be considered while deriving a transaction leg.
On clicking the Add (➕) icon, the following fields appear in a grid:</td><td>Not applicable</td></tr>
</table>

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<table>
<tr><th>Field Name</th><th>Field Description</th><th>Mandatory (Yes or No)</th></tr>
<tr><td></td><td>
<table>
<tr><th>Field Name</th><th>Field Description</th><th>Mandatory (Yes or No)</th></tr>
<tr><td>Priority</td><td>Used to specify the order in which the invoice type is considered for a price item.</td><td>Yes</td></tr>
<tr><td>Invoice Type</td><td>Used to indicate the type which is considered for billing. For more information, refer to the Bill Group's Account on page 13 section.

Note: The Search (🔍) icon appears corresponding to the Invoice Type field. On clicking the Search icon, the Invoice Type Search window appears.</td><td>Yes</td></tr>
</table>
Note:
If you want to define more than one invoice type to the price item in a discount charge pricing rule type, click the Add (+) icon.
However, if you want to remove a invoice type from the price item in a discount charge pricing rule type, click the Delete (🗑) icon corresponding to the Priority field.
</td><td></td></tr>
<tr><td>Eligibility Rule Type</td><td>Used to indicate the rule type (which indicates the rules) that should be executed to determine whether the price item is eligible for billing.</td><td>No</td></tr>
<tr><td>Sponsored</td><td>Used to indicate that the system should consider the sponsor billing arrangement while creating and billing the charge for the price item.

Note: If the Sponsored option is not selected, the system considers retiree billing arrangement while creating and billing the charge for the price item.</td><td>No</td></tr>
</table>

2. Enter the required details in the **Price Items** section.
3. If you want to define more than one price item in a discount charge pricing rule type, click the **Add** (+) icon and then repeat step 2.

Note: However, if you want to remove a price item from a discount charge pricing rule type, click the **Delete** (🗑) icon corresponding to the **Price Item** field.

4. Click **Save**.
   The price items are added for a discount charge pricing rule type.

Related Topics

For more information on...	See...
How to define a discount charge pricing rule type	Defining a Discount Charge Pricing Rule Type on page 3448
How to edit a discount charge pricing rule type	Editing a Discount Charge Pricing Rule Type on page 3458

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Adding a Price Item Parameter in a Discount Charge Pricing Rule Type

Prerequisites

To add a price item parameter in a discount charge pricing rule type, you should have:

- Parameter defined in the application where parameter usage is set to **Price Item**.
- Parameter associated with the price item.

Procedure

To add a price item parameter in a discount charge pricing rule type:

1. Ensure that the **Price Item Parameters** section is expanded when you are defining *o*r editing a discount charge pricing rule type.

   The **Price Item Parameters** section contains the following fields in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Price Item Parameter	Used to specify the parameter which you can use while defining a discount charge pricing for the price item. **Note:** The **Search** (🔍) icon appears corresponding to the **Price Item Parameter** field. On clicking the **Search** (🔍) icon corresponding to the **Price Item Parameter** field, the **Parameter Search** window appears. On specifying the parameter, the description of the price item parameter appears corresponding to the **Price Item Parameter** field.	Yes (Conditional) **Note:** This field is required when you are adding a price item parameter in a discount charge pricing rule type.

2. Enter the required details in the **Price Item Parameters** section.
3. If you want to add more than one price item parameter in a discount charge pricing rule type, click the **Add** (+) icon and then repeat step 2.

> **Note:** However, if you want to remove a price item parameter from a discount charge pricing rule type, click the **Delete** (🗑) icon corresponding to the price item parameter.

4. Click **Save**.
   The price item parameter is added for a discount charge pricing rule type.

Related Topics

For more information on...	See...
How to define a discount charge pricing rule type	Deleting a Discount Charge Pricing Rule Type on page 3460
How to edit a discount charge pricing rule type	Editing a Discount Charge Pricing Rule Type on page 3458

Defining a Characteristic for a Discount Charge Pricing Rule Type

Prerequisites

To define a characteristic for a discount charge pricing rule type, you should have:

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- Characteristic types defined in the application (where the characteristic entity is set to **Pricing Rule Type**)

Procedure

To define a characteristic for a discount charge pricing rule type:

1. Ensure that the **Characteristics** section is expanded when you are defining *o*r editing a discount charge pricing rule type.

   The **Characteristics** section contains the following columns in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Characteristic Type	Used to indicate the characteristic type.	Yes (Conditional)
	Note: The list includes only those characteristic types where the characteristic entity is set to **Pricing Rule Type**.	**Note:** This field is required when you are defining a characteristic for a discount charge pricing rule type.
Characteristic Value	Used to specify the value for the characteristic type.	Yes (Conditional)
	Note: If you select a predefined characteristic type, the **Search** (🔍) icon appears corresponding to the **Characteristic Value** field. On clicking the **Search** icon, the **Predefined Characteristic Search** window appears. On specifying the value for a predefined characteristic type, the description of the characteristic value appears corresponding to the **Characteristic Value** field.	**Note:** This field is required when you are defining a characteristic for a discount charge pricing rule type.

2. Enter the required details in the **Characteristics** section.
3. If you want to define more than one characteristic for a discount charge pricing rule type, click the **Add** (+) icon and then repeat step 2.

   Note: However, if you want to remove a characteristic from a discount charge pricing rule type, click the **Delete** (🗑) icon corresponding to the characteristic.

4. Click **Save**.
   The characteristics are defined for a discount charge pricing rule type.

Related Topics

For more information on...	See...
How to define a discount charge pricing rule type	Defining a Discount Charge Pricing Rule Type on page 3448
How to edit a discount charge pricing rule type	Editing a Discount Charge Pricing Rule Type on page 3458

Adding Elements for Audit in a Discount Charge Pricing Rule Type

Prerequisites

To add elements for audit in a discount charge pricing rule type, you should have:

- Business Object **C1-AuditEventType** defined for the pricing rule type.

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- Audit event type defined in the application.

Procedure

To add elements for audit in a discount charge pricing rule type:

1. Ensure that the **Event Management** section is expanded when you are defining *o*r editing a discount charge pricing rule type.

   The **Event Management** section contains the following fields in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Audit Event Type	Used to specify the audit event type which you can use while adding elements for audit in a discount charge pricing rule type. **Note:** The **Search** (🔍) icon appears corresponding to the **Audit Event Type** field. On clicking the **Search** (🔍) icon corresponding to the **Audit Event Type** field, the **Audit Event Type Search** window appears. On specifying the audit event type, the description of the audit event type appears corresponding to the **Audit Event Type** field.	Yes
Element Type	Used to indicate the type of audit element for a discount charge pricing rule type. The valid values are: • Business Object Status • Characteristic • Field	Not applicable
Element Name	Used to specify the element name for a discount charge pricing rule type. **Note:** The **Search** (🔍) icon appears corresponding to the **Element Name** field. On clicking the **Search** (🔍) icon corresponding to the **Element Name** field, the **Audit Event Type Element Name Search** window appears.	Yes
Element Value	Used to specify the value for an element name. **Note:** If you select either **Business Object Status** or **Characteristic** option from the **Element Type** list, the **Search** (🔍) icon appears corresponding to the **Element Value** field. On clicking the **Search** (🔍) icon corresponding to the **Element Value** field, the **Audit Event Type Element Value Search** window appears.	Yes

2. Enter the required details in the **Event Management** section.
3. If you want to add more than one element for audit in a discount charge pricing rule type, click the **Add** (+) icon and then repeat step 2.

Note: However, if you want to remove an element for audit from a discount charge pricing rule type, click the **Delete** (🗑) icon corresponding to the **Audit Event Type** field.

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4. Click **Save**.
   The elements for audit are added for a discount charge pricing rule type.

Related Topics

For more information on...	See...
How to define a discount charge pricing rule type	Defining a Discount Charge Pricing Rule Type on page 3448
How to edit a discount charge pricing rule type	Editing a Discount Charge Pricing Rule Type on page 3458

Editing a Discount Charge Pricing Rule Type

Prerequisites

To edit a discount charge pricing rule type, you should have:

- Discount charge pricing rule type business object defined in the application.
- Discount charge pricing rule business object defined in the application.

Procedure

To edit a discount charge pricing rule type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **P** and then click **Pricing Rule Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Pricing Rule Type** sub-menu.
   The **Pricing Rule Type** screen appears.
4. In the **Pricing Rule Type List** zone, click the **Edit** (✎) icon in the **Edit** column corresponding *t*o the pricing rule type whose details you want to edit.

   The **Discount Charge Pricing Rule Type** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details about a discount charge pricing rule type.
   - **Algorithms** - Used to associate the algorithms with a discount charge pricing rule type.
   - **Price Items** - Used to add the price items for which you can define the pricing rules using the discount charge pricing rule type.
   - **Price Item Parameters** - Used to add the price item parameters based on which you want to define the price item pricing.
   - **Characteristics** - Used to define the characteristics for a discount charge based pricing rule type.
   - **Event Management** - Used to configure the audit in a discount charge based pricing rule type.

   The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Pricing Rule Type	Displays the discount charge pricing rule type.	Not applicable
Description	Used to specify the description for the discount charge pricing rule type.	Yes
Detailed Description	Used to specify the additional information about the discount charge pricing rule type.	No

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Field Name	Field Description	Mandatory (Yes or No)
Pricing Rule Business Object	Used to indicate the business object using which you want to create the discount charge pricing rule type. The valid value is: • Discount Charge Pricing Rule	Yes
Business Object	Indicates the business object using which you are defining the discount charge pricing rule type.	Not applicable
Status	Used to indicate the status of discount charge pricing rule type. The valid values are: • Active • Inactive	Yes
Primary	Used to select whether the discount charge pricing rule type is a primary pricing rule type. **Note:** You must not select the **Primary** option while editing the discount charge pricing rule type.	No
Pricing Rule Type Category	Indicates the pricing rule type category for a discount charge pricing rule type. The valid value is: • Discount Charge	No
Pricing Rule Type Sub Category	Used to indicate the pricing rule type sub category for the discount charge pricing rule type. The valid values are: • Per Member • Per Subscriber **Note:** You must select the **Per Subscriber** option while defining the discount charge pricing rule type.	No

Tip: Alternatively, you can edit the details of a discount charge pricing rule type by clicking the **Edit** button in the **Pricing Rule Type** zone.

5. Modify the details in the **Main** section.
6. Associate the required algorithms in a discount charge pricing rule type.
7. Add, edit, or remove the required price items in a discount charge pricing rule type.
8. Add, edit, or remove the price item parameters in a discount charge pricing rule type, if required.
9. Add, edit, or remove characteristics for a discount charge pricing rule type, if required.
10. Add, edit, or remove the configuration details of the audit in a discount charge pricing rule type.
11. Click **Save**.
    The changes made to the discount charge pricing rule type are saved.

Related Topics

For more information on...	See...
How to associate algorithms with a discount charge pricing rule type	Associating an Algorithm with a Discount Charge Pricing Rule Type on page 3451

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For more information on...	See...
How to add price items in a discount charge pricing rule type	Adding a Price Item in a Discount Charge Pricing Rule Type on page 3452
How to add price item parameters in a discount charge pricing rule type	Adding a Price Item Parameter in a Discount Charge Pricing Rule Type on page 3455
How to define a characteristic for a discount charge pricing rule type	Defining a Characteristic for a Discount Charge Pricing Rule Type on page 3455
How to add elements for audit in a discount charge pricing rule type	Adding Elements for Audit in a Discount Charge Pricing Rule Type on page 3456

Deleting a Discount Charge Pricing Rule Type

Procedure

To delete a discount charge pricing rule type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **P** and then click **Pricing Rule Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Pricing Rule Type** sub-menu.
   The **Pricing Rule Type** screen appears.
4. In the **Pricing Rule Type List** zone, click the **Delete** (🗑) icon in the **Delete** column corresponding to the discount charge pricing rule type that you want to delete.
   A message appears confirming whether you want to delete the discount charge pricing rule type.

   Note: You can delete a discount charge pricing rule type when it is not yet used in the system.

   Tip: Alternatively, you can delete a discount charge pricing rule type by clicking the **Delete** button in the **Pricing Rule Type** zone.
5. Click **OK**.
   The discount charge pricing rule type is deleted.

Related Topics

For more information on...	See...
Pricing Rule Type screen	Pricing Rule Type on page 2942
Pricing Rule Type List zone	Pricing Rule Type List on page 2943
Pricing Rule Type zone	Pricing Rule Type on page 2946

Viewing the Discount Charge Pricing Rule Type Details

Procedure

To view the details of a discount charge pricing rule type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.

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2. From the **Admin** menu, select **P** and then click **Pricing Rule Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Pricing Rule Type** sub-menu.
   The **Pricing Rule Type** screen appears.
4. In the **Pricing Rule Type List** zone, click the **Broadcast** (📡) icon corresponding to the discount charge pricing rule type whose details you want to view.
   The **Pricing Rule Type** zone appears.
5. View the details of the a discount charge pricing rule type in the **Pricing Rule Type** zone.

Related Topics

For more information on...	See...
Pricing Rule Type screen	Pricing Rule Type on page 2942
Pricing Rule Type List zone	Pricing Rule Type List on page 2943
Pricing Rule Type zone	Pricing Rule Type on page 2946

Viewing the Discount Charge Pricing Rule Details

Procedure

To view the details of a discount charge pricing rule:

1. Do either of the following:

If you want to...	Then...
View the discount charge pricing rule for a Fully-Insured Individual Membership	**a.** Search for the fully-insured individual membership in the **Customer 360° View** screen. **b.** In the **Search Results** section, click the **View** (🔗) icon corresponding to the fully-insured individual whose pricing rule details you want *t*o view. The **Policy** tab appears in the **Customer 360° Information** screen.
View the discount charge pricing rule for a Fully-Insured Group Membership	**a.** Search for the fully-insured group and individual memberships in the **Customer 360° View** screen. **b.** In the **Search Results** section, click the **View** (🔗) icon corresponding to the fully-insured group membership whose pricing rule details you want *t*o view. The **Policy** tab appears in the **Customer 360° Information** screen.

2. Click the **Pricing Information** tab.
   The **Pricing Information** tab appears.
3. In the **Fully-Insured Pricing Rules** zone, click the link in the **Pricing Rule Information** column corresponding to the fully-insured pricing rule type whose details you want to view.
   The **Pricing Rule (Discount Charge)** screen appears. It contains the following zone:
   - **Discount Charge Pricing Rule** - Displays the discount charge pricing rule details for an individual membership. It contains the following sections:
     - **Pricing Information** - Displays the basic details about the discount charge pricing rule.
     - **Pricing Parameters** - Displays the pricing parameters defined for the discount charge pricing rule.
     - **Characteristics** - Displays the characteristics defined for the discount charge pricing rule.
4. View the basic details of the discount charge pricing rule in the **Pricing Information** section.
5. View the pricing parameters defined for the discount charge pricing rule in the **Pricing Parameters** section.

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6. View the characteristics of the discount charge pricing rule in the **Characteristics** section.

Related Topics

For more information on...	See...
Customer 360° View screen	Customer 360° View on page 589
Person tab	Customer 360° Information - Person on page 609
Pricing Information tab	Customer 360° Information - Pricing Information on page 641
Fully-Insured Pricing Rules zone	Fully-Insured Pricing Rules on page 654
Discount Charge Pricing Rule zone	Discount Charge Pricing Rule on page 722

Pricing Rule Inactivation

Earlier, you were not able to inactivate a pricing rule which is referred by a group or individual membership for the charge calculation. Now, the system enables you to change the status of the age based, tier based, additional fee, and discount charge pricing rules from **Active** to **Inactive** even when it is referred by a membership for the charge calculation. On inactivating a pricing rule, the system creates an audit event in the system.

A new batch named **Process Inactivated Fully-Insured Pricing Rule (C1-CBIPR)** is introduced in this release. You must execute the **Process Inactivated Fully-Insured Pricing Rule (C1-CBIPR)** batch in between the following batches - **Audit Event Process Monitor (C1-AUDEV)** and **Identify Entities for Repricing (C1-REPC1)**. The **Process Inactivated Fully-Insured Pricing Rule (C1-CBIPR)** batch considers the repricing entity details records from the **CI_REPRC_ENTITY_DTL** table which are in the **Discard** status due to pricing rule inactivation. It then cancels the billable charges and bill segments (if any) which are created using the pricing rule which you have inactivated. In addition, it changes the status of the records in the **CI_PRCE_CALC** table to **I** where the inactivated pricing rule is referred.

If you inactivate a primary pricing rule, the system will cancel the billable charges and bill segments (if any) which are created using the related pricing rules. If you inactivate a rate guarantee pricing rule, the system will cancel the billable charges and bill segments (if any) which are created using the rate guarantee pricing rule.

Chapter 40

Fully-Insured Billing

Topics:

- Audit Framework for Fully-Insured Billing
- Premium Proration Rules
- Age Monitoring
- State of Issue
- Membership Premium Calculation
- Bill Group Derivation for Membership
- Account and Price Item Derivation for Membership
- Tightly Coupled Bill Cycle and Bill Period through Billing Preference
- Bill Period Timeline
- 9/10 Billing (Skip Months)
- Repricing
- Fully-Insured Billable Charge Creation
- New Born Credit Waiver
- Membership Benefit Billing
- Additional Repricing Entity Detail Records
- Rounding Premium at the Member Level
- Support Open Ended Policies, Plans, Pricing Rules, and Memberships
- Hold Repricing
- Prorate Membership Benefit and Corresponding Sponsor Charges
- Zero-Amount Membership Benefit Charges
- Benefit Passthrough Charges vs. Calculated Charges
- Repricing Request

This chapter explains how the billing is done for fully-insured business in Oracle Revenue Management and Billing. It contains the following topics:

- Audit Framework for Fully-Insured Billing
- Premium Proration Rules
- Age Monitoring
- State of Issue
- Membership Premium Calculation
- Bill Group Derivation for Membership
- Account and Price Item Derivation for Membership
- Tightly Coupled Bill Cycle and Bill Period through Billing Preference
- Bill Period Timeline
- 9/10 Billing (Skip Months)
- Repricing
- Fully-Insured Billable Charge Creation
- New Born Credit Waiver
- Membership Benefit Billing
- Additional Repricing Entity Detail Records
- Rounding Premium at the Member Level
- Support Open Ended Policies, Plans, Pricing Rules, and Memberships
- Hold Repricing
- Prorate Membership Benefit and Corresponding Sponsor Charges
- Zero-Amount Membership Benefit Charges
- Benefit Passthrough Charges vs. Calculated Charges
- Repricing Request
- Membership Repricing through Inbound Web Service
- Pricing Vs Passthrough Charges
- Billable Charge Creation or Cancellation through File Upload Interface
- Trigger Repricing on Deleting Derivation and Pricing Parameters of a Bill Group
- Health Check
- Split Dependent Person Coverage
- Automatic Hold Request Creation Via File Upload Interface
- Hold Request Preference
- Billing Preference

Related Topics

- Membership Premium Calculation Through Inbound Web Service
- Pricing Vs Passthrough Charges
- Billable Charge Creation or Cancellation through File Upload Interface
- Trigger Repricing on Deleting Derivation and Pricing Parameters of a Bill Group
- Health Check
- Split Dependent Person Coverage
- Automatic Hold Request Creation Via File Upload Interface
- Consider Zero or Negative Bills for Paid Through Date
- Display Non-Eligible Members' Premium Calculation Lines
- Billing Preference
- Hold Request Preference

For more information on...	See...
Audit Framework for Fully-Insured Billing	Audit Framework for Fully-Insured Billing on page 3466
Premium Proration Rules	Premium Proration Rules on page 3480
Age Monitoring	Age Monitoring on page 3481
State of Issue	State of Issue on page 3483
Membership Premium Calculation	Membership Premium Calculation on page 3484
Bill Group Derivation for Membership	Bill Group Derivation for Membership on page 3489
Account and Price Item Derivation for Membership	Account and Price Item Derivation for Membership on page 3491
Tightly Coupled Bill Cycle and Bill Period through Billing Preference	Tightly Coupled Bill Cycle and Bill Period through Billing Preference on page 3492
Bill Period Timeline	Bill Period Timeline on page 3493
9/10 Billing (Skip Months)	9/10 Billing (Skip Months) on page 3494
Repricing	Repricing on page 3495
Fully-Insured Billable Charge Creation	Fully-Insured Billable Charge Creation on page 3496
New Born Credit Waiver	New Born Credit Waiver on page 3498
Membership Benefit Billing	Membership Benefit Billing on page 3499
Additional Repricing Entity Detail Records	Additional Repricing Entity Detail Records on page 3500
Rounding Premium at the Member Level	Rounding Premium at the Member Level on page 3501
Support Open Ended Policies, Plans, Pricing Rules, and Memberships	Support Open Ended Policies, Plans, Pricing Rules, and Memberships on page 3501
Hold Repricing	Hold Repricing on page 3502
Prorate Membership Benefit and Corresponding Sponsor Charges	Prorate Membership Benefit and Corresponding Sponsor Charges on page 3503

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For more information on...	See...
Zero-Amount Membership Benefit Charges	Zero-Amount Membership Benefit Charges on page 3504
Benefit Passthrough Charges vs. Calculated Charges	Benefit Passthrough Charges vs. Calculated Charges on page 3506
Repricing Request	Repricing Request on page 3507
Membership Repricing through Inbound Web Service	Membership Premium Calculation Through Inbound Web Service on page 3514
Pricing Vs Passthrough Charges	Pricing Vs Passthrough Charges on page 3588
Billable Charge Creation or Cancellation through File Upload Interface	Billable Charge Creation or Cancellation through File Upload Interface on page 3591
Trigger Repricing on Deleting Derivation and Pricing Parameters of a Bill Group	Trigger Repricing on Deleting Derivation and Pricing Parameters of a Bill Group on page 3592
Health Check	Health Check on page 3593
Split Dependent Person Coverage	Split Dependent Person Coverage on page 3613
Automatic Hold Request Creation Via File Upload Interface	Automatic Hold Request Creation Via File Upload Interface on page 3614
Hold Request Preference	Hold Request Preference on page 2709
Billing Preference	Billing Preference on page 3615
Consider Zero or Negative Bills for Paid Through Date	Consider Zero or Negative Bills for Paid Through Date on page 3614
Display Non-Eligible Members' Premium Calculation Lines	Display Non-Eligible Members' Premium Calculation Lines on page 3615

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Audit Framework for Fully-Insured Billing

Oracle Revenue Management and Billing calculates the membership premium when you add a membership to a policy plan. It also enables you to recalculate the membership premium in the following scenarios:

- A member person is added or removed from the membership.
- The fields, characteristics, or statuses which are monitored for the auditing purposes are updated at the membership, member person, or pricing rule level.
- A pricing rule is added or updated for the policy plan.
- The derivation and pricing parameters are defined or updated for a bill group.

The membership premium calculation and recalculation (i.e. repricing) is implemented using the **Entity Audit** feature. The entity audit framework is already configured for the following business objects:

- C1-Membership
- C1_PERSON_BO
- C1-PricingRuleTierBased
- C1-PricingRuleAgeBased
- C1-BillLevel

To configure the entity audit framework for the above listed business objects, the following changes are made to these business objects:

- The **Eligible for Audit Event** option type is set to **Y** in
- An algorithm created using the **C1-REAUDEVNT** algorithm type is already attached to the **Audit** system event of the **C1-PricingRuleTierBased**, **C1-PricingRuleAgeBased**, and **C1-BillLevel** business objects.
- An algorithm created using the **C1-FIAUDEV** algorithm type is already attached to the **Audit** system event of the **C1-Membership** and **C1_PERSON_BO** business objects.

But, the entity audit framework will work when you define an active audit event type for the above listed business objects. For more information on how to create an audit event type, see Defining an Audit Event Type on page 3768. While creating an audit event type for the **C1-PricingRuleTierBased** and **C1-PricingRuleAgeBased** business objects, you need to attach an algorithm created using the **C1-AUDEVMPR** algorithm type to the **Audit Event Processing** system event of the respective audit event type. And, while creating an audit event type for the **C1-BillLevel** business object, you need to attach an algorithm created using the **C1-AUDBILLVL** algorithm type to the **Audit Event Processing** system event of the audit event type.

In addition, you need to list the following in the pricing rule types where the category is set to **Age Based** and **Tier Based**:

- Audit event types of the **C1-Membership** and **C1_PERSON_BO** business objects using which the audit event should be created whenever a membership and member person is added, updated, or removed from the policy plan, respectively.
- Elements of the **C1-Membership** and **C1_PERSON_BO** business objects for which auditing is required.

Note:

At present, you cannot use an audit event type of the **C1-Membership** and **C1_PERSON_BO** business objects in the **Age Based** and **Tier Based** pricing rule types when the **Update All** option is selected in the audit event type. Therefore, we recommend you to select an audit event type of the **C1-Membership** and **C1_PERSON_BO** business objects where the **Update All** option is not selected.

The system creates an audit event whenever the membership start and end dates and member person's start and end dates are changed in the system irrespective of whether these fields are listed for auditing or not in the age based or tier based pricing rule types.

You can also configure the entity audit feature for any custom membership or person business objects.

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The way in which the audit events are created and processed for a pricing rule, membership, and member person is different. While creating an audit event, the system checks whether an audit event for the entity with the same effective date already exists in the **Pending** status. If so, the system does not create a new audit event for the entity. Instead, the system adds a log in the existing audit event.

Related Topics

For more information on...	See...
How the audit events are created and processed for an age based or tier based pricing rule	Age Based and Tier Based Pricing Rules Audit Process on page 3467
How the audit events are created and processed for a membership	Membership Audit Process on page 3468
How the audit events are created and processed for a person	Person Audit Process on page 3472
How the audit events are created and processed for the derivation and pricing parameters of a bill group	Bill Group Derivation and Pricing Parameters Audit Process on page 3476

Age Based and Tier Based Pricing Rules Audit Process

If you add or edit an age based or tier based pricing rule, the system checks whether an active audit event type exists for the **C1-PricingRuleAgeBased** or **C1-PricingRuleTierBased** business object, respectively. If an active audit event type exists for the business object, the system creates an audit event for the pricing rule using the audit event type. The audit event is created in the **Pending** status. Note that the system creates one audit event for the pricing rule irrespective of the number of changes made to the pricing rule. In addition, an effective date is stamped corresponding to the audit event which later helps in deriving the timeline during premium calculation. Note that the effective date is set to the pricing rule's start date.

On executing the **Audit Event Process Monitor (C1-AUDEV)** batch, the system considers the audit events in the **Pending** or **Error** status. By default, it considers the audit events in the **Pending** status. The system checks whether the **C1-AUDEVMPR** algorithm is attached to the respective audit event type. If the **C1-AUDEVMPR** algorithm is attached to the audit event type, it identifies the policy plan where the pricing rule is defined. Once the policy plan is identified, it extracts a list of membership defined on the policy plan and the pricing rule type using which the pricing rule is created. Then, the system creates a repricing entity detail record for each membership, pricing rule type, and effective date combination in the **CI_REPRC_ENTITY_DTL** table. The status of the repricing entity detail record is set to **P**.

Let us understand this with the help of an example.

The following table illustrates the audit events that are created while adding the PR1 and PR2 pricing rules:

Audit Event	AE1	AE2
Pricing Rule	PR1	PR2
Pricing Rule Type Using which the Pricing Rule is Created	PRT1	PRT3
Pricing Rule Start Date	01-01-2019	01-01-2019
Policy Plan for which the Pricing Rule is Defined	PP1	PP2
Pricing Rule Types Associated with the Policy Plan	PRT1, PRT2, PRT3	PRT3
Memberships which Belong to the Policy Plan	M1, M2, M3, and M4	M11 and M12

For the AE1 audit event, the system creates four repricing entity detail records with the following combinations in the **CI_REPRC_ENTITY_DTL** table:

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- M1, PRT1, 01-01-2019
- M2, PRT1, 01-01-2019
- M3, PRT1, 01-01-2019
- M4, PRT1, 01-01-2019

And, for the AE2 audit event, the system creates two repricing entity detail records with the following combinations in the **CI_REPRC_ENTITY_DTL** table:

- M11, PRT3, 01-01-2019
- M12, PRT3, 01-01-2019

Once the repricing entity detail records are created successfully, the status of the audit event is set to **Complete**. However, if an error occurs while creating the repricing entity detail records for an audit event, the status of the audit event is set to **Error**.

Membership Audit Process

If you add or edit a membership, the system checks whether an active audit event type exists for the **C1-Membership** business object. If an active audit event type exists for the business object, the creates the audit event using the audit event type. The system creates the audit event whenever a membership is added to a policy plan and dependent member person is added to a membership. It also creates the audit event whenever the membership and member person details are updated. However, note that the audit events are created in the update scenario when the element listed for auditing in the age based or tier based pricing rule types is updated. The system considers only those pricing rule types whose pricing rules are effective during the respective entity (i.e. membership or member person whichever is updated) date range.

The audit event is created in the **Pending** status. An effective date is stamped corresponding to the audit event which later helps in deriving the timeline during premium calculation. Note that the system creates distinct audit events in the following scenarios:

Scenario	**System Behavior**
A membership is added to a policy plan	One audit event is created for the membership. Here, the effective date in the audit event is set to the membership's start date. For example, two memberships named M1 (with the start date as 01-01-2020) and M2 (with the start date as 01-15-2020) are added to a policy plan named PP1. In such case, the system will create two audit events - one for M1 with the effective date as 01-01-2020 and another for M2 with the effective date as 01-15-2020.
A dependent member person is added to a membership	One audit event is created for the membership. Here, the effective date in the audit event is set to the dependent member person's start date. For example, one dependent member person named MP1 (with the start date as 06-05-2020) is added to the M1 membership and another dependent member person named MP2 (with the start date as 06-10-2020) is added to the M2 membership. In such case, the system will create two audit events - one for M1 with the effective date as 06-05-2020 and another for M2 with the effective date as 06-10-2020.
A dependent member person is removed from a membership	One audit event is created for the membership. Here, the effective date in the audit event is set to the dependent member person's start date. For example, one dependent member person named MP4 (with the start date as 9-15-2020) is removed from the M1 membership. In such case, the system will create one audit event for M1 with the effective date as 9-15-2020.

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<table>
<tr><th>Scenario</th><th>System Behavior</th></tr>
<tr><td>A membership is added to a policy plan along with a dependent member person</td><td>Multiple audit events are created for the membership - one where the effective date is set to membership's start date, another where the effective date is set to dependent member person's start date, and third where the effective date is set to dependent member person's end date +1 Day. Note that the second audit event is created when the dependent member person's start date is later than membership's start date. And, the third audit event is created when the dependent member person's end date is earlier than membership's end date.

For example, one membership named M1 (with the start date as 01-01-2020 and end date as 12-31-2020) is added with two member persons - MP1 who is a main subscriber and MP2 (with the start date as 03-01-2020 and end date as 10-31-2020) who is a dependent member person. In such case, the system will create three audit events for M1 - one with the effective date as 01-01-2020, another with the effective date as 03-01-2020, and third with the effective date as 11-01-2020 (i.e. 10-31-2020 + 1 Day).</td></tr>
<tr><td>Membership characteristics are added or updated in the system</td><td>Multiple audit events are created for the membership - one for each set of membership characteristics with the same effective date. Here, the effective date in the audit event is set to the date from when the membership's characteristic is effective.

For example, the following characteristics are added or updated for the M1 membership:

<table><tr><th>Characteristic</th><th>Effective Date</th><th>Action</th></tr><tr><td>Maximum Number of Dependents</td><td>9-15-2020</td><td>Add</td></tr><tr><td>Age Calculation Date Basis</td><td>9-20-2020</td><td>Edit</td></tr><tr><td>Young Adult Max Age Limit</td><td>9-15-2020</td><td>Add</td></tr><tr><td>Young Adult Inclusion Applicability</td><td>9-20-2020</td><td>Edit</td></tr></table>
In such case, the system will create two audit events for M1 - one with the effective date as 9-15-2020 and another with the effective date as 9-20-2020.</td></tr>
<tr><td>Member person characteristics are added or updated in the system</td><td>Multiple audit events are created for the membership - one for each set of member person's characteristics with the same effective date. Here, the effective date in the audit event is set to the date from when the member person's characteristic is effective.

For example, the following characteristics are added or updated for the member persons in the M1 membership:

<table><tr><th>Member Person</th><th>Characteristic</th><th>Effective Date</th><th>Action</th></tr><tr><td>MP1</td><td>Maximum Number of Dependents</td><td>9-15-2020</td><td>Add</td></tr><tr><td>MP1</td><td>Age Calculation Date Basis</td><td>9-20-2020</td><td>Edit</td></tr></table></td></tr>
</table>

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<table>
<tr><th>Scenario</th><th>System Behavior</th></tr>
<tr><td></td><td>
<table>
<tr><th>Member Person</th><th>Characteristic</th><th>Effective Date</th><th>Action</th></tr>
<tr><td>MP2</td><td>Young Adult Max Age Limit</td><td>9-15-2020</td><td>Add</td></tr>
<tr><td>MP2</td><td>Young Adult Inclusion Applicability</td><td>9-20-2020</td><td>Edit</td></tr>
</table>

In such case, the system will create two audit events for M1 - one with the effective date as 9-15-2020 and another with the effective date as 9-20-2020.
</td></tr>
<tr><td>A set of membership fields except membership start and end dates is updated in the system</td><td>One audit event is created for the membership. Here, the effective date in the audit event is set to the membership's start date.

For example, the external membership ID of the M1 membership (with the start date as 9-15-2020) is changed. In such case, the system will create one audit event for M1 with the effective date as 9-15-2020.</td></tr>
<tr><td>The membership start date is updated in the system</td><td>One audit event is created for the membership. Here, the effective date in the audit event is set to the membership's new start date.

For example, the start date of the M1 membership is changed from 9-15-2020 to 9-20-2020. In such case, the system will create one audit event for M1 with the effective date as 9-20-2020.</td></tr>
<tr><td>The membership end date is updated in the system</td><td>One audit event is created for the membership. Here, the effective date in the audit event is set to membership's new end date.

For example, the end date of the M1 membership is changed from 12-31-2020 to 11-30-2020. In such case, the system will create one audit event for M1 with the effective date as 11-30-2020.</td></tr>
<tr><td>A set of member person's fields except member person start and end dates is updated in the system</td><td>One audit event is created for the membership. Here, the effective date in the audit event is set to the member person's start date.

For example, the relationship type and status of the MP1 member person (with the start date as 01-01-2020) in the M1 membership is changed. In such case, the system will create one audit event for M1 with the effective date as 01-01-2020.</td></tr>
<tr><td>The dependent member person's start date is updated in the system</td><td>Three audit events are created for the membership - one where the effective date is set to the dependent member person's previous start date, another where the effective date is set to the dependent member person's new start date, and third where the effective date is set to dependent member person's end date + 1 Day. However, if the derived effective date is later than the membership end date, the system does not create the third audit event for the membership. In such scenario, it simply creates first two audit events.

For example, the Mike's effective date range is changed from 04-01-2019 - 09-30-2019 to 01-15-2019 - 09-30-2019 in the M1 membership which is effective from 01-01-2019 to 12-31-2019. In such case, the system will create three audit events for M1 - one with effective date as 04-01-2019, another with effective date as 01-15-2019, and third with effective date as 10-01-2019 (i.e. 09-30-2019 + 1 Day).

In addition, if there is a characteristic for the person whose effective date falls with the new enrollment date range, the system creates an audit event for the person where the effective date is set to characteristic's effective date. Note that</td></tr>
</table>

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Scenario	System Behavior
	the system considers those effective characteristics where the characteristic entity is set to **Person**. Let us assume that in the above example a characteristic for Mike was effective from 02-01-2019. In such case, the system creates three audit events for the M1 membership (with the effective dates as mentioned above) and one audit event for the person (i.e. Mike) where the effective date is set to 02-01-2019.
The dependent member person's end date is updated in the system	Two audit events are created for the membership - one where the effective date is set to dependent member person's previous end date + 1 Day and another where the effective date is set to dependent member person's new end date + 1 Day. However, if the derived effective date is later than the membership end date, the system does not create the second audit event for the membership. In such scenario, it simply creates the first audit event. For example, the Garry's effective date range is changed from 04-01-2019 - 09-30-2019 to 04-01-2019 - 12-31-2019 in the M1 membership which is effective from 01-01-2019 to 12-31-2019. In such case, the system will create one audit event for M1 with the effective date as 10-01-2019 (i.e. 09-30-2019 + 1 Day). It will not create another audit event for M1 because the derived effective date (i.e. 12-31-2019 + 1 Day = 01-01-2020) is later than membership end date (i.e. 12-31-2019). In addition, if there is a characteristic for the person whose effective date falls with the new enrollment date range, the system creates an audit event for the person where the effective date is set to characteristic's effective date. Note that the system considers those effective characteristics where the characteristic entity is set to **Person**. Let us assume that in the above example a characteristic for Garry was effective from 11-01-2019. In such case, the system creates one audit event for M1 membership (with the effective date as mentioned above) and another audit event for the person (i.e. Garry) where the effective date is set to 11-01-2019.
The dependent member person's start and end dates are updated in the system	Four audit events are created for the membership - one where the effective date is set to the dependent member person's previous start date, another where the effective date is set to the dependent member person's new start date, third where the effective date is set to dependent member person's previous end date + 1 Day, and fourth where the effective date is set to dependent member person's new end date + 1 Day. However, if the derived effective date is later than the membership end date, the system does not create the fourth audit event for the membership. In such scenario, it simply creates the first three audit events. For example, the Juliet's effective date range is changed from 04-01-2019 - 09-30-2019 to 01-01-2019 - 11-30-2019 in the M1 membership which is effective from 01-01-2019 to 12-31-2019. In such case, the system will create four audit events for M1 - one with effective date as 04-01-2019, another with effective date as 01-01-2019, third with effective date as 10-01-2019 (i.e. 09-30-2019 + 1 Day), and fourth with effective date as 12-01-2019 (i.e. 11-30-2019 + 1 Day). In addition, if there is a characteristic for the person whose effective date falls with the new enrollment date range, the system creates an audit event for the person where the effective date is set to characteristic's effective date. Note that the system considers those effective characteristics where the characteristic entity is set to **Person**. Let us assume that in the above example two characteristics of Juliet were effective from 03-01-2019 and 10-01-2019, respectively. In such case, the system creates four audit events

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Scenario	System Behavior
	for M1 membership (with the effective dates as mentioned above), fifth audit event for the person (i.e. Juliet) where the effective date is set to 03-01-2019, and sixth audit event for the person (i.e. Juliet) where the effective date is set to 10-01-2019.

For each audit event, the system identifies the policy plan to which the membership belongs and the active pricing rules defined on the policy plan. It then identifies the pricing rule types using which these active pricing rules are created in the system. A repricing entity detail record is created for each membership, pricing rule type, and effective date combination in the **CI_REPRC_ENTITY_DTL** table. The status of the repricing entity detail record is set to **P**.

Let us understand this with the help of an example.

The following table illustrates the audit events that are created while adding the M1 and M2 memberships:

Entity	**Entity Detail**	
Audit Event	AE11	AE12
Membership	M1	M2
Membership Start Date	01-03-2019	01-02-2019
Policy Plan to which Membership Belongs	PP11	PP12
Pricing Rules Defined on the Policy Plan	PR1 (Using PRT1), PR2 (Using PRT2), PR3 (Using PRT3)	PR11 (Using PRT1), PR13 (Using PRT2)
Pricing Rule Types Associated with the Policy Plan	PRT1, PRT2, PRT3	PRT1, PRT2

For the AE11 audit event, the system creates three repricing entity detail records with the following combinations in the **CI_REPRC_ENTITY_DTL** table:

- M1, PRT1, 01-03-2019
- M1, PRT2, 01-03-2019
- M1, PRT3, 01-03-2019

And, for the AE12 audit event, the system creates two repricing entity detail records with the following combinations in the **CI_REPRC_ENTITY_DTL** table:

- M2, PRT1, 01-02-2019
- M2, PRT2, 01-02-2019

Note: If the audit event's effective date is earlier than the member person's start date, the system sets the effective date in the repricing entity detail record to the member person's start date. Therefore, in such scenarios, the effective date of the audit event and repricing entity detail records will be different.

Once the repricing entity detail records are created successfully, the status of the audit event is set to **Complete**. However, if an error occurs while creating the repricing entity detail records for an audit event, the status of the audit event is set to **Error**.

Person Audit Process

If you add or edit a person, the system checks whether an active audit event type exists for the **C1_PERSON_BO** business object. If an active audit event type exists for the business object, the system creates an audit event for the person using the audit event type. The audit event is created in the **Pending** status. An effective date is stamped corresponding

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to the audit event which later helps in deriving the timeline during premium calculation. Note that the system creates distinct audit events in the following scenarios:

<table>
<tr><th>Scenario</th><th>System Behavior</th></tr>
<tr><td>Person fields are updated in the system.</td><td>One audit event is created for the person. Here, the effective date in the audit event is set to the member person's start date.

For example, the following person identifier type is defined for MP1, MP2, and MP3 who are members of the M1 membership:

<table>
<tr><th>Member Person</th><th>Member Person Start Date</th><th>Person Identifier Type</th><th>Person Identifier</th></tr>
<tr><td>MP1</td><td>03-10-2020</td><td>Social Security Number</td><td>987-65-4320</td></tr>
<tr><td>MP2</td><td>03-15-2020</td><td>Social Security Number</td><td>987-65-4321</td></tr>
<tr><td>MP3</td><td>03-25-2020</td><td>Social Security Number</td><td>987-65-4322</td></tr>
</table>

In such case, the system will create three audit events - one for MP1 with the effective date as 03-10-2020, another for MP2 with the effective date as 03-15-2020, and third for MP3 with the effective date as 03-25-2020.</td></tr>
<tr><td>Person characteristics are added or updated in the system.</td><td>Multiple audit events are created for the person - one for each set of person characteristics with the same effective date. Here, the effective date in the audit event is set to the date from when the person's characteristic is effective.

For example, the following characteristics are added or updated for the persons who are members of the M1 membership:

<table>
<tr><th>Member Person</th><th>Characteristic</th><th>Effective Date</th><th>Action</th></tr>
<tr><td>MP1</td><td>Marital Status</td><td>09-15-2020</td><td>Add</td></tr>
<tr><td>MP1</td><td>Garble Data</td><td>09-20-2020</td><td>Edit</td></tr>
<tr><td>MP2</td><td>Marital Status</td><td>09-15-2020</td><td>Add</td></tr>
<tr><td>MP2</td><td>Garble Data</td><td>09-20-2020</td><td>Edit</td></tr>
</table>

In such case, the system will create four audit events - one for MP1 with the effective date as 09-15-2020, another for MP1 with the effective date as 09-20-2020, third for MP2 with the effective date as 09-15-2020, and fourth for MP2 with the effective date as 09-20-2020.</td></tr>
</table>

For each audit event, the system identifies the memberships in which the person is added as a member person. It identifies the policy plan to which each membership belongs and the active pricing rules defined on the policy plan. It then identifies the pricing rule types using which these active pricing rules are created in the system. A repricing entity detail record is created for each membership, pricing rule type, and effective date combination in the **CI_REPRC_ENTITY_DTL** table. The status of the repricing entity detail record is set to **P**.

Let us understand this with the help of an example.

The following table illustrates the audit event that is created while updating the MP1 person:

Audit Event	AE1

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Membership to which MP1 belongs	M1	M2	M3
Member Person's Start Date	01-01-2019	01-01-2019	01-07-2019
Policy Plan to which Membership Belongs	PP1	PP2	PP3
Pricing Rules Defined on the Policy Plan	PR1 (Using PRT1), PR2 (Using PRT2)	PR3 (Using PRT3), PR4 (Using PRT3)	PR5 (Using PRT5), PR6 (Using PRT6)
Pricing Rule Types Associated with the Policy Plan	PRT1, PRT2	PRT3, PRT4	PRT5, PRT6

For the AE1 audit event, the system creates five repricing entity detail records with the following combinations in the **CI_REPRC_ENTITY_DTL** table:

- M1, PRT1, 01-01-2019
- M1, PRT2, 01-01-2019
- M2, PRT3, 01-01-2019
- M3, PRT5, 01-07-2019
- M3, PRT6, 01-07-2019

Note: If the audit event's effective date is earlier than the member person's start date, the system sets the effective date in the repricing entity detail record to the member person's start date. Therefore, in such scenarios, the effective date of the audit event and repricing entity detail records will be different.

Once the repricing entity detail records are created successfully, the status of the audit event is set to **Complete**. However, if an error occurs while creating the repricing entity detail records for an audit event, the status of the audit event is set to **Error**.

Membership Benefit Audit Process

Oracle Revenue Management and Billing enables you to calculate the charges for the availed Medicare Part D LIS, Medicare Part D LEP, or APTC benefit for the group or individual membership. The benefit charges are calculated and recalculated (whenever the benefit end date, amount, or status changes) using the **Entity Audit** framework. The entity audit framework is already configured for the **C1-Benefits** business object by:

- Setting the **Eligible for Audit Event** option type to **Y**
- Attaching the **C1-FIAUDEV** algorithm to the **Audit** system event

You need to create an active audit event type for the **Benefits** business object. While creating an active audit event type for the **Benefits** business object, you need to ensure the following:

- Set the status of the audit event type to **Active**
- Set the entity business object of the audit event type to **Benefit**
- Set the audit usage of the audit event type to **Premium Calculation**
- Ensure that the **Update All** option is not selected and the **Add Action** and **Delete Action** options are selected
- Add the fields (such as, benefitAmount and endDate) of the **C1-Benefits** business object for which you want to enable the audit process
- Add the statuses (such as, **ACTIVE**, **INACTIVE**, and **DISCARD**) of the **C1-Benefits** business object for which you want to enable the audit process

While creating or editing a membership benefit from the user interface, through a health care inbound message, or through the membership repricing inbound web service, the system derives the policy or health plan of the group or individual membership for which the benefit is created or updated. It then checks whether a benefit pricing rule type is

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associated with the policy or health plan. If so, the system refers the benefit pricing rule type associated with the policy or health plan. If the listed elements (such as benefit end date, benefit amount) are updated or when the status of the membership benefit is set to **ACTIVE** (during creation), **INACTIVE** (during modification), or **DISCARD** (when it is discontinued), the system creates an audit event for the membership benefit using the audit event type given in the benefit pricing rule type. Note that the system considers only the active audit event type given in the benefit pricing rule type.

The audit event is created in the **Pending** status. Note that the system creates one audit event for a membership benefit irrespective of the number of changes made to the membership benefit. In addition, an effective date is stamped corresponding to the audit event which later helps in deriving the timeline. Note that the effective date is set to the membership benefit's start date.

The system then creates a repricing entity detail record for each group or individual membership, pricing rule type, and effective date combination in the **CI_REPRC_ENTITY_DTL** table. The status of the repricing entity detail record is set to **P**.

For example, an audit event is created while adding the following group and individual membership benefits:

Audit Event	AE1	AE2
Membership	GRPMEM	INDMEM
Membership Start Date	01-Jan-2024	01-Jan-2024
Membership Benefit	Medicare Part D LIS	APTC
Policy Plan to which Membership Belongs	PP1	-
Health Plan to which Membership Belongs	-	HP1
Pricing Rules Defined on the Policy Plan	AGE_BASED_1, ADDITIONAL_FEE_1	-
Pricing Rules Defined on the Health Plan	-	AGE_BASED_1, ADDITIONAL_FEE_1
Pricing Rule Types Associated with the Policy Plan	AGE-BASED_01, ADDITIONAL_FEE_01, BENEFIT_01	-
Pricing Rule Types Associated with the Health Plan	-	AGE-BASED_01, ADDITIONAL_FEE_01, BENEFIT_01

For the AE1 audit event, the system creates three repricing entity detail records with the following combinations in the **CI_REPRC_ENTITY_DTL** table:

- GRPMEM, AGE-BASED_01, 01-Jan-2024
- GRPMEM, ADDITIONAL_FEE_01, 01-Jan-2024
- GRPMEM, BENEFIT_01, 01-Jan-2024

Similarly, for the AE2 audit event, the system creates three repricing entity detail records with the following combinations in the **CI_REPRC_ENTITY_DTL** table:

- INDMEM, AGE-BASED_01, 01-Jan-2024
- INDMEM, ADDITIONAL_FEE_01, 01-Jan-2024
- INDMEM, BENEFIT_01, 01-Jan-2024

Once the repricing entity detail records are created successfully, the status of the audit event is set to **Complete**. However, if an error occurs while creating the repricing entity detail records for an audit event, the status of the audit event is set to **Error**.

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Bill Group Derivation and Pricing Parameters Audit Process

If you add or edit the derivation and pricing parameters for a bill group, the system checks whether an active audit event type exists for the **C1-BillLevel** business object. If an active audit event type exists for the business object, the system creates an audit event for the bill level ID (i.e. bill group and sort ID combination) using the audit event type. The audit event is created in the **Pending** status. Note that the system creates one audit event for a bill group and sort ID combination irrespective of the number of changes made to the bill group and sort ID combination. In addition, an effective date is stamped corresponding to the audit event which later helps in deriving the timeline during premium calculation. Note that the effective date is set to the date from when the derivation and pricing parameters are effective for the bill group and sort ID combination.

For example, a parent customer named PC1 has two bill groups - BG1 and BG2 and the derivation and pricing parameters are edited for the following combinations:

Bill Group	Sort ID	Effective Date	Action
BG1	10	01-01-2019	Edit
BG1	20	07-01-2019	Add
BG2	10	01-01-2019	Edit
BG2	20	05-01-2019	Add

In such case, the system will create four audit events - one for BG1 and 10 combination with the effective date as 01-01-2019, another for BG1 and 20 combination with the effective date as 07-01-2019, third for BG2 and 10 combination with the effective date as 01-01-2019, and fourth for BG2 and 20 combination with the effective date as 05-01-2019.

On executing the **Audit Event Process Monitor (C1-AUDEV)** batch, the system considers the audit events in the **Pending** or **Error** status. By default, it considers the audit events in the **Pending** status. The system checks whether the **C1-AUDBILLVL** algorithm is attached to the respective audit event type. If the **C1-AUDBILLVL** algorithm is attached to the audit event type, it identifies the parent customer of the bill group for whom the derivation and pricing parameters are defined or edited. It then considers all policies of the parent customer and its bill groups and extracts a list of memberships defined on the respective policy plans. It also identifies the active pricing rules on these policy plans and the pricing rule types using which these active pricing rules are created in the system. The system then checks whether the characteristic types specified in the bill group derivation algorithm on each pricing rule type are defined on any extracted list of membership. If so, the system then checks whether the characteristic values match the derivation and pricing parameters of the bill group. If one or more characteristic values do not match the derivation and pricing parameters of the bill group, the system creates a repricing entity detail record for each membership, pricing rule type, and effective date combination in the **CI_REPRC_ENTITY_DTL** table. The status of the repricing entity detail record is set to **P**.

Let us understand this with the help of an example.

The following table illustrates the changes made to the derivation and pricing parameters of various bill groups which belong to the PC1 parent customer:

Bill Group	Sort ID	Effective Date	Derivation and Pricing Parameter	From	To
BG1	10	01-01-2019	Parameter 1	Western	Western
			Parameter 2	Active	Active
			Parameter 3	Grade A	IC01
			Parameter 4	-	-

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Bill Group	Sort ID	Effective Date	Derivation and Pricing Parameter	From	To
			Source System	X	X
BG1	20	01-01-2019	Parameter 1	Western	Western
			Parameter 2	Active	Active
			Parameter 3	Grade B	IC02
			Parameter 4	-	-
			Source System	X	X
BG2	10	01-01-2019	Parameter 1	Western	Western
			Parameter 2	Active	Active
			Parameter 3	IC01	Grade A
			Parameter 4	-	-
			Source System	X	X
BG2	20	01-01-2019	Parameter 1	Western	Western
			Parameter 2	Active	Active
			Parameter 3	IC02	Grade B
			Parameter 4	-	-
			Source System	X	X

In such case, the system creates four audit events - AE1 for BG1 and 10 combination with the effective date as 01-01-2019, AE2 for BG1 and 20 combination with the effective date as 01-01-2019, AE3 for BG2 and 10 combination with the effective date as 01-01-2019, and AE4 for BG2 and 20 combination with the effective date as 01-01-2019.

Now, let us assume that...

- PC1 has two policies - P1 (where no bill group is associated) and P2 (where BG1 is associated)
- BG1 has one policy named P2 (where PC1 is the policy holder)
- P1 has one plan named PP1 and P2 has one plan named PP2
- PP1 has two memberships - M1 and M2,
- PP2 has three memberships - M3, M4, and M5
- PRT1 and PRT2 are associated with PP1
- PRT3 is associated with PP2
- PP1 has two active pricing rules - PR1 (which is created using PRT1) and PR2 (which is created using PRT2)
- PP2 has one active pricing rule - PR3 (which is created using PRT3)

The following table illustrates the characteristics which are defined for the M1, M2, M3, M4, and M5 memberships:

Membership	Effective Date	Characteristic Type	Characteristic Value
M1	03-01-2019	Location	Western
		Employee Status	Active
		Job Code	Grade A
		Source System	X
M2	05-10-2019	Location	Western

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Membership	Effective Date	Characteristic Type	Characteristic Value
		Employee Status	Active
		Job Code	IC01
		Source System	X
M3	05-20-2019	Location	Western
		Employee Status	Active
		Job Code	Grade B
		Source System	X
M4	07-20-2019	Location	Western
		Employee Status	Active
		Job Code	IC02
		Source System	X
M5	08-01-2019	Location	Western
		Employee Status	Active
		Job Code	Grade A
		Source System	X

In such case, the system will create the repricing entity detail records for each audit event in the **CI_REPRC_ENTITY_DTL** table.

The following table illustrates the repricing entity detail records that will be created for the respective audit event:

Audit Event	The system will create the repricing entity detail records with the following combinations...
AE1	• M2, PRT1, 01-01-2019 • M2, PRT2, 01-01-2019
AE2	• M4, PRT3, 01-01-2019
AE3	• M1, PRT1, 01-01-2019 • M1, PRT2, 01-01-2019 • M5, PRT3, 01-01-2019
AE4	• M3, PRT3, 01-01-201

Once the repricing entity detail records are created successfully, the status of the audit event is set to **Complete**. However, if an error occurs while creating the repricing entity detail records for an audit event, the status of the audit event is set to **Error**.

Audit Account's Bill Cycle Rule Characteristic and Trigger Repricing

Oracle Revenue Management and Billing provides the ability to audit an account whenever the billing preference characteristic type (specified in the **Bill Cycle Rule Code** option type of the **C1-ASOBLLNG** feature configuration) is

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defined or updated for the account. Note that the audit process is triggered only when the bill period derived from the billing preference is changed for the account. To enable this feature, you need to do the following:

- Attach the **C1-FIAUDEV** or **C1-REAUDEVNT** algorithm to the **Audit** system event of the **C1-AccountBO** business object.

  Note: If you want to enable this feature for the fully insured individual business, you need to attach the **C1-FIAUDEV** algorithm. However, if you want to enable this feature for the fully insured group business, you need to attach the **C1-REAUDEVNT** algorithm.

- Create an audit event type for the **C1-AccountBO** business object where the following element of the account is audited:

Element Type	Element Name	Element Value
Characteristic	accountCharacteristic/characteristicType	Bill Cycle Rule Code

- Include the audit event type in the required primary pricing rule type.

Note: The audit process is not applicable when you to directly update the bill cycle from the user interface or through an inbound web service. It is applicable only when the billing preference characteristic is added or updated for an account.

When the billing preference characteristic type is defined or updated for an account either from the user interface or through an inbound web service, the system derives the bill period from the billing preference. If the bill period is changed for the account, the system creates an audit event and sets its status to **Pending**. An effective date is stamped corresponding to the audit event which later helps in deriving the timeline during premium calculation.

The system sets the effective date of an audit event in the following manner:

- If you add or update the billing preference characteristic type of an account from a period for which billing is yet pending, the system sets the effective date of the audit event to the characteristic effective date.
- If you add or update the billing preference characteristic type of an account from a period for which billing is already completed, the system sets the effective date of the audit event to the Latest Bill Segment End Date + 1.
- If you add or update the billing preference characteristic type of an account from any date other than the start of the bill period, the system sets the effective date of the audit event to the start date of the next bill period.
- If you add or update the membership details along with the billing preference characteristic type of the respective account, the system sets the effective date of the audit event to the membership audit effective date or characteristic effective date whichever is earliest.

Note: Before creating an audit event, the system checks whether an audit event for the account ID with the same effective date already exists in the **Pending** or **Error** status for the respective action. If so, the system does not create a new audit event for the account. Instead, the system adds a new log entry in the existing audit event.

Once the audit event is created, the system does the following for the respective business:

- **Fully Insured Individual Business** – The system derives the membership that is billed through the account. If the category of the membership is set to **INDV**, the system identifies the health plan to which the membership belongs. It then derives the pricing rule types whose active pricing rules are defined on the respective health plan. A repricing entity detail record is then created for each membership, pricing rule type, and effective date combination in the **CI_REPRC_ENTITY_DTL** table. The status of the repricing entity detail record is set to **Pending**. Once the repricing entity detail records are created successfully, the status of the audit event is changed to **Complete**. However, if an error occurs while creating the repricing entity detail records for an audit event, the status of the audit event is set to **Error**.
- **Fully Insured Group Business** – The system derives the main customer of the account. If the main customer of the account is **Bill Group**, the system leaves the audit event in the **Pending** status. You need to then execute a new batch named **C1-FIACT**. This batch checks whether there is any audit event created for an account in the **Pending** status. If so, it extracts the list of group memberships which are billed to the account and identifies the policy plan to which these memberships belong. It then derives the pricing rule types whose active pricing rules are defined on the respective policy plan. A repricing entity detail record is created for each membership, pricing rule type, and effective date combination in the **CI_REPRC_ENTITY_DTL** table. The status of the repricing entity detail record

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is set to **Pending**. Once the repricing entity detail records are created successfully, the status of the audit event is changed to **Complete**. However, if an error occurs while creating the repricing entity detail records for an audit event, the status of the audit event is set to **Error**.

Note: The following batches should be executed in the specified sequence – **C1-FIBLR**, **C1-FIMRE**, **C1-FIACT**, **C1-CBIPR**, **C1-FIMRC**.

To recalculate the membership premium, you need to then execute the following batches in the specified order – **C1-REPC1**, **C1-REPC2**, **C1-REPC3**, **C1-FIBCR**.

Note: This feature is tested and certified for the fully insured group and individual lines of health insurance business.

Premium Proration Rules

Until now, the system used the service quantity rule named **PR** attached to the **HCPREMPS** rate schedule to calculate the proration factor for the membership premium. Now, Oracle Revenue Management and Billing enables you to prorate the membership premium using the proration rules defined on the fully-insured group policy plan. A proration rule indicates how you want to prorate the membership premium on various events, such as enrollment, termination, etc. In a proration rule, you need to specify the following:

- **Effective Date** - Used to specify the date from when the proration rule is effective. However, the system considers the latest proration rule and not the effective proration rule while prorating the membership premium.
- **Proration Event Type** - Used to indicate the event when the membership premium should be prorated. The valid values are:
  - **Enrollment** - Used to indicate that you want to prorate the membership premium on enrollment based on the specified proration type.
  - **Termination** - Used to indicate that you want to prorate the membership premium on termination based on the specified proration type.
  - **New Born** - Used to indicate that you want to prorate the membership premium on new born enrollment based on the specified proration type.
  - **Same Month Enrollment and Termination** - Used to indicate that you want to prorate the membership premium when the member person enrolls and terminates in the same month based on the specified proration type.
- **Proration Type** - Used to indicate how you want to prorate the membership premium. The valid values are:
  - **Daily** - Used to indicate that you want to prorate the membership premium from the day the proration event has occurred.
  - **Mid-Month** - Used to indicate that you want to prorate the membership premium based on the proration date. The system calculates the proration date using the following formula: Bill Period Start Date - Specified Number of Days. For example, if the bill period start date is 1st of every month and number of days is 15, then the proration date would be 15th of every month. If a member person is enrolled to the membership on or before the proration date, the system will charge the premium for the member person. However, if a member person is enrolled to the membership after the proration date, the system will not charge the premium for the member person. And, if a member person is terminated from the membership on or after the proration date, the system will charge the premium for the member person. However, if a member person is terminated from the membership before the proration date, the system will not charge the premium for the member person.
  - **Full Month** - Used to indicate that the premium for a member person should be charged when the member person is enrolled or terminated on the coverage start date or coverage end date, respectively. If a member person is enrolled or terminated within the coverage period, the system will not charge the premium for the member person.
  - **Waiver** - Used to indicate that the premium for a member person should be waived off completely for the month when the member person is enrolled or terminated from the membership.
  - **Coverage Days**- Used to indicate that you want to prorate the premium for a member person based on the coverage days. If a member person is covered in the membership for a period less than the specified number of days, the system will not charge the premium for the member person. However, if a member person is covered in the membership for a period equal to or more than the specified number of days, the system will charge the

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premium for the member person. You can use this proration type when the proration event is set to **Same Month Enrollment and Termination**.

- **Enrollment** - Used to indicate that you want to prorate the premium for a member person using the proration type of the enrollment event. You can use this proration type only when the proration event is set to **Same Month Enrollment and Termination**.
- **Termination** - Used to indicate that you want to prorate the premium for a member person using the proration type of the termination event. You can use this proration type only when the proration event is set to **Same Month Enrollment and Termination**.

- **Number of Days** - Used to specify the number of days to determine the cutoff date when the proration type is set to Mid-Month or Coverage Days.

The following table indicates the proration types which are applicable for a particular proration event:

Proration Event	**Proration Type**
Enrollment	Daily, Mid-Month, Full Month, Waiver
Termination	Daily, Mid-Month, Full Month, Waiver
New Born	Daily, Mid-Month, Full Month, Waiver
Same Month Enrollment and Termination	Coverage Days, Enrollment, Termination, Waiver

Note that if the proration rule is not defined for the **New Born** event, the system uses the proration rule of the **Enrollment** event. The system enables you to define and edit the proration rules for a policy plan from the user interface or through a health care inbound message.

Once the membership premium is calculated either using an age based or tier based pricing rule, the system checks whether the proration rules are defined for the respective policy plan. If so, the system sets the base amount of the corresponding record in the **CI_PRCE_CALC_LN** table to the calculated premium amount. However, if the proration rules are not defined for the respective policy plan, the system sets the base amount of the corresponding record in the **CI_PRCE_CALC_LN** table to the calculated premium amount and proration factor is set to 1.

The system then executes the **C1-AGEPRFC** or **C1-TIERPRFC** algorithm attached to the **Pricing Rule Proration Amount Calculation** system event in the respective age based or tier based pricing rule type. The system invokes these algorithms in the **C1-REPC2** batch. These algorithms derive the proration event for a bill period timeline and accordingly updates the proration factor of the bill period timeline to 1 or 0 for all proration types except Daily. The proration factor is set to 1 when the premium for eligible member person (in case of age based pricing) and the premium for the membership (in case of tier based pricing) should be charged for the bill period timeline. And, proration factor is set to 0 when the premium for eligible member person (in case of age based pricing) and the premium for the membership (in case of tier based pricing) should not be charged for the bill period timeline. In case of the Daily proration type, the proration factor is calculated using the following formula: Number of Days Covered in the Coverage Period/Coverage Period

In case of tier based pricing, the system uses the subscription tier characteristic of the membership to determine the proration event.

Age Monitoring

Age is one of the most critical factor in determining health insurance premium. Therefore, Oracle Revenue Management and Billing enables you to monitor age for premium calculation.

In the age based pricing, the premium is calculated for each eligible member person based on age, employee attributes and modifiers, and then aggregated to derive the total premium for the membership. Until now, the age of a member person was calculated using the member enrollment date, plan start date, or policy renewal or start date. Now, in addition, a new predefined value named **MEMNRAGE (Member Enrollment Nearest Age)** is added to the **Age Calculation Date Basis (C1-AGCAL)** characteristic type. If you set the **C1-AGCAL** characteristic type to **MEMNRAGE**, the system considers the number of days specified in the **C1-PPRAMAGE** algorithm to calculate the nearest age of a

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member person. The system then derives the rate using the nearest age of the member person and accordingly calculates the premium for the member person. For example, a member person with the date of birth as 02-15-1980 has enrolled to the HMO Med Bronze plan from 01-01-2020 to 12-31-2020. And, the **C1-AGCAL** characteristic type is set to **MEMNRAGE** on the HMO Med Bronze plan where the following age based pricing is defined:

Age Group	**Rate Value**
0-15	$100.00
16-18	$120.00
19-20	$140.00
21-40	$160.00
41-60	$180.00
61-65	$200.00
66-99	$250.00

Let us assume that the **No. of Days** parameter in the **C1-PPRAMAGE** algorithm is set to **90**. The system will calculate the nearest age of the member person through a cutoff date which is calculated using the following formula: Member Enrollment Date + No. of Days. In this case, the cutoff date is 03-30-2020 (01-01-2020 + 90). If the birthday of the member person falls within the cutoff date, the system charges the premium based on the nearest age. However, if the birthday of the member person does not fall within the cutoff date, the system charges the premium based on the actual age. In this case, the birthday falls within the cutoff date, and therefore the premium will be charged using the rate defined for the 41-60 age group (i.e. $180) and not using the rate defined for the 21-40 age group (i.e. $160).

Oracle Revenue Management and Billing enables you to recalculate the age of a member person in a membership in the following scenarios:

- When the policy is renewed
- When the age changes
- From the next month when the age changes

A new characteristic type named **Age Recalculation Date Basis (C1-AGREC)** is introduced in this release. We support the following predefined list of values:

- AGECHNG (Age Changes)
- CHGAGNTMNT (Next Month)
- RENEWAL (Policy Renewal)

If you want to recalculate the membership premium for a plan based on the recalculated age of a member person, you need to do the following:

- Define the **Age Recalculation Date Basis (C1-AGREC)** characteristic for the policy plan or for the policy to which the plan belongs
- Set the **Age Re-Calculation Date Basis** attribute to **Age Recalculation Date Basis (C1-AGREC)** in the age based pricing rule type which is associated with the policy plan

The system does the following when you add a membership to a policy plan or a member person to a membership:

If the Age Recalculation Date Basis characteristic type is set to…	**Then,**
AGECHNG	The system creates an audit event for a member person when the birthday falls within the enrollment date range. Here, the effective date of the audit event is set to the birth date of the member person.
CHGAGNTMNT	The system creates an audit event for a member person when the birthday falls within the enrollment date range. Here, the effective date of the audit event is set

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If the Age Recalculation Date Basis characteristic type is set to…	Then,
	to the billing date of the next month. For example, if the bill date in a bill period starts 1st of every month and the date of birth of a member person is 05-10-2020, the effective date of the audit event is set to 01-11-2020.
RENEWAL	The system creates an audit event for a member person when the birthday falls within the new enrollment date range (i.e. from original policy end date+1 to new policy end date). Here, the effective date of the audit event is set to the birth date of the member person.

Apart from the membership premium recalculation, the **Age Recalculation Date Basis (C1-AGREC)** characteristic is used to evaluate the member relationship characteristic of each member person and subscription tier characteristic of the membership when the **Young Adult Applicability** characteristic is set to **Y** and the child or dependent enrolling to the membership becomes young adult in the enrollment period.

The **C1-FIAUDEV** algorithm is enhanced to support the age recalculation feature. It creates audit events in the C1_AUDIT_EVENT table and repricing entity detail records in the CI_REPRC_ENTITY_DTL table when the age of a member person changes within the enrollment period.

State of Issue

The State of Issue feature enables you to search for the following characteristics on a state:

- Maximum Number of Dependents
- Maximum Age Limit for Maximum Dependent Count
- Maximum Number of Dependents Order Priority
- Age Calculation Date Basis
- Newborn Gift Days
- Newborn Gift Days Applicability
- Young Adult Max Age Limit
- Young Adult Inclusion Applicability

It helps in identifying a list of eligible children in a membership. To enable the State of Issue feature, you need to do the following:

1. Define a predefined characteristic type named **State of Issue** where the characteristic entity is set to **Membership**, **Policy Plan** and **Policy**.
2. Define the required states as the predefined values for the **State of Issue** characteristic type.
3. Set the **State of Issue** characteristic type in the **State of Issue Characteristic Type** option type of the **C1-ASOBLLNG** feature configuration.

If the State of Issue feature is enabled, the system checks whether the **State of Issue** characteristic is defined for the membership when any of the above required characteristic is not defined at the membership person and membership levels. If the **State of Issue** characteristic is defined for the membership, the system checks whether the above required characteristic is defined on the state where the membership is issued. For example, if the **State of Issue** characteristic on the M1 membership is set to **California**, then the system will search for any of the above required characteristic on the **California** state. If the required characteristic is defined for the state, the system considers it while identifying a list of eligible children in the membership.

If the required characteristic is not defined at the membership person, membership, state where the membership is issued and policy plan levels, the system checks whether the **State of Issue** characteristic is defined for the policy plan. If the **State of Issue** characteristic is defined for the policy plan, the system checks whether the above required characteristic is defined on the state where the policy plan is issued. If the required characteristic is defined for the state, the system considers it while identifying a list of eligible children in the membership.

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However, if the required characteristic is not defined at the membership person, membership, state where membership is issued, policy plan, state where the policy plan is issued, and policy levels, the system checks whether the **State of Issue** characteristic is defined for the policy. If the **State of Issue** characteristic is defined for the policy, the system checks whether the above required characteristic is defined on the state where the policy is issued. If the required characteristic is defined for the state, the system considers it while identifying a list of eligible children in the membership.

Related Topics

For more information on...	See...
Audit Framework for Fully-Insured Group Health Insurance Billing	Audit Framework for Fully-Insured Billing on page 3466
Bill Group Derivation for Membership	Bill Group Derivation for Membership on page 3489
Account and Price Item Derivation for Membership	Account and Price Item Derivation for Membership on page 3491
Membership Premium Calculation	Membership Premium Calculation on page 3484
Repricing	Repricing on page 3495
Fully-Insured Group Billable Charge Creation	Fully-Insured Billable Charge Creation on page 3496

Membership Premium Calculation

The membership premium is calculated differently using the following pricing:

- **Age-Based Pricing** - The system first identifies a list of members which are eligible for premium calculation in a membership. It derives the main subscriber and member persons (i.e. Spouse and Children) which are related to the main subscriber using the relationship type specified in the **Age Based** pricing rule type. To identify a list of eligible children for premium calculation, the system uses the following characteristics:
  - **Maximum Number of Dependents** - Used to indicate the maximum number of children which are eligible for premium calculation.
  - **Maximum Age Limit for Maximum Dependent Count** - Used to indicate the maximum age limit for children which are eligible for premium calculation.
  - **Maximum Number of Dependents Order Priority** - Used to indicate whether you want to consider the youngest or eldest children during premium calculation. The valid values are - **YOUNGEST** and **ELDEST**.
  - **Age Calculation Date Basis** - Used to indicate whether the member person's age should be calculated using the member person's enrollment date or policy's start or renewal date.
  - **Newborn Gift Days** - Used to indicate the number of days you want to offer as gift days from the new born child's birth date. As a result, no premium will be calculated for this period.
  - **Newborn Gift Days Applicability** - Used to indicate whether you want to offer gift days in case of a new born. The valid values are - **Y** and **N**.
  - **Young Adult Max Age Limit** - Used to indicate the maximum age limit for young adults which are eligible for premium calculation.
  - **Young Adult Inclusion Applicability** - Used to indicate whether you want to consider the young adults during the premium calculation. The valid values are - **Y** and **N**.

Note: Only the **Age Calculation Date Basis (C1-AGCAL)** characteristic type is shipped with the product. You need to create the remaining characteristic types in the system and set their characteristic entity to the following - **Membership Person**, **Membership**, **Policy Plan**, **Policy**, and/or **State**.

The system searches for these characteristics on the following entities in the specified sequence:

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1. Membership Person
2. Membership
3. State where the Membership is issued
4. Policy Plan
5. State where the Policy Plan is Issued
6. Policy
7. State where the Policy is Issued

For example, if the **Maximum Number of Dependents** characteristic is defined for all entities, the system considers the characteristic which is defined at the Member Person level because it is the lowest level. However, if the **Newborn Gift Days Applicability** characteristic is defined at the Policy Plan and Policy levels, the system considers the characteristic which is defined at the Policy Plan level because it is the lowest level. In other words, the system crawls from the lowest to the highest level while searching for the above characteristics. You can also define the above characteristics on the state where the membership, policy plan and/or policy are issued. For more information, refer to the State of Issue section.

Once the eligible members for premium are identified, the system derives the base fee and applicable modifier fee which are defined in the pricing rules. The system then calculates the timeline for each membership and price item combination. The timeline is basically calculated to understand the period for which the premium is applicable. For example, if a policy plan named **P1** has the following membership:

Membership	M1
Member Persons	P1 and P2
Membership Start Date	01-01-2019
Membership End Date	31-12-2019
P0 Main Subscriber's Start Date	01-01-2019
P0 Main Subscriber's End Date	31-12-2019
P1 Member's Start Date	01-01-2019
P1 Member's End Date	30-06-2019
P2 Member's Start Date	01-10-2019
P2 Member's End Date	31-12-2019

The **P1** policy plan is associated with an Age Based pricing rule type which contains the **Premium Fee** price item. The Age Based pricing rule for the **Premium Fee** price item is effective from 01-01-2019 to 31-12-2019.

In this case, the system will create the following timelines when you add **P2** member person in the **M1** membership:

Membership	**Price Item**	**Timeline Start Date (Effective Date)**	**Timeline End Date**
M1	Premium Fee	01-01-2019	30-06-2019 (i.e. P1 Member's End Date)
M1	Premium Fee	01-07-2019	30-09-2019
M1	Premium Fee	01-10-2019 (i.e. P2 Member's Start Date)	31-12-2019

It creates timelines using the membership's start and end dates, member person's start and end dates, and effective date. For each timeline, the system calculates the premium for all eligible member persons in the membership. Let us assume that the effective pricing rule is configured in the following manner:

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Age Band	Fee
0-21	$50
21-65	$100
>65	$150

P0 belongs to the 21-65 age band and P1 and P2 belongs to the 0-21 age band. Therefore, the premium is calculated using the following base fee:

Membership	Price Item	Timeline Start Date (Effective Date)	Timeline End Date	Base Fee
M1	Premium Fee	01-01-2019	30-06-2019 (i.e. P1 Member's End Date)	P0: $100 P1: $50
M1	Premium Fee	01-07-2019	30-09-2019	P0: $100
M1	Premium Fee	01-10-2019 (i.e. P2 Member's Start Date)	31-12-2019	P0: $100 P2: $50

Now, let us assume the following characteristics are defined on the **P1** policy plan which offers gift days to a new born child:

Effective Date	Characteristic Type	Characteristic Value
01-01-2019	Newborn Gift Days Applicability	Y
01-01-2019	Newborn Gift Days	30

Now, if the main subscriber adds his child named **C1** who is born on 05-03-2019, the system will create the following timelines:

Membership	Price Item	Timeline Start Date (Effective Date)	Timeline End Date
M1	Premium Fee	01-01-2019	03-04-2019 (i.e. 05-03-2019 +30 Days)
M1	Premium Fee	04-04-2019 (New Born Considered for Premium Calculation)	30-06-2019 (i.e. P1 Member's End Date)
M1	Premium Fee	01-07-2019	30-09-2019
M1	Premium Fee	01-10-2019 (i.e. P2 Member's Start Date)	31-12-2019

It creates timelines using the membership's start and end dates, member person's start and end dates, and effective date. For each timeline, the system calculates the premium for all eligible member persons in the membership. In this case, the premium is calculated using the following base fee:

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Membership	Price Item	Timeline Start Date (Effective Date)	Timeline End Date	Base Fee
M1	Premium Fee	01-01-2019	03-04-2019 (i.e. 05-03-2019 +30 Days)	P0: $100 P1: $50
M1	Premium Fee	04-04-2019 (New Born Considered for Premium Calculation)	30-06-2019 (i.e. P1 Member's End Date)	P0: $100 P1: $50 C1: $50
M1	Premium Fee	01-07-2019	30-09-2019	P0: $100 C1: $50
M1	Premium Fee	01-10-2019 (i.e. P2 Member's Start Date)	31-12-2019	P0: $100 P2: $50 C1: $50

- **Tier Based Pricing** - The system first derives the base fee which is defined in the pricing rules. It then calculates the timeline for each membership and price item combination. The timeline is basically calculated to understand the period for which the premium is applicable. For example, if a policy plan named **P2** has the following membership:

Membership	M1
Member Persons	P1 and P2
Membership Start Date	01-01-2019
Membership End Date	31-12-2019
Membership Tier	ES (Employee + Spouse)

The **P2** policy plan is associated with a Tier Based pricing rule type which contains the **Premium Fee** price item. The Tier Based pricing rule for the **Premium Fee** price item is effective from 01-01-2019 to 31-12-2019.

The system will create the following timeline when the **M1** membership is added to the **P2** policy plan:

Membership	Price Item	Timeline Start Date (Effective date)	Timeline End Date
M1	Premium Fee	01-01-2019	31-12-2019

It creates timelines using the membership's start and end dates and effective date. For each timeline, the system calculates premium for the membership. Let us assume that the effective pricing rule is configured in the following manner:

Tier Level	Fee
E (Employee Only)	$100
ES (Employee + Spouse)	$200
F (Family)	$350
EC (Employee+ Children)	$150

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The **M1** membership belongs to the **ES (Employee + Spouse)** tier. Therefore, the premium is calculated using the following base fee:

Membership	Price Item	Timeline Start Date (Effective Date)	Timeline End Date	Base Fee
M1	Premium Fee	01-01-2019	31-12-2019	$200

Now, let us assume the following characteristics are defined on the **P2** policy plan which offers gift days to a new born child:

Effective date	Characteristic Type	Characteristic value
01-01-2019	Newborn Gift Days Applicability	Y
01-01-2019	Newborn Gift Days	30

Now, if the main subscriber adds his child named **C1** who is born on 05-03-2019, the system will create the following timelines:

Membership	Price Item	Timeline Start Date (Effective date)	Timeline End Date
M1	Premium Fee	01-01-2019	03-04-2019 (i.e. 05-03-2019 +30 Days)
M1	Premium Fee	04-04-2019 (New Born Considered for Premium Calculation)	31-12-2019

In this case, the premium is calculated using the following base fee considering the membership tier has changed from **ES (Employee + Spouse)** to **F (Family)**:

Membership	Price Item	Timeline Start Date (Effective Date)	Timeline End Date	Base Fee
M1	Premium Fee	01-01-2019	03-04-2019 (i.e. 05-03-2019 +30 Days)	200
M1	Premium Fee	04-04-2019 (New Born Considered for Premium Calculation)	31-12-2019	350

The tasks performed through **Membership Repricing (C1-MEMBREPRICE)** inbound web service are described below:

- **Adding a Membership** - Whenever you are creating a membership for a policy or health plan, you need to specify the plan for which you want to create the membership, a person who is the main subscriber of the membership, and the way in which the main subscriber is related to the membership. Once the membership is created, you can add more members (i.e.persons) to the membership.
- **Editing a Membership** - Once the membership is created for a policy or health plan, you can edit the membership information such as start date, end date, and characteristics.
- **Viewing the Membership Details** - On the **Membership** page, you can view the membership details, member persons which are added to a membership, and the additional plans of the main subscriber.
- **Adding a Member Person to a Membership** - While adding a person to a membership, you need to specify whether the person is the main subscriber of the membership, whether the person is financially responsible for the

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membership, and how the person is related to the main subscriber. At a time, only one person can be the main subscriber of the membership.

- **Removing a Member Person from a Membership** - You cannot remove a member person, who is the main subscriber, from the membership. You can inactivate a member person whenever required. If you inactivate a member person who is the main subscriber of the membership, the system automatically inactivates the membership and all other member persons which are included in the membership.
- **Simulating Membership Premium Calculation**

  - You can simulate add and update operations carried-out for a membership, and can also calculate the premium derived from the simulation process. Any set of changes conducted as a part of the simulation process would not impact the actual membership and premium calculation process.

Bill Group Derivation for Membership

While deriving a bill group for a membership, the system first checks whether the characteristics specified in the following option types of the **C1-ASOBLLNG** feature configuration are defined for the membership:

- **Account Identifier Type Char Type** - Used to specify the characteristic type which stores the identifier type of the account to which the membership should be billed. Here, you must specify a characteristic type where the characteristic entity is set to **Membership**.
- **Account Identifier Value Char Type** - Used to specify the characteristic type which stores the corresponding identifier of the account to which the membership should be billed. Here, you must specify a characteristic type where the characteristic entity is set to **Membership**.

If the above two characteristics are defined for the membership, the system derives the account and then the person (i.e. bill group or parent customer) to which the account belongs. However, if the above two characteristics are not defined for the membership, the system then checks whether the characteristics specified in the following option types of the **C1-ASOBLLNG** feature configuration are defined for the membership:

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

If the above two characteristics are defined for the membership, the system derives the person (i.e. bill group or parent customer) to which the membership should be billed. However, if the above two characteristics are not defined for the membership, the system checks whether the characteristics specified in the following parameters of the **C1_MEMBGDRV** algorithm are defined for the membership:

- **Characteristic Type for Bill level 1** - Used to specify the characteristic type which stores the bill group derivation and pricing parameter 1 for the membership. Here, you must specify a characteristic type where the characteristic entity is set to **Membership**.
- **Characteristic Type for Bill level 2** - Used to specify the characteristic type which stores the bill group derivation and pricing parameter 2 for the membership. Here, you must specify a characteristic type where the characteristic entity is set to **Membership**.
- **Characteristic Type for Bill level 3** - Used to specify the characteristic type which stores the bill group derivation and pricing parameter 3 for the membership. Here, you must specify a characteristic type where the characteristic entity is set to **Membership**.
- **Characteristic Type for Bill level 4** - Used to specify the characteristic type which stores the bill group derivation and pricing parameter 4 for the membership. Here, you must specify a characteristic type where the characteristic entity is set to **Membership**.
- **Characteristic Type for Source system** - Used to specify the characteristic type which stores the external system from where the fully-insured policy is received for billing. Here, you must specify a characteristic type where the

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characteristic entity is set to **Membership**, **Policy Plan**, or **Policy**. The system searches for the characteristic on the following entity in the specified order:

1. Membership
2. Policy Plan
3. Policy

If the characteristic is defined at first level (i.e. membership), the system will not search for the characteristic at the subsequent levels. However, if the characteristic is not defined at first level, the system will search for the characteristic at the second level (i.e. policy plan). If the characteristic is defined at second level, the system will not search for the characteristic at the subsequent level. However, if the characteristic is not defined at second level, the system will search for the characteristic at the third level (i.e. policy).

To derive the source system from the membership, policy plan, or policy, the system first derives the policy plan to which membership belongs and then the policy to which the policy plan belongs. The above characteristics indicate the Source System, Parameter 1, Parameter 2, Parameter 3, and Parameter 4. The system derives a bill group using the derivation and pricing parameters (i.e. Source System, Parameter 1, Parameter 2, Parameter 3, and Parameter 4) which are defined for the bill group. Note that the system considers the derivation and pricing parameters which are effective on the effective date (which is available corresponding to the record in the **CI_REPRC_ENTITY_DTL** table). It first searches for the bill group using the exact match. Let us understand this with the help of an example.

The following table illustrates the derivation and pricing parameters defined for various bill groups which belong to the PC1 parent customer:

Bill Group	**Derivation and Pricing Parameters**				
	Source System	**Parameter 1**	**Parameter 2**	**Parameter 3**	**Parameter 4**
BG1	X	Western	Grade A	Active	-
BG2	X	Western	Grade A	Retiree	-
BG3	Y	Western	-	-	-

And, the following characteristics are defined for the M1 membership which belongs to the PP1 policy plan:

Entity	**Characteristic Type**	**Characteristic Value**
M1	Location	Western
M1	Grade	Grade A
PP1	External System	X

Now, if the **Location**, **Grade**, and **External System** characteristic types are specified in **Characteristic Type for Bill level 1**, **Characteristic Type for Bill level 2**, and **Characteristic Type for Source system** parameters of the **C1_MEMBGDRV** algorithm, the system searches for a bill group where the following derivation and

If the exact match is not available, the system finds the bill group using the best fit match.

Once the policy and policy plan is derived, the system

Based on the characteristic values on the membership for bill level 1 to bill level 4 and characteristic value of source system, the bill group and parent customer corresponding to the membership is derived. 2. Deriving policy : Policy is derived from the plan to which the membership is linked.

To derive the bill group for a membership to which its premium and other pass-through charges should be billed, you need to attach an algorithm created using the **C1_MEMBGDRV** algorithm type to the **Bill Group Derivation** system event in a pricing rule type where the category is set to **Age Based**, **Tier Based**, or **Pass-Through Billable Charge**.

Note that while searching for a bill group, the source system and Parameter 1 (i.e. Bill Level 1) are mandatory.

This algorithm contains the following parameters:

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- **Characteristic Type for Bill Level 1** - Used to indicate the characteristic type. This characteristic type must be defined on the membership. It is used to store the derivation and pricing parameter 1 for the membership.
- **Characteristic Type for Bill Level 2** - Used to indicate the characteristic type. This characteristic type must be defined on the membership. It is used to store the derivation and pricing parameter 2 for the membership.
- **Characteristic Type for Bill Level 3** - Used to indicate the characteristic type. This characteristic type must be defined on the membership. It is used to store the derivation and pricing parameter 3 for the membership.
- **Characteristic Type for Bill Level 4** - Used to indicate the characteristic type. This characteristic type must be defined on the membership. It is used to store the derivation and pricing parameter 4 for the membership.

Once the bill group is derived, the system derives the parent customer of the bill group. If the system could not derive the policy, bill group, or parent customer, the status of the record is changed to **Error (E)** in the CI_REPRC_ENTITY_DTL table.

Related Topics

For more information on...	See...
Audit Framework for Fully-Insured Billing	Audit Framework for Fully-Insured Billing on page 3466
Account and Price Item Derivation for Membership	Account and Price Item Derivation for Membership on page 3491
State of Issue	State of Issue on page 3483
Membership Premium Calculation	Membership Premium Calculation on page 3484
Repricing	Repricing on page 3495
Fully-Insured Billable Charge Creation	Fully-Insured Billable Charge Creation on page 3496

Account and Price Item Derivation for Membership

A new algorithm type named **C1_ACCPRIMEM** is added in this release. You need to attach an algorithm created using the **C1_ACCPRIMEM** algorithm type to the **Account and Price Item Derivation** system event in a pricing rule type where the category is set to **Age Based**, **Tier Based**, or **Pass-Through Billable Charge**.

This algorithm fetches the effective pricing rule for each price item specified in the pricing rule type on the effective date. It first searches for effective pricing rules on the policy plan to which the membership belongs. If the system does not find any effective pricing rule for a price item on the policy plan, it inherits the effective pricing rule for the price item from the parent customer level. The system then derives the account with a particular invoice type (to which a price item must be billed) based on the priority which is defined for the respective price item in the pricing rule type. Once the account is derived, the system then checks whether the account has one active contract of the contract type which is associated with the price item. If so, it fetches the contract for further processing. If the system could not derive the effective pricing rule for any price item or if the account or active contract for the account could not be derived, the status of the record is changed to **Error (E)** in the CI_REPRC_ENTITY_DTL table.

Related Topics

For more information on...	See...
Audit Framework for Fully-Insured Group Health Insurance Billing	Audit Framework for Fully-Insured Billing on page 3466
Bill Group Derivation for Membership	Bill Group Derivation for Membership on page 3489
State of Issue	State of Issue on page 3483

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For more information on...	See...
Membership Premium Calculation	Membership Premium Calculation on page 3484
Repricing	Repricing on page 3495
Fully-Insured Group Billable Charge Creation	Fully-Insured Billable Charge Creation on page 3496

Tightly Coupled Bill Cycle and Bill Period through Billing Preference

Oracle Revenue Management and Billing uses the bill cycle of an account to generate the bills for the account and the bill period of an account to create the billable charges for the account. If the bill cycle and bill period used for an account are not in sync, the system will not give the desired output. To handle this issue, a new feature is introduced wherein the bill cycle and bill period can be tightly coupled with each other.

Note:

This feature is designed, developed, and tested only for the health insurance domain and not for the financial services domain.

This feature is tested and certified for the fully insured group and fully insured individual lines of business.

You can define a billing preference wherein you can pair the bill cycle and bill period. The system then derives the bill cycle and bill period for an account from the billing preference. You can set the billing preference for an account through a characteristic type that is specified in the **Bill Cycle Rule Code** option type of the **C1-ASOBLLNG** feature configuration. You can define this characteristic for an account from the user interface or through a health care inbound message.

Note: We have not shipped a billing preference characteristic type with the product. You must create a billing preference characteristic type where the characteristic entity is set to **Account**.

Bill Cycle Derivation

Whenever you create or edit an account from the user interface or through a health care inbound message, the system checks whether the characteristic type specified in the **Bill Cycle Rule Code** option type of the **C1-ASOBLLNG** feature configuration is defined for the account. If so, the system checks whether the value specified for the billing preference characteristic type is already defined in the system. If so, the system derives the bill cycle from the **Bill Cycle** attribute of the billing preference. In such case, the system ignores the bill cycle if explicitly provided for the account from the user interface or through the inbound message.

However, if the **Bill Cycle Rule Code** option type is not defined in the **C1-ASOBLLNG** feature configuration or if the billing preference characteristic type is not defined for an account, the system considers the bill cycle which is explicitly provided for the account. In addition, when the billing preference characteristic is updated for an account from the user interface or through a health care inbound message, the system derives the new bill cycle from the respective billing preference in the system.

Note:

The bill cycle is derived from the billing preference while creating or editing an account only when the **C1-DERIVEBLC** algorithm is attached to the **Post-Processing** system event of the business object using which the account is created in the system.

If the billing preference specified for the account does not exist in the system, an appropriate To Do is created for the user indicating that the specified billing preference is invalid.

Bill Period Derivation

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Until now, the system derived the bill period for an account using the **Invoice Day (C1OFFRST)** characteristic of the account. Now, alternatively, the system also allows you to derive the bill period for an account from the billing preference which is defined using the billing preference characteristic type. The system considers the billing preference characteristic type specified in the **Bill Cycle Rule Code** option type of the **C1-ASOBLLNG** feature configuration.

To derive the bill period from the billing preference, you need to attach the **Bill Period Derivation (C1-BILLPDRV)** algorithm to the **Account and Price Item Derivation Post-Processing** system event of the age based, tier based, additional fee, benefit, and/or discount charge pricing rule types. The system invokes the **C1-BILLPDRV** algorithm in the **C1-REPC1** batch. This algorithm derives the bill period for the account from the billing preference. It sets the **RECURRING_FLG** column to **BP** (i.e., Bill Period) and **RECURRING_VAL** column to the bill period derived from the billing preference corresponding to the record in the **CI_REPRC_REQ_DTL** table. For more information, see C1-BILLPDRV on page 3369.

Note: If the **Bill Cycle Rule Code** option type is not defined in the **C1-ASOBLLNG** feature configuration, or if the billing preference characteristic type is not defined for an account, or if the **C1-BILLPDRV** algorithm is not attached to the pricing rule type, the system derives the bill period for the account using the traditional manner (i.e., using the **C1-FIBCBP** algorithm attached to the **Billable Charge Creation Pre-Processing** system event of the respective pricing rule type).

Related Topics

For more information on...	See...
Billing Preference	Billing Preference on page 3615
C1-BILLPDRV algorithm	C1-BILLPDRV on page 3369
How to setup the **C1-ASOBLLNG** feature configuration	Setting the C1-ASOBLLNG Feature Configuration on page 4417

Bill Period Timeline

Prerequisites

To create a bill period timeline, you need to ensure the following:

- Bill period is defined in the system.
- Derived bill period is monthly where the bill dates start from 1st of every month.

On enrolling a group or individual membership, the system creates a timeline for each month of the membership coverage period in the **CI_REPRC_REQ_DTL** table. It refers the derived bill period while creating the timelines for the repricing record. For example, when a membership is enrolled for the coverage period 01-Jan-2025 to 31-Dec-2025, the system creates a timeline for each month starting from 1st Jan 2025 using the bill period (as shown in the below table).

Bill Period	Bill Period Timeline with Effective Date
01-01-2025 to 01-31-2025	TL1 with 01-01-2025
02-01-2025 to 02-29-2025	TL2 with 02-01-2025
03-01-2025 to 03-31-2025	TL3 with 03-01-2025
04-01-2025 to 04-30-2025	TL4 with 04-01-2025
05-01-2025 to 05-31-2025	TL5 with 05-01-2025
06-01-2025 to 06-30-2025	TL6 with 06-01-2025
07-01-2025 to 07-31-2025	TL7 with 07-01-2025

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Bill Period	Bill Period Timeline with Effective Date
08-01-2025 to 08-31-2025	TL8 with 08-01-2025
09-01-2025 to 09-30-2025	TL9 with 09-01-2025
10-01-2025 to 10-31-2025	TL10 with 10-01-2025
11-01-2025 to 11-30-2025	TL11 with 11-01-2025
12-01-2025 to 12-31-2025	TL12 with 12-01-2025

However, if a repricing is triggered for a membership due to any change (for example, a newborn entry) effective from 01-Jun-2025, then the system creates a timeline for each month starting from 1st June 2025 using the bill period (as shown in the below table).

Bill Period	Bill Period Timeline with Effective Date
06-01-2025 to 06-30-2025	TL1 with 01-01-2025
07-01-2025 to 07-31-2025	TL2 with 02-01-2025
08-01-2025 to 08-31-2025	TL3 with 03-01-2025
09-01-2025 to 09-30-2025	TL4 with 04-01-2025
10-01-2025 to 10-31-2025	TL5 with 05-01-2025
11-01-2025 to 11-30-2025	TL6 with 06-01-2025
12-01-2025 to 12-31-2025	TL7 with 07-01-2025

To create timelines for a repricing record, you need to attach the **Bill Period Timeline Creation** (**C1-BILLRPCR**) algorithm to the **Account and Price Item Derivation Post-Processing** system event of the age based, tier based, additional fee, benefit, and/or discount charge pricing rule types. The system invokes the **C1-BILLRPCR** algorithm in the **C1-REPC1** batch. This algorithm creates a bill period timeline for the membership. For more information, see C1-BILLRPCR on page 3369.

9/10 Billing (Skip Months)

In the health insurance domain, for a yearly coverage, the membership premium is calculated and billed every month. The fully-insured large groups such as school districts have two-three months of holiday every year. Usually, they prefer to distribute the off months' premium in the remaining months of the coverage period. Oracle Revenue Management and Billing enables you to handle this requirement through the **9/10 Billing (Skip Months)** feature. Note that, in this feature, only the recurring charges for membership premium and administration fees will be considered for distribution in the non-skip months of the coverage period.

You can set the skip months in a billing preference through the **Field Mapping** screen. You can specify one or more skip months in a billing preference which may be continuous or non-continuous. However, you cannot skip all 12 months in a billing preference. The system derives the skip months for an account using the billing preference. You can set the billing preference for an account through a characteristic type which is specified in the **Bill Cycle Rule Code** option type of the **C1-ASOBLLNG** feature configuration. Note that you must specify a characteristic type where the characteristic entity is set to **Account** in the **Bill Cycle Rule Code** option type. You can define this characteristic for an account from the user interface or through a health care inbound message. You can view a list of accounts for which skip months are defined in the billing preference using the **Skip Months** field in the **360° Search** zone.

A new column named **DIS_AMT** is added to the **CI_PRCE_CALC** and **CI_PRCE_CALC_LN** tables. While calculating the membership premium using the age based or tier based pricing rule, the system checks whether the skip months are defined for the account. If the skip months are not defined for the account, the system stores the calculated premium in the **DIS_AMT** column.

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A new algorithm type named **C1-SKPMNTHPC** is introduced in this release. To setup the **9/10 billing** feature, you need to create an algorithm using the **C1-SKPMNTHPC** algorithm type and attach it to the **Skip Month Premium Calculation** system event of the required age based and tier based pricing rule types. The system invokes this algorithm in the **C1-REPC3** batch. This algorithm distributes the total premium in the non-skip months of the coverage period. In case of an age based pricing, the system calculates the distributed amount for each eligible member in the membership. And, in case of a tier based pricing, the system calculates the distributed amount for the membership. When a billable charge is created for a non-skip month through the **C1-FIBCR** batch, the distributed amount is stored through an SQI on the billable charge.

Repricing

Oracle Revenue Management and Billing extends the Repricing feature for the insurance domain. To enable this feature for fully-insured line of business, you need to setup the audit framework for membership and age based and tier based pricing rules. For more information, refer to the Audit Framework for Membership and Fully-Insured Pricing Rules section.

To recalculate the membership premium, you need to execute the following batches in the specified order:

1. **Identify Entities for Repricing (C1-REPC1)** - Until now, this batch identified a set of accounts which were impacted due to change in a price list and then created a repricing request for such accounts. In this release, new parameters named **Repricing Mode** and **Membership ID** are added in this batch. If the **Repricing Mode** parameter is set to **ACCT**, this batch identifies a set of accounts which were impacted due to change in a price list and then creates a repricing request for such account. However, if the **Repricing Mode** parameter is set to **MEMB**, this batch considers the records in the **Pending (P)** and **Error (E)** status from the CI_REPRC_ENTITY_DTL table. For each record, the system invokes the algorithms attached to the following system events of the pricing rule type in the specified order:

   a. **Bill Group Derivation** - Used to derives the policy, bill group, and parent customer of the bill group.
   b. **Account and Price Item Derivation** - Used to derive the pricing rules for the price items (which are present in the pricing rule type) on the policy plan (to which the membership belongs).

   Once the pricing rules are derived, the system creates a repricing request for the membership, pricing rule, and effective date combination. Finally, the status of the corresponding record is set to **Complete (C)** in the CI_REPRC_ENTITY_DTL table. If any error occurs while creating a repricing request, the status of the corresponding record is set to **Error (E)** in the CI_REPRC_ENTITY_DTL table.

   This batch is a multi-threaded batch. For more information about the batch, refer to *Oracle Revenue Management and Billing Batch Guide*.
2. **Process Repricing Request (C1-REPC2)** - Until now, this batch calculated and persisted the rate for the account, price item, and effective date combination in the CI_PRCE_CALC table. In this release, new parameters named **Repricing Mode** and **Membership ID** are added in this batch. If the **Repricing Mode** parameter is set to **ACCT**, this batch calculates and persist the rate for the account, price item, and effective date combination in the CI_PRCE_CALC table. However, if the **Repricing Mode** parameter is set to **MEMB**, this batch considers the records in the **Pending (P)** and **Error (E)** status from the CI_REPRC_REQ_DTL table. If the pricing rule in the record is **Age Based**, the system invokes the algorithms attached to the following system events of the pricing rule type in the specified order:

   a. **Pricing Rule Pre Processing** - Used to identify the eligible member persons for premium calculation.
   b. **Pricing Rule Premium Calculation** - Used to calculate the premium for the membership.

   Once these algorithms are executed, the premium is calculated for each eligible member person and stored in the CI_PRCE_CALC_LN table and the total premium for the membership is stored in the CI_PRCE_CALC table. Finally, the status of the corresponding record is set to **Complete (C)** in the CI_REPRC_REQ_DTL table.

   However, if the pricing rule in the record is **Tier Based**, the system invokes the algorithm attached to the following system event of the pricing rule type:

   - **Pricing Rule Premium Calculation** - Used to calculate the premium for the membership.

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Once the algorithm is executed, the premium is calculated for the membership and stored in the CI_PRCE_CALC table. Finally, the status of the corresponding record is set to **Complete (C)** in the CI_REPRC_REQ_DTL table.

This batch is a multi-threaded batch. For more information about the batch, refer to *Oracle Revenue Management and Billing Batch Guide*.

Related Topics

For more information on...	See...
Audit Framework for Fully-Insured Group Health Insurance Billing	Audit Framework for Fully-Insured Billing on page 3466
Bill Group Derivation for Membership	Bill Group Derivation for Membership on page 3489
Account and Price Item Derivation for Membership	Account and Price Item Derivation for Membership on page 3491
State of Issue	State of Issue on page 3483
Membership Premium Calculation	Membership Premium Calculation on page 3484
Fully-Insured Group Billable Charge Creation	Fully-Insured Billable Charge Creation on page 3496

Fully-Insured Billable Charge Creation

Oracle Revenue Management and Billing enables you to create billable charges for pre-calculated premium amount (which is received through a health care inbound message) and calculated premium amount (which is derived using a pricing rule defined at the policy plan level). Before creating an SQI based billable charge, the system derives the bill period for the account using the **Invoice Day (C1OFFRST)** characteristic defined on the account.

While creating a billable charge for the pre-calculated premium amount through a health care inbound message, the system creates an SQI based billable charge for the membership and price item combination. Note that if the bill period or frequency is given in the billable charge information in the health care inbound message, the system does not derive the bill period for the account.

However, for creating a billable charge for the calculated premium amount, you need to execute the **Fully-Insured Group Billable Charge Creation (C1-FIBCR)** batch. It creates an SQI based billable charge for calculated premium amount. It considers the timelines in the **Pending (P)** and **Error (E)** status from the **CI_PRCE_CALC** table. Note that it considers only those timelines where the entity type is set to **Membership**. For each timeline, membership and price item combination, the system does the following:

1. Derives the bill period for the account using the **Invoice Day (C1OFFRST)** characteristic defined on the account.
2. Creates an SQI based billable charge. Here, the start and end dates on the billable charge are set to the timeline start and end dates.

If the premium amount of the two consecutive timelines of a membership and price item combination is same, this algorithm does not create a new billable charge. Instead, it extends the end date of the previous timeline's billable charge. If the membership end date is set to a date which is earlier than the previous date (for example, Old Membership End Date: 31-12-2019 and New Membership End Date: 31-10-2019) and a billable charge exists for the membership and price item combination with the same start date and amount, then the system behaves in the following manner:

If...	Then...
Bill segments for the 01-01-2019 to 31-12-2019 period are not yet generated in the system	The end date in the existing billable charge is updated to 31-10-2019.

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If...	Then...
Bill segments for the 01-01-2019 to 31-12-2019 period are in the **Freezable** status	The bill segments for the 01-11-2019 to 31-12-2019 period are deleted and the end date in the existing billable charge is updated to 31-10-2019.
Bill segments for the 01-01-2019 to 31-12-2019 period are in the **Frozen** or **Pending Cancel** status	The bill segments for the 01-11-2019 to 31-12-2019 period are canceled and the end date in the existing billable charge is updated to 31-10-2019.

However, if the membership end date is set to a date which is earlier than the previous date (for example, Old Membership End Date: 31-12-2019 and New Membership End Date: 31-10-2019) and a billable charge exists for the membership and price item combination with the same start date, but different amount, then the system behaves in the following manner:

If...	Then...
Bill segments for the 01-01-2019 to 31-12-2019 period are not yet generated in the system	The existing billable charge is canceled and a new billable charge is created for the 01-01-2019 to 31-10-2019 period.
Bill segments for the 01-01-2019 to 31-12-2019 period are in the **Freezable** status	The bill segments for the 01-01-2019 to 31-12-2019 period are deleted. The existing billable charge is canceled and a new billable charge is created for the 01-01-2019 to 31-10-2019 period.
Bill segments for the 01-01-2019 to 31-12-2019 period are in the **Frozen** or**Pending Cancel** status	The bill segments for the 01-01-2019 to 31-12-2019 period are canceled. The existing billable charge is canceled and a new billable charge is created for the 01-01-2019 to 31-10-2019 period.

And, if the membership end date is set to a date which is earlier than the previous date (for example, Old Membership End Date: 31-12-2019 and New Membership End Date: 31-10-2019) and a billable charge does not exist for the membership and price item combination with the same start date, then a billable charge is created for the 01-01-2019 to 31-10-2019 period. Note that if there are billable charges for the membership and price item combination whose date range is within the timeline, such billable charges are canceled and their corresponding bill segments (if any) are either deleted or canceled in the system.

The pre-calculated or calculated premium amount is stored as a pass through line in the SQI based billable charge. Note that these pass through lines are memo only and no general ledger entries will be created for these pass through lines. This algorithm fetches SQI from the **Proration SQI** option type of the **C1-ASOBLLNG** feature configuration. The SQI value is set to the total amount of the pass through lines in the billable charge. The system prorates the amount when the SQ rule specified in the rate schedule attached to the active contract contains the SQI which is specified in the **Proration SQI** option type of the **C1-ASOBLLNG** feature configuration.

Once the billable charge is created, the membership ID is stamped as characteristic on the billable charge. This indicates that the billable charge is created for the respective membership. This algorithm fetches the characteristic type, which must be defined on the billable charge, from the **Characteristic Type For Membership Id** option type of the **C1-ASOBLLNG** feature configuration.

Finally, the status of the corresponding timeline is set to **Complete (C)** in the **CI_PRCE_CALC** table. If any error occurs while creating a billable charge, the status of the corresponding timeline is set to **Error (E)** in the **CI_PRCE_CALC** table. In addition, if an error occurs, a To Do is created using the **C1-FIBCR** To Do type and assigned to all users with a To Do role which is specified as characteristic on the parent customer. The system considers the characteristic on the parent customer which is specified in the **To Do Role Characteristic Type** option type of the **C1-ASOBLLNG** feature configuration. Note that the system does not create a To Do for each error record. Instead, the system creates distinct To Do for each membership and pricing rule combination.

This batch is a multi-threaded batch. For more information about the batch, refer to *Oracle Revenue Management and Billing Batch Guide*.

Related Topics

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For more information on...	See...
Audit Framework for Fully-Insured Group Health Insurance Billing	Audit Framework for Fully-Insured Billing on page 3466
Bill Group Derivation for Membership	Bill Group Derivation for Membership on page 3489
Account and Price Item Derivation for Membership	Account and Price Item Derivation for Membership on page 3491
State of Issue	State of Issue on page 3483
Membership Premium Calculation	Membership Premium Calculation on page 3484
Repricing	Repricing on page 3495

New Born Credit Waiver

Oracle Revenue Management and Billing enables you to waive off premium for a newborn while calculating the health insurance premium for the group and individual memberships. However, the newborn premium waiver benefit for the group and individual memberships was not recorded and maintained in ORMB for the General Ledger (GL) posting.

Now, the system calculates the premium for the newborn credit waiver period and stores the amount in the billable charge when a newborn member exists in the group and individual memberships and the newborn applicability for the membership is set to **Yes**. The system stamps two SQIs in the billable charge - one SQI stores the newborn premium (i.e. debit amount) and another SQI stores the newborn premium waiver benefit (i.e. credit amount). This mechanism ensures that the system records the newborn premium in the system, but at the same time does not charge the newborn premium for the membership. It helps to maintain GL entries for the newborn premium which is waived off during premium calculation. To enable this feature, you need to set the **New Born Waiver Credit Calculation** option type of the **C1-ASOBLLNG** feature configuration to **Y**.

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

- While deriving the eligible members for a membership, while deriving the member relationship for a member person, and while deriving the subscription tier for a membership, the system checks whether the **New Born Waiver Credit Calculation** option type is set to **Y** or **N**. If the **New Born Waiver Credit Calculation** option type is set to **Y**, the system derives the list of eligible members for the membership, member relationship for a member person, or subscription tier for the membership considering with and without newborn gift days.

  If you are using an age based pricing rule wherein the member relationship derivation algorithm is attached, the system will set the following characteristics for each member person in the membership:

  - **Member Relationship** - Stores the member relationship for the member person considering newborn gift days
  - **Member Role Without New Born Gift Days** - Stores the member relationship for the member person without considering newborn gift days

  However, if you are using a tier based pricing rule, the system will set the following characteristics for the membership:

  - **Subscription Tier** - Stores the subscription tier for the membership considering newborn gift days
  - **Subscription Tier without Gift Days** - Stores the subscription tier for the membership without considering newborn gift days
- While calculating premium for a membership, the system checks whether there is a newborn member person in the membership and whether the **New Born Gift Days Applicability** option is set to **Yes** for the membership. If so, the system checks whether the **New Born Waiver Credit Calculation** option type in the **C1-ASOBLLNG** feature configuration is set to **Y**. If so, the system calculates the newborn gift period start and end dates. While deriving the timeline during premium calculation, the system checks whether the timeline is within the newborn gift days period. If so, the system calculates the premium for the newborn and creates a record in the **CI_PRCE_CALC_LN** table where the **NEW_BORN_CMT_FLG** column is set to **Without Gift Days**. In addition, the system creates a reverse

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entry record in the **CI_PRCE_CALC_LN** table where the **NEW_BORN_CMT_FLG** column is set to **Reversal**. If the amount calculated with and without gift days do not match, the system stamps two SQIs in the billable charge - one SQI stores the newborn premium (i.e. debit amount) and another SQI stores the newborn premium waiver benefit (i.e. credit amount). The system considers the SQIs specified in the **New Born Waiver SQI** and **New Born Waiver Credit SQI** option types of the **C1-ASOBLLNG** feature configuration, respectively.

- During premium proration, the system stores the distributed amount for the newborn member person in an SQI which is specified in the **New Born Distributed SQI** option type of the **C1-ASOBLLNG** feature configuration.

Membership Benefit Billing

Once the repricing entity detail records are created for the membership benefits which are added or updated, you need to execute the following batches in the given sequence:

- Identify Entities for Repricing (C1-REPC1)
- Process Repricing Request (C1-REPC2)
- Fully Insured Billable Charge Creation (C1-FIBCR)

Before executing the above batches, you need to set the **Medicare** preference in the Medicare option type of the **C1-ASOBLLNG** feature configuration. This preference is used to derive the membership benefit pricing while creating charges for Medicare Part D LIS and Medicare Part D LEP. You can define a **Medicare** preference using the Medicare preference category through the **Field Mapping** screen. While defining a Medicare preference, you must set the following attributes in a Medicare preference:

- **Late Enrollment Penalty** - Used to indicate the benefit sub type for Medicare Part D LEP.
- **Low Income Subsidy** - Used to indicate the benefit sub type for Medicare Part D LIS.
- **Medicare Prescription Drug Coverage** - Used to indicate the benefit sub type for Medicare Part D.

For more information about the Medicare preference, refer to Medicare Preference on page 128

If the reverse charge is to be created for a membership benefit on the benefit sponsor account, the system does the following during the respective batch execution:

- **C1-REPC1** - This batch checks whether the benefit sponsor account or sponsor account derivation algorithm is specified in the benefit sub type. If the sponsor account derivation algorithm is specified in the benefit sub type, the **C1-REPC1** batch invokes the sponsor account derivation algorithm which derives the benefit sponsor account for the individual membership. It then creates two repricing requests - one for benefit price item and another for benefit sponsored price item.
- **C1-REPC2** - This batch derives the amount for the benefit repricing request and benefit sponsored repricing request from the **C1_BENEFITS** table.
- **C1-FIBCR** - This batch creates the billable charges for benefit price item as well as benefit sponsored price item. A characteristic is stamped on the benefit charge which is created using the benefit sponsored price item on the benefit sponsor account. This characteristic indicates that the benefit charge is a reverse charge on the benefit sponsor account. While defining the characteristic, the system fetches the characteristic type which is specified in the **Sponsored Switch Characteristic for Billable Charge** option type of the **C1-ASOBLLNG** feature configuration.

If the **Validate External Price** option is selected in the benefit sub type of a membership benefit, the system invokes the **C1-PRLBCVLD** algorithm which is attached to the **Billable Charge Creation Post-Processing** system event of the respective benefit pricing rule type. It is used to calculate the benefit charge using the validate price item and then compare it against the externally priced benefit charge. If there is a mismatch in the benefit start date, benefit end date, and benefit amount, the system creates a To Do using the given To Do type and then adds the To Do in the respective membership log. However, if the benefit start date and end dates match, but the benefit amount does not match, the system uses the threshold amount to determine whether the To Do should be created for the membership. If the calculated benefit amount is within the minimum amount (i.e. received benefit amount - threshold amount) and maximum amount (i.e. received benefit amount + threshold amount) range, the system will not create a To Do for the membership when there is mismatch in the calculated benefit amount (priced in ORMB) and received pre-calculated benefit amount (i.e. priced externally). However, if the calculated benefit amount is not within the minimum amount (i.e. received benefit

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amount - threshold amount) and maximum amount (i.e. received benefit amount + threshold amount) range, the system creates a To Do using the given To Do type and then adds the To Do in the respective membership log.

The **C1-PRLBCVLD** algorithm contains the following parameters:

- **To Do Type** - Used to indicate the To Do type using which you want to create a To Do. The **C1-PRBCV** To Do type is shipped with the product. This parameter is mandatory.
- **To Do Role** - Used to indicate that users with the specified To Do role must receive the To Do notification. This parameter is optional. If you do not specify this parameter, the system considers the default To Do role associated with the To Do type.
- **Threshold Amount** - Used to specify the threshold amount which is used to calculate the minimum and maximum amount range for benefit amount comparison. This parameter is mandatory.

You can view the benefit price item billable charges generated for a membership benefit from the **Billable Charges** zone of the **Contracts and Charges** tab in the **Membership** screen. Similarly, you can view the benefit sponsored price item billable charges (i.e. reverse charges which are created for a membership benefit on the benefit sponsor account) from the **Sponsor Billable Charges** zone of the **Contracts and Charges** tab in the **Membership** screen. In the **Sponsor Billable Charges** zone, the system displays the billable charges where the characteristic type specified in the **Sponsored Switch Characteristic for Billable Charge** option type of the **C1-ASOBLLNG** feature configuration is defined. Therefore, if you want to create a reverse charge for a membership benefit on the benefit sponsor account, it is mandatory to set the **Sponsored Switch Characteristic for Billable Charge** option type of the **C1-ASOBLLNG** feature configuration.

Additional Repricing Entity Detail Records

Until now, while creating repricing entity detail records for an audit event, the system used to create two repricing entity detail records for each membership and pricing rule type combination – one with the effective date as the membership start date and another with the effective date as the auditable element effective date. In addition, the system used to set the **Message_PARAM4** column to **Y** corresponding to the latter repricing entity detail record (with the effective date as the auditable element effective date) so that the system creates a repricing request only for the latter repricing entity detail record and not for the former repricing entity detail record.

A new option type named **Additional Repricing** is added in the **C1-ASOBLLNG** feature configuration. It enables the system to determine whether you want to create repricing entity detail records for all auditable elements (such as fields, business statuses, and characteristics) of the membership, member person, or person that are updated within the membership period. You can set the **Additional Repricing** option type to either of the following:

- **Y** – Used when you want to create repricing entity detail records for all auditable elements (such as fields, business statuses, and characteristics) of the membership, member person, or person that are updated within the membership period.
- **N** – Used when you want to create repricing entity detail records in the traditional manner (i.e. one with the effective date as the membership start date and another with the effective date as the auditable element effective date).

If you do not specify the value for this option type, the system, by default, sets it to **N**. Note that this option type is only applicable for the fully insured individual business.

Let us assume the following:

- M1 membership is effective from 01-Jan-2023 to 31-Dec-2023 on the HP1 health plan
- AGE_BASED1 and BENEFIT_1 pricing rule types are associated with the HP1 health plan
- The following auditable elements at the membership or member person level are already updated till 01-08-2023:

Element Name	Element Value	Modified On
benefitAmount	Field	10-Jan-2023
billLevel1	Field	20-Feb-2023
emailAddress	Field	22-Mar-2023

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Element Name	Element Value	Modified On
C1SMOKER	Characteristic	04-Apr-2023
C1TOBCC	Characteristic	05-May-2023
INACTVAL	Characteristic	01-Aug-2023

Now, if the **Additional Repricing** option type is set to **Y** and you update the **INACTVAL** characteristic of the M1 membership on 01-Aug-2023, the system will create the following repricing entity detail records for the audit event:

- M1, AGE_BASED1, 01-Jan-2023 (Message_PARAM4 = N)
- M1, BENEFIT_1, 01-Jan-2023 (Message_PARAM4 = N)
- M1, AGE_BASED1, 10-Jan-2023 (Message_PARAM4 = N)
- M1, BENEFIT_1, 10-Jan-2023 (Message_PARAM4 = N)
- M1, AGE_BASED1, 20-Feb-2023 (Message_PARAM4 = N)
- M1, BENEFIT_1, 20-Feb-2023 (Message_PARAM4 = N)
- M1, AGE_BASED1, 22-Mar-2023 (Message_PARAM4 = N)
- M1, BENEFIT_1, 22-Mar-2023 (Message_PARAM4 = N)
- M1, AGE_BASED1, 04-Apr-2023 (Message_PARAM4 = N)
- M1, BENEFIT_1, 04-Apr-2023 (Message_PARAM4 = N)
- M1, AGE_BASED1, 05-May-2023 (Message_PARAM4 = N)
- M1, BENEFIT_1, 05-May-2023 (Message_PARAM4 = N)
- M1, AGE_BASED1, 01-Aug-2023 (Message_PARAM4 = Y)
- M1, BENEFIT_1, 01-Aug-2023 (Message_PARAM4 = Y)

Note: The system will create repricing requests only for the repricing entity detail records where the **Message_PARAM4** column is set to **Y**.

Rounding Premium at the Member Level

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

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

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

- All the group and individual memberships would be auto renewed by the system based on the given renewal period.
- Two new option types are added in the **C1-ASOBLLNG** feature configuration:
  - **Number of months in advance for Open-Ended Renewal** - Used to indicate the number of months in advance you want to automatically renew the group and individual memberships. You must specify a positive value for this option type.
  - **Renewal period for Open-Ended Membership** – Used to indicate the period (i.e. number of months) for which you want to automatically renew the group and individual memberships. You must specify a positive value for

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this option type. The system will then set the end date of the group memberships to the policy start date + renewal period – number of months in advance for open-ended renewal. Similarly, the system will then set the end date of the individual memberships to the membership start date + renewal period – number of months in advance for open-ended renewal.

- A new column named **ENRL_END_DT** is introduced in the **CI_MEMBERSHIP**, **CI_MEMBERSHIP_PER**, and **C1_BENEFITS** tables.
- A new column named **OPEN_ENDED_SW** is introduced in the **CI_MEMBERSHIP_PROCESS** table.
- The **enrlEndDate** tag is added for membership and membership person in the **C1-Membership** business object schema.
- The **autoRenew** and **contractPeriod** tags are added for membership in the **C1-Membership** business object schema.
- The **enrlEndDate** tag is added for membership and membership person in the **C1-IndMembership** business object schema.
- The **enrlEndDate** tag is added for benefit in the **C1-Benefits** business object schema.
- A new parameter named **Open Ended Membership** is added in the **C1-MEPRC** batch. It is optional. It is used when you want to process only open-ended memberships and automatically renew them for the given renewal period.

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

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

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

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

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

Hold Repricing

Until now, the system calculated the premium and benefit (if applicable) charges immediately through the **Repricing** feature whenever an individual membership is added, updated, canceled, terminated, or reinstated in ORMB. In the individual health insurance business, there might be situations wherein approved premium rates are not available for the future enrollment period, frequent updates are received for the memberships, or the data flow is delayed due to some maintenance activity in the source system. In all such situations, you may want to hold the repricing for the membership for a particular period.

Oracle Revenue Management and Billing enables you to capture the repricing after date for a membership. This helps you to hold the repricing for the membership until the specified date. Note that the hold repricing feature is offered and certified only for the fully insured individual business and not for the fully insured group business. To implement the hold repricing feature, the following changes are made in the system:

- A new field named **REPRC_AFTER_DT** is added in the **CI_MEMBERSHIP** table.

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- A new tag named **repriceAfterDate** is introduced in the **C1-IndMembership** and **C1-HCInboundMessage** business object schema.
- A new tag named **repriceAfterDate** is introduced in the **C1-MembershipRepricing** business service schema.
- The **C1-HCINPROC** and **C1-INVRDTCIM** algorithm types are enhanced to support the hold repricing feature.

You can specify the repricing after date for an individual membership only through a health care inbound message or through the membership repricing inbound web service and not from the user interface (i.e. through the **Membership** screen). The **repriceAfterDate** tag is not mandatory. If the value for the **repriceAfterDate** tag is received while creating an individual membership, the system checks whether the repricing after date of the individual membership is earlier than the inbound message processing date. If so, the system throws an appropriate message indicating that the repricing after date of the individual membership cannot be earlier than the inbound message processing date. However, if the repricing after date of an individual membership is equal to or later than the inbound message processing date, the system checks whether the repricing after date of an individual membership is later than the membership end date. If so, the system throws an appropriate message indicating that the repricing after date of the individual membership cannot be later than the membership end date. However, if the repricing after date of an individual membership is earlier than the membership end date, the system adds the individual membership to the health plan. The repricing after date (if any) is then shown in the **Main** section of the **Membership** screen. In addition, a log entry is created for the individual membership indicating that the repricing for the membership is on hold till a particular date. You can view the log entry in the **Log** tab of the **Membership** screen.

If the value for the **repriceAfterDate** tag is received while updating a membership, the system checks whether the repricing after date of the individual membership is earlier than the inbound message processing date. If so, the system throws an appropriate message indicating that the repricing after date of the individual membership cannot be earlier than the inbound message processing date. However, if the repricing after date of an individual membership is equal to or later than the inbound message processing date, the system checks the status of the individual membership. If the status of the individual membership is not set to **Canceled**, the system checks whether there is any invoice request created for the respective account in the non-final status (i.e. in a status other than **Processed** or **Canceled**). If so, the system checks whether the repricing after date is later than the invoice request processing date. If so, the system sets the invoice request processing date to repricing after date + 1. In addition, a log entry is created for the invoice request indicating that the invoice request is on hold till a particular date. You can view the log entry in the **Log** tab of the **Invoice Request** screen.

However, if the repricing after date is earlier than or equal to the invoice request processing date, the system does not override the invoice request processing date.

On executing the **C1-REPC1** batch, the system considers the repricing after date specified for the individual membership while processing the respective repricing entity detail records. If the repricing after date is equal to or later than the batch business date, the system considers only those repricing entity detail records of the individual membership where the category of the pricing rule types is set to **Benefit** and accordingly creates the repricing requests for the benefit specific price items. Only when the repricing after date is earlier than the batch business date, the system considers all the repricing entity detail records of the respective individual membership which are in the **Pending** status and accordingly creates a repricing request for each individual membership, pricing rule, and effective date combination.

Prorate Membership Benefit and Corresponding Sponsor Charges

Until now, the system prorated the group and individual membership premium charges when the membership was enrolled or terminated in middle of the billing cycle. For the fully insured group business, the system prorated the membership premium using the proration rules defined on the fully insured policy plan. However, for the fully insured individual business, the system prorated the membership premium using the daily proration mechanism.

Now, Oracle Revenue Management and Billing also enables you to prorate the membership benefit charges on the eligible account and their corresponding benefit sponsor charges on the sponsor account. For the fully insured group business, the system allows you to prorate the membership premium benefit charges using the proration rules defined on the fully insured policy plan and prorate the membership non-premium benefit charges using the daily proration mechanism. A new option named **Premium Benefit** is introduced while defining and editing a benefit sub type. If the **Premium Benefit** option is selected in a benefit sub type, the system will consider the benefits created using the benefit

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sub type as the membership premium benefits and will prorate the membership premium benefits (if required) using the proration rules defined on the fully insured policy plan. Note that if the proration rules are not defined on the fully insured policy plan, the system will prorate the membership premium benefits using the daily proration mechanism.

However, if the **Premium Benefit** option is not selected in a benefit sub type, the system will consider the benefits created using the benefit sub type as the membership non-premium benefits and will prorate the membership non-premium benefits (if required) using the daily proration mechanism. While defining a benefit sub type, by default, the **Premium Benefit** option is not selected. If you select the **Premium Benefit** option, then the **Charge Benefit Sponsor** option is removed from the user interface. This is because the group membership premium benefits are not sponsored by a health insurance exchange. If the **Premium Benefit** option is not selected and the **Charge Benefit Sponsor** option is selected, the system will prorate the benefit sponsor charges using the daily proration mechanism.

For the fully insured individual business, the system will prorate the membership benefit charges and their corresponding benefit sponsor changers using the daily proration mechanism.

Note:

The **Premium Benefit** option in the **Benefit Sub Type** screen is applicable only for the fully insured group business.

The end date of benefit should be sent through a health care inbound message or through a membership repricing request whenever the group or individual membership is terminated.

The system decides whether to prorate the membership premium or non-premium benefit charges of a price item using the **Proration Required** option defined corresponding to the price item in the respective benefit pricing rule type. If the **Proration Required** option is selected corresponding to a price item, the system will prorate the charges of the respective price item whenever required during membership enrolment or termination. However, if the **Proration Required** option is not selected corresponding to a price item, the system will not prorate the charges of the respective price item during membership enrolment or termination.

Note that if you select the **Proration Required** option corresponding to any price item in a benefit pricing rule type, you need to attach an algorithm created using the **C1-BNFTPRCF** algorithm type to the **Pricing Rule Proration Amount Calculation** system event of the benefit pricing rule type.

Zero-Amount Membership Benefit Charges

Oracle Revenue Management and Billing enables you to receive the full or partial snapshot of benefit charges for a group or individual membership through a health care inbound message or through a membership repricing request. A new option type named **Benefit Full Snapshot Upload** is introduced in the **C1-ASOBLLNG** feature configuration. It enables the system to determine whether the full or partial snapshot of benefit charges is received for a group or individual membership through a health care inbound message or through a membership repricing request. You can set the **Benefit Full Snapshot Upload** option type to **Y** or **N**. If you set the **Benefit Full Snapshot Upload** option type to **Y**, the system behaves in the following manner in the respective scenarios:

Scenario	**Existing Benefit Data**			**New Snapshot (Received through an Inbound Message)**			**Comments**
	Benefit Record	**Benefit Coverage**	**Benefit Amount**	**Benefit Record**	**Benefit Coverage**	**Benefit Amount**	
S1	B1	Jan – Mar	100	B1	Jan – Mar	90	The system will update the B1 (Jan-Mar), B2 (Apr-Jun), and B3 (Jul-Dec) benefit records of the membership.
	B2	Apr – Jun	100	B2	Apr – Jun	110	
	B3	Jul – Dec	200	B3	Jul – Dec	120	
S2	B1	Jan – Mar	50	B1	Jan – Mar	50	The system will update the B1 (Jan-Mar) and B3 (Jul-Dec) benefit records of the membership. In addition, it
	B2	Apr – Jun	90	B3	Jul – Dec	120	

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Scenario	Existing Benefit Data			New Snapshot (Received through an Inbound Message)			Comments
	Benefit Record	**Benefit Coverage**	**Benefit Amount**	**Benefit Record**	**Benefit Coverage**	**Benefit Amount**	
	B3	Jul – Dec	150				will change the status of the B2 (Apr-Jun) benefit record to **Inactive**.
S3	B1	Jan – Mar	100	B1	Jan – Mar	100	The system will update the B1 (Jan-Mar), B2 (Apr-Jun), and B3 (Jul-Dec) benefit records of the membership.
	B2	Apr – Jun	100	B2	Apr – Jun	0	
	B3	Jul – Dec	200	B3	Jul – Dec	200	
S4	B1	Jan – Mar	100	B11	Jan – Feb	90	The system will update the B3 (Jul-Dec) benefit record of the membership. However, the system will change the status of B1 (Jan-Mar) and B2 (Apr-Jun) benefit records to **Inactive** and will create two new benefit records – B11 (Jan-Feb) and B12 (Mar-Jun) with the **Active** status.
	B2	Apr – Jun	100	B12	Mar – Jun	110	
	B3	Jul – Dec	200	B3	Jul – Dec	120	

Note: If you set the **Benefit Full Snapshot Upload** option type to **Y**, the system will update the existing benefit records when the benefit coverage period matches.

However, if you set the **Benefit Full Snapshot Upload** option type to **N**, the system behaves in the following manner in the respective scenarios:

Scenario	Existing Benefit Data			New Snapshot (Received through an Inbound Message)			Comments
	Benefit Record	**Benefit Coverage**	**Benefit Amount**	**Benefit Record**	**Benefit Coverage**	**Benefit Amount**	
S1	B1	Jan – Mar	100	B1	Jan – Mar	90	The system will change the status of the B1 (Jan-Mar), B2 (Apr-Jun), and B3 (Jul-Dec) benefit records to **Inactive**. The system will then create three new benefit records - B1 (Jan-Mar), B2 (Apr-Jun), and B3 (Jul-Dec) with the **Active** status.
	B2	Apr – Jun	100	B2	Apr – Jun	110	
	B3	Jul – Dec	200	B3	Jul – Dec	120	
S2	B1	Jan – Mar	100	B1	Jan - Dec	300	The system will change the status of the B1 (Jan-Mar), B2 (Apr-Jun), and B3 (Jul-Dec) benefit records to **Inactive**. The system will then create one new benefit record – B1
	B2	Apr – Jun	100				
	B3	Jul – Dec	200				

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Scenario	Existing Benefit Data			New Snapshot (Received through an Inbound Message)			Comments
	Benefit Record	**Benefit Coverage**	**Benefit Amount**	**Benefit Record**	**Benefit Coverage**	**Benefit Amount**	
							(Jan-Dec) with the **Active** status.
S2	B1	Jan – Mar	100	B1	Jan - Jun	300	The system will change the status of the B1 (Jan-Mar), B2 (Apr-Jun), and B3 (Jul-Dec) benefit records to **Inactive**. The system will then create two new benefit records – B1 (Jan-Jun) and B2 (Jul-Dec) with the **Active** status.
	B2	Apr – Jun	100	B2	Jul-Dec	0	
	B3	Jul – Dec	200				

Note: If you set the **Benefit Full Snapshot Upload** option type to **N**, the system will always inactivate all the existing benefit records of the membership and will create the new benefit records for the membership in the **Active** status.

A new option type named **Zero Dollar Benefit Charge** is introduced in the **C1-ASOBLLNG** feature configuration. It enables the system to determine whether the billable charge for zero benefit amount should be created or not. You can set the **Zero Dollar Benefit Charge** option type to **Y** or **N**. If you set the **Zero Dollar Benefit Charge** option type to **Y**, the system will create a zero-amount benefit charge for the membership. However, if you set the **Zero Dollar Benefit Charge** option type to **N**, the system will not create a zero-amount benefit charge for the membership.

Benefit Passthrough Charges vs. Calculated Charges

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

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

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

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

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

If the repricing entity detail record is created for the primary pricing rule type (used for calculating membership premium) and the repricing entity detail record does not exist for the benefit pricing rule type with the same effective date, then the **C1-BNFTENTY** algorithm creates the repricing entity detail record for the benefit pricing rule type,

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

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

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

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

Repricing Request

The **Repricing Request** screen enables you to search for a repricing entity detail record using various search criteria. It contains the following zones:

- Search Repricing Entity Detail Record on page 3507
- Repricing Requests on page 3509
- Timeline and Billable Charge Details on page 3511
- Pricing Calculation Details on page 3511

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

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

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

Search Repricing Entity Detail Record

The **Search Repricing Entity Detail Record** zone enables you to search for repricing entity detail records which are:

- Created for a particular audit event
- Created for all audit events of a particular membership

It contains the following sections:

- **Search Criteria** - The **Search Criteria** section contains the following fields:

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Field Name	Field Description	Mandatory (Yes or No)
Search By	Used to indicate whether you want to search for a repricing entity detail record using the membership details. The valid value is: • Membership **Note:** By default, the **Membership** option is selected.	Yes
Created From	Used to search repricing entity detail records which are created for a membership from a particular date.	No
From Effective Date	Used to search repricing entity detail records which are effective from a particular date onwards.	No
Created To	Used to search repricing entity detail records for a membership which are created till a particular date.	No
To Effective Date	Used to search repricing entity detail records which are effective till a particular date.	No
Audit Event ID	Used to search repricing entity detail records of a particular audit event.	Yes (Conditional) **Note:** This field is required when you want to search for a repricing entity detail records using the audit event details.
Status	Used to search repricing entity detail records with a particular status. The valid values are: • Completed • Error • Invalid • Pending	No
Membership ID	Used to search repricing entity detail records of a particular membership. **Note:** The **Search** ( ) icon appears corresponding to this field. On clicking the **Search** icon, the **Membership Search** window appears.	Yes (Conditional) **Note:** This field is required when you want to search for a repricing entity detail records using the membership details.
Pricing Rule Type	Used to search repricing entity detail records which are created using a particular type of pricing rule.	No

Note: You must specify at least one search criterion while searching for a price list.

- **Search Results** - On clicking the **Search** button, a list of repricing request detail records appear based on the specified search criteria. The **Search Results** section contains the following columns:

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Column Name	Column Description
Membership Information	Displays information about the membership. **Note:** It has a link. On clicking the link, the **Membership** screen appears where you can view the details of the respective membership.
Creation Date Time	Displays the date and time when the repricing entity detail record is created in the system.
Effective Date	Displays the date from when the repricing entity detail record is effective for the membership.
Pricing Rule Type	Displays the pricing rule type using which the pricing is defined for the entity. **Note:** It has a link. On clicking the link, the **Pricing Rule Type** screen appears where you can view the details of the respective pricing rule type.
Status	Displays the status of the reprising entity detail record. The valid values are: • Completed • Error • Invalid • Pending
Error Message	Displays the error message if any error occurs when the audit event is created for the membership. **Note:** The status of the corresponding membership is set to **Error**.
Pre processing Request ID	Displays the pre processing request Id.

Note: Pagination is used to display limited number of records in the **Search Results** section. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

By default, the **Filter** area is visible. You can hide the **Filter** area by clicking the **Filters** ( ) icon in the upper right corner of this zone. You can also hide the **Filter** area by clicking the **Hide Filters** button in the lower left corner of this zone.

On clicking the **Broadcast** ( ) icon corresponding to the **Membership Information** field, the **Repricing Requests** zone appears where you can view a list of repricing requests created for a specific repricing entity detail record.

Related Topics

For more information on...	See...
Repricing Request screen	Repricing Request on page 3507
Repricing Requests zone	Repricing Requests on page 3509

Repricing Requests

The **Repricing Requests** zone allows you to view the repricing requests which are created for a particular repricing entity detail record. It contains the following columns:

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Column Name	Column Description
Pricing Rule Information	Displays information about the pricing rule using which the repricing request is created for the price item. **Note:** It has a link. On clicking the link, the **Pricing Rule** screen appears where you can view the details of the respective pricing rule.
Price Item Information	Displays information about the price item for which the repricing request is created in the system. **Note:** It has a link. On clicking the link, the **Price Item** screen appears where you can view the details of the respective price item.
Account Information	Displays the concatenated string consisting of account information which are separated by a comma (,). **Note:** It has a link. On clicking the link, the **Account** screen appears where you can view the details of the respective account.
Status	Displays the status of the repricing request. The valid values are: • Completed • Error • Invalid • Pending
Creation Date Time	Displays the date and time when the repricing request was created in the system.
Effective Date	Displays the date from when the reprising is effective for the price item.
Error Message	Displays the error message if any error occurs when the repricing entity detail record is created for the membership.
Request Reference Id	Displays the repricing request reference Id.

Note: Pagination is used to display limited number of records in this zone. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

By default, the **Repricing Requests** zone does not appear in the **Repricing Request** screen. It appears when you click the **Broadcast** (ᯤ) icon corresponding to a repricing entity detail record in the **Search Repricing Entity Detail Record** zone.

You can filter the list using various search criteria (such as, **Created From**, **From Effective Date**, **Created To**, **To Effective Date**, **Account ID**, **Status**, and **Pricing Rule**) available in the **Filter** area. By default, the **Filter** area is hidden. You can view the **Filter** area by clicking the **Filters** (▽) icon in the upper right corner of this zone.

On clicking the **Broadcast** (ᯤ) icon corresponding to a particular repricing request, the **Timeline and Billable Charge Details** zone appears where you can view a list of timeline and billable charge details created for a specific repricing request.

Related Topics

For more information on...	See...
How to view the repricing requests created for a repricing entity detail record	Viewing the Repricing Requests Created for a Repricing Entity Detail Record on page 3513

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Timeline and Billable Charge Details

The **Timeline and Billable Charge Details** zone enables you to view the timelines and billable charges generated for a repricing request. It contains the following columns:

Column Name	Column Description
Start Date	Displays the start date of the timeline.
End Date	Displays the end date of the timeline.
Amount	Displays the premium amount calculated for the timeline.
Billable Charge Information	Displays information about the billable charge for the timeline.
	Note: It has a link. On clicking the link, the **Billable Charge ID** screen appears where you can view the details of the respective billable charge.
Status	Displays the status of the timeline and billable charge details.
Error Message	Displays the error message if any error occurs when the repricing request is created for the price item in the system.

Note: Pagination is used to display limited number of records in this zone. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

By default, the **Timeline and Billable Charge Details** zone does not appear in the **Repricing Request** screen. It appears when you click the **Broadcast** (📡) icon corresponding to a repricing request in the **Repricing Requests** zone.

You can filter the list using various search criteria (such as, **Start Date**, **Billable Charge ID**, **End Date**, and **Status**) available in the **Filter** area. By default, the **Filter** area is hidden. You can view the **Filter** area by clicking the **Filters** (▽) icon in the upper right corner of this zone.

On clicking the **Broadcast** (📡) icon corresponding to a timeline, the **Pricing Calculation Details** zone appears where you can view a list of pricing details of the entity.

Related Topics

For more information on...	See...
How to view the billable charge timeline details of a repricing request	Viewing the Billable Charge Timeline Details of a Repricing Request on page 3513

Pricing Calculation Details

The **Pricing Calculation Details** zone enables you to view how the premium is calculated for the membership (in case of tier-based pricing) and how the premium is calculated for each eligible member in the membership (in case of age-based pricing). It contains the following columns:

Column Name	Column Description
Entity Information	If the age based pricing is used during the membership premium calculation, this column indicates the eligible member for whom the premium amount is calculated. However, if the tier based pricing is used during the membership premium calculation, this column indicates the main subscriber of the membership.

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Column Name	Column Description
Description on Bill	Displays the description of the rate component for which the price component is created in the age based or tier based pricing.
Pricing Parameter	Indicates the pricing eligibility criteria which is satisfied while deriving the base fee.
Amount	Displays the base fee or applicable modifier fee.
Total Amount	If the age based pricing is used during the membership premium calculation, this column displays the sum total of the base fee and modifier fee (if any) for the eligible member. However, if the tier based pricing is used during the membership premium calculation, this column displays the base fee applicable for the membership.

By default, the **Pricing Calculation Details** zone does not appear in the **Repricing Request** screen. It appears when you click the **Broadcast** (📡) icon corresponding to a **Billable Charge Information** field in the **Timeline and Billable Charge Details** zone.

Related Topics

For more information on...	See...
How to view the pricing calculation details of a timeline	Viewing the Pricing Calculation Details of a Timeline on page 3513

Searching for a Repricing Entity Detail Record

Prerequisites

To search for a repricing entity detail record, you should have:

- Repricing entity detail records created in the system.

Procedure

To search for a repricing entity detail record:

1. Click the **Menu** link in the **Application** toolbar.
   A list appears.
2. From the **Main** menu, select **Pricing Management** and then click **Repricing Request**.
   The **Repricing Request** screen appears.
3. Enter the search criteria in the **Search Repricing Entity Detail Record** zone.
4. Click **Search**.
   A list of repricing entity detail records that meets the search criteria appears in the **Search Results** section.

> **Note:** Pagination is used to display limited number of records in the **Search Results** section. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

Related Topics

For more information on...	See...
Repricing Request screen	Repricing Request on page 3507
Search Repricing Entity Detail Record zone	Search Repricing Entity Detail Record on page 3507

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Viewing the Repricing Requests Created for a Repricing Entity Detail Record

Procedure

To view the repricing requests created for a repricing entity detail record:

1. Search for the repricing entity detail record in the **Repricing Request** screen.
2. In the **Search Results** section, click the **Broadcast** (ᯤ) icon corresponding to the repricing entity detail record whose repricing request details you want to view.
   The **Repricing Requests** zone appears.
3. View the repricing requests created for the repricing entity detail record in the **Repricing Requests** zone.

Related Topics

For more information on...	**See...**
How to search for a repricing entity detail record	Searching for a Repricing Entity Detail Record on page 3512
Repricing Request screen	Repricing Request on page 3507
Repricing Requests zone	Repricing Requests on page 3509

Viewing the Billable Charge Timeline Details of a Repricing Request

Procedure

To view the billable charge timeline details of a repricing request:

1. Search for the repricing entity detail record in the **Repricing Request** screen.
2. In the **Search Results** section, click the **Broadcast** (ᯤ) icon corresponding to the repricing entity detail record whose repricing request details you want to view.
   The **Repricing Requests** zone appears.
3. In the **Repricing Requests** zone, click the **Broadcast** (ᯤ) icon corresponding to the repricing request whose billable charge timeline details you want to view.
   The **Timeline and Billable Charge Details** zone appears.
4. View the billable charge timeline details of a repricing request in the **Timeline and Billable Charge Details** zone.

Related Topics

For more information on...	**See...**
How to search for a repricing entity detail record	Searching for a Repricing Entity Detail Record on page 3512
Repricing Request screen	Repricing Request on page 3507
Repricing Requests zone	Repricing Requests on page 3509
Timeline and Billable Charge Details zone	Timeline and Billable Charge Details on page 3511

Viewing the Pricing Calculation Details of a Timeline

Procedure

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To view the pricing calculation details of a timeline:

1. Search for the repricing entity detail record in the **Repricing Request** screen.
2. In the **Search Results** section, click the **Broadcast** (📡) icon corresponding to the repricing entity detail record whose repricing request details you want to view.
   The **Repricing Requests** zone appears.
3. In the **Repricing Requests** zone, click the **Broadcast** (📡) icon corresponding to the repricing request whose billable charge timeline details you want to view.
   The **Timeline and Billable Charge Details** zone appears.
4. In the **Timeline and Billable Charge Details** zone, click the **Broadcast** (📡) icon corresponding to the timeline whose pricing calculation details you want to view.
   The **Pricing Calculation Details** zone appears.
5. View the pricing calculation details of a timeline in the **Pricing Calculation Details** zone.

Related Topics

For more information on...	See...
How to search for a repricing entity detail record	Searching for a Repricing Entity Detail Record on page 3512
Repricing Request screen	Repricing Request on page 3507
Repricing Requests zone	Repricing Requests on page 3509
Timeline and Billable Charge Details zone	Timeline and Billable Charge Details on page 3511
Pricing Calculation Details zone	Pricing Calculation Details on page 3511

Membership Premium Calculation Through Inbound Web Service

Oracle Revenue Management and Billing enables you to calculate membership premium through an inbound web service. The following business service is shipped with the product to support the premium calculation operations:

Business Service	Description
C1-MembershipRepricing	Used to create, update, simulate, and trigger membership repricing. For more information, see C1-MembershipRepricing Business Service on page 3514

If you want to send the request in the XML format, you can create a SOAP based inbound web service. For more information on how to setup the **Membership Premium Calculation Through Inbound Web Service** feature, see Prerequisites.

C1-MembershipRepricing Business Service

Oracle Revenue Management and Billing enables you to do the following through the **C1-MembershipRepricing** business service:

- Define and edit the following types of membership:
  - Active Employee Coverage Membership
  - Employer Sponsored Group Medicare Membership (800 Series Plans)
  - COBRA Membership
- Add a member person to the membership

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- Edit the existing member person details of the membership
- Create a person whom you want to add to the membership
- Edit the details of a person who is added to the membership
- Define and edit a benefit of a member person in a medicare membership

> **Note:** While editing a benefit of a member person, the system inactivates the old record and creates a new record in the system. The status of the old benefit record is set to **Inactive** and the status of the new benefit record is set to **Active**.

- Recalculate the membership premium (i.e. trigger repricing) in the following scenarios:
  - A membership is added or edited in the policy or health plan.
  - A member person is added to the membership.
  - The fields, characteristics, or statuses which are monitored for the auditing purposes are updated at the membership or member person level.
- Recalculate the membership premium in the simulation mode and not in real time

> **Note:** You can use the simulation mode as the What-If Analysis tool. In the simulation mode, you can evaluate the membership premium when a new membership will be added or the existing membership will be updated. However, in the simulation mode, the system neither adds or edits the membership in the system nor creates the billable charge for the membership premium. It only recalculates the membership premium and sends the premium calculation details in the response. Note that membership premium recalculation happens only in the above three listed scenarios.

- View the information of the memberships whose start and end dates fall within the specified date range. The information includes:
  - Details of the membership
  - Details of each member person in the membership
  - Benefit details of a member person in a medicare membership
  - Details of the billable charges created for the membership premium for different price items
  - Pricing rule and price assignment used during the membership premium billable charge creation
  - Account for which the membership premium billable charge is created
  - How premium is calculated for each timeline of the billable charge

> **Note:**
>
> If the age based pricing is used during the membership premium calculation, the premium is calculated for each eligible member of the membership. Here, the premium amount is the sum of the base fee and modifier fee (if any) for the eligible member.
>
> However, if the tier based pricing is used during the membership premium calculation, the premium is calculated at the membership level. Here, the premium amount is the base fee applicable for the membership.
>
> You can also filter the list of membership premium billable charges by specifying price items whose billable charges you want to view.

- View the last billed amount and current balance of the account on which the membership premium is billed.

You can define or edit only one membership at a time through the **C1-MembershipRepricing** business service. You can only create or edit a member person and not a bill group or parent customer through the **C1-MembershipRepricing** business service.

We have shipped a SOAP based inbound web service named **C1-MembershipRepricing** with the product. You can send the membership repricing request from the external system in the XML format through the **C1-MembershipRepricing** inbound web service. If you want to send the request in the XML and/or JSON format, you need to create a REST based inbound web service.

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C1-MembershipRepricing Business Service Schema

The following code snippet illustrates how the tags are nested in the membership repricing inbound web service schema:

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Membership Repricing Request and Response - Tags in XML Format

Note: We recommend you to refer the **C1-MembershipRepricing** inbound web service schema in parallel while understanding the below mentioned tags. This will help you to understand how the tags are nested in the schema.

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Before calling the **C1-MembershipRepricing** inbound web service, you need to ensure that the membership repricing service contains the following tags:

Tag Name	Tag Description	Mandatory (Yes or No)
schema	Used to specify the tags of a membership repricing inbound web service.	Yes

simulationSw	Used to specify whether the simulation switch should be set as enabled or disabled in the membership repricing web service based on the following conditions:
	• If the simulation switch is set as **Y**, then the system behaves in the following manner:
	  • Any changes made to the entities like membership, member-person, and billable-charges are not saved in the ORMB application.
	  • The billable charge event is not triggered in the ORMB application, and hence the **Billable Charge** tag is not displayed in the response received from the membership repricing inbound web service.
	• If the simulation switch is set as **N**, then the system behaves in the following manner:
	  • The billable charge event is triggered in the ORMB application, and the **Billable Charge** tag is displayed in the response received from the membership repricing inbound web service.
	Note: If you do not specify the value for the simulation switch, by default, it is set to **N**.
		Yes

action	Used to indicate the execution mode of the membership repricing inbound web service when you want to receive the existing premium calculations in response. **Note:** If you specify the value for the action flag as **READ** the system retrieves the membership, pricing, and billable charge details for the membership. The membership information is not updated even if the simulation switch is set to **N** and the action flag is set as **READ**.	Yes (Conditional) **Note:** This data is required when you want to receive the existing premium calculations in the response from the membership repricing inbound web service.
readFilters	Used to specify the filter when you want to view the premium calculations for a particular set of price-items or for a timeline. **Note:** The execution mode of the membership inbound web service should be set to**read-only**.	Yes (Conditional) **Note:** This data is required while viewing the premium calculations for particular set of price-items or for a timeline.
dateFilter	Used to specify the filter when you want to view the premium calculations for a timeline.	Yes (Conditional)

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Tag Name	Tag Description	Mandatory (Yes or No)
	Note: The execution mode of the membership inbound web service should be set to**read-only**.	**Note:** This data is required while viewing the premium calculations for a particular timeline.
startDate	You can use this tag within the following tags: • **dateFilter** - Here, the **startDate** tag is used to indicate the date from when the timeline is effective for premium calculations. **Note:** The start date cannot be later than the end date. The start date cannot be earlier than the membership start date or later than the membership end date. • **related persons** - Here, the **startDate** tag is used to specify the date from when the person is related to the parent customer. • **membership** - Here, the **startDate** tag is used to indicate the date from when the membership is effective. • **benefitDataList** - Here, the **startDate** tag is used to indicate the date from when the benefit is effective.	Yes (Conditional) **Note:** This data is required while viewing the premium calculations for a particular timeline.
endDate	You can use this tag within the following tags: • **dateFilter** - Here, the **endDate** tag is used to specify the date till when the timeline is effective for premium calculations. **Note:** The end date cannot be earlier than the start date. The end date cannot be earlier than the membership start date or later than the membership end date. • **related persons** - Here, the **endDate** tag is used to specify the date till when the person is related to the parent customer. • **membership** - Here, the **endDate** tag is used to indicate the date till when the membership is effective. • **benefitDataList** - Here, the **endDate** tag is used to indicate the date till when the benefit is effective.	Yes (Conditional) **Note:** This data is required while viewing the premium calculations for a particular timeline.
priceItemFilter	Used to specify the filter when you want to view the premium calculations for a particular set of timeline. **Note:** The execution mode of the membership inbound web service should be set to**read-only**.	Yes (Conditional) **Note:** This data is required while viewing the premium calculations for a particular set of price-items.
priceItemList	Used to specify the price items in the pricing list.	No
priceItemCode	Used to specify the price item code.	No

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Tag Name	Tag Description	Mandatory (Yes or No)
person	Used to specify information about the person.	Yes
personData	Used to specify the details of the parent customer, bill group, or member person.	Yes (Conditional) **Note:** This data is required while defining or editing a person.
sequence	You can use this tag within the following tags: • **personData** - Here, the **sequence** tag is used to indicate the order in which the person information should be created in the system. **Note:** You must specify the data in this field even though the information for a single person exists. • **personName** - Here, the **sequence** tag is used to indicate the order in which the person name should be created in the system. **Note:** You must specify the data in this field only when the information for multiple persons exists. • **benefitDataList** - Here, the **sequence** tag is used to indicate the order in which the benefit information should be created in the system.	Yes (Conditional) **Note:** This data is required while defining or editing a person.
personType	Used to indicate the type of person. The valid values are: • **B** - Indicates that the person is a business owner. • **BG** - Indicates that the person is a bill group. • **G** - Indicates that the person is a group owner. • **K** - Indicates that the person is a broker. • **P** - Indicates that the person is an individual • **PG** - Indicates that the person is a parent customer. **Note:** You must specify a value which is already defined in the **PER_OR_BUS_FLG** lookup field. It must be in the **Active** status.	Yes (Conditional) **Note:** This data is required while defining or editing a person.
personName	Used to specify a list of names for the person.	Yes (Conditional) **Note:** This data is required while defining or editing a person.
entityName	Used to specify the name of the person.	Yes (Conditional) **Note:** This data is required while defining or editing a person.
nameType	Used to indicate the type of name. The valid values are: • **AL** - Indicates that the type of name is Alias.	Yes (Conditional)

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Tag Name	Tag Description	Mandatory (Yes or No)
	• **ALT** - Indicates that the type of name is Alternate Representation. • **DBA** - Indicates that the type of name is Doing Business As. • **FORM** - Indicates that the type of name is Former. • **LGAL** - Indicates that the type of name is Legal. • **PRIM** - Indicates that the type of name is Primary. **Note:** You must specify a value which is already defined in the **NAME_TYPE_FLG** lookup field. It must be in the **Active** status.	**Note:** This data is required while defining or editing a person.
identifiers	Used to specify the identification details for the person. **Note:** You must specify the data in this field even though the information for a single person exists.	Yes (Conditional) **Note:** This data is required while defining or editing a person.
idType	You can use this tag within the following tags: • **identifiers** - Here, the **idType** tag is used to specify the person identifier type. • **related persons** - Here, the **idType** tag is used to specify the related persons identifier type. • **accountIdentifiers** - Here, the **idType** tag is used to specify the account identifier type.	Yes (Conditional) **Note:** This data is required while defining or editing a person, related persons, or account details.
idValue	You can use this tag within the following tags: • **identifiers** - Here, the **idValue** tag is used to specify the person identifier type. • **related persons** - Here, the **idValue** tag is used to specify the person identifier type. • **accountIdentifiers** - Here, the **idValue** tag is used to specify the account identifier type.	Yes (Conditional) **Note:** This data is required while defining or editing a person, related persons or account details.

isPrimary	You can use this tag within the following tags:
	• **identifiers** - Here, the **isPrimary** tag is used to indicate whether the person identifier is a primary identifier. The valid values are:
	  • **Y**
	  • **N**
	• **accountIdentifiers** - Here, the **isPrimary** tag is used to indicate whether the account identifier is a primary identifier. The valid values are:
	  • **Y**
	  • **N**
		No

division	You can use this tag within the following tags: • **personData** - Here, the **division** tag is used to indicate the division to which the person belongs.	No

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Tag Name	Tag Description	Mandatory (Yes or No)
	• **accountBalanceData** - Here, the **division** tag is used to indicate the division to which the account belongs.	
birthDate	Used to specify the date when the person was born. **Note:** You must specify the date in the `YYYY-MM-DD` format.	No
sinceDate	Used to specify the date when the person's record is created in the system. This is purely informational. **Note:** You must specify the date in the `YYYY-MM-DD` format.	No
address	Used to specify the address of the person.	Yes (Conditional) **Note:** This data is required while defining or editing the address of the person.
addressEffDate	Used to specify the date from when the address is effective. **Note:** You must specify the date in the `YYYY-MM-DD` format. If you do not specify the date, by default, the system sets the effective date to the date when the address is created in the system through the health care inbound message.	Yes (Conditional) **Note:** This data is required while editing the address of a person.
addressType	Used to indicate the type of address. The valid values are: • **MAIN** - Indicates that the address is the person's mailing address. You can use this address type while specifying the address for the person and account. • **SEAS** - Indicates that the address is the person's seasonal address. You can use this address type while specifying the address for the person. • **OVRD** - Indicates that the address is the account's override address. You can use this address type while specifying the address for the account. **Note:** If you do not specify the address type, by default, it is set to **MAIN**. You must specify an address type which is already defined in the **ADDRESS_TYPE_FLG** lookup field. It must be in the **Active** status.	Yes (Conditional) **Note:** This data is required while editing the address of a person or account.
mailingName	Used to specify the name using which the person should be addressed in the mail communication. The system also uses the mailing name in the bills, letters, quotes, and statements.	No

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Tag Name	Tag Description	Mandatory (Yes or No)
address1	Used to specify the first line of the address. It may contain details, such as the house number. **Note:** This data is required while defining and editing the address of a person.	Yes (Conditional)
address2	Used to specify the second line of the address. It may contain details, such as the apartment name.	No
address3	Used to specify the third line of the address. It may contain details, such as the street name.	No
address4	Used to specify the fourth line of the address. It may contain the landmark details.	No
city	Used to specify the city name.	No
state	Used to indicate the state where the city is located.	No
zip	Used to specify the zip code of the address.	No
country	Used to indicate the country where the person or account is located.	No
houseType	Used to indicate the type of the house. The valid values are: • **AB** - Indicates that the type of house is a House Boat Reference. • **WW** - Indicates that the type of house is a House Trailer Reference. **Note:** You must specify a value which is already defined in the **HOUSE_TYPE** lookup field. It must be in the **Active** status.	No
streetNumber1	Used to specify the numeric information, if any, related to the address.	No
streetNumber2	Used to specify the numeric information, if any, related to the address.	No
inCityLimit	Used to indicate whether the address is within the city limit. The valid values are: • **Y** • **N**	No
taxVendorGeographicalCode	Used to specify the geographic code of the address.	No
county	Used to specify the county name.	No
email	Used to specify the e-mail ID of the person.	No
overrideMailingName1	Used to specify the name using which you want to override the person's mailing name.	No
overrideMailingName2	Used to specify the name using which you want to override the person's override mailing name 1.	No
overrideMailingName3	Used to specify the name using which you want to override the person's override mailing name 2.	No

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Tag Name	Tag Description	Mandatory (Yes or No)
phones	Used to specify the phone details of the person.	Yes (Conditional) **Note:** This data is required while defining or editing the phone details of a person.
phoneType	Used to indicate the type of phone. **Note:** You must specify a phone type which is already defined in the system.	Yes (Conditional) **Note:** This data is required while defining or editing the phone details of a person.
phoneValue	Used to specify the phone number of the person.	Yes (Conditional) **Note:** This data is required while defining or editing the phone details of a person.
extension	Used to specify the extension value of the phone number.	Yes (Conditional) **Note:** This data is required while defining or editing the phone details of a person.
relatedPersons	Used to list other persons with whom you want to establish the person's relationship.	Yes (Conditional) **Note:** This data is required while defining or editing a person to person relationship.
personRelationshipType	Used to indicate how the other person is related to the person. **Note:** You must specify a person relationship type which is already defined in the system. If you have specified a parent customer as the related person for a bill group, the system, by default, uses the person relationship type which is specified in the **Person Relationship Type** option type of the **C1-ASOBLLNG** feature configuration. It does not considers the value specified in this tag.	Yes (Conditional) **Note:** This data is required while creating relationship between a bill group and person whose the person type is not **Parent Customer**.
financialRelationshipSw	Used to indicate whether the other person is financially responsible for the person. The valid values are: • **True** • **False** **Note:** If you do not specify the value, by default, it is set to **False**.	No

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Tag Name	Tag Description	Mandatory (Yes or No)
parentOrChild	Used to indicate whether the other person is parent or child. The valid values are: • **C** • **P** **Note:** You must specify a value which is already defined in the **PARENT_OR_CHILD_FLG** lookup field. It must be in the **Active** status.	Yes (Conditional) **Note:** This data is required while creating a person to person relationship.
relatedPersonsCharacteristicsList	Used to specify the characteristic details for the related person.	Yes (Conditional) **Note:** This data is required while defining or editing a characteristic of the respective entity.
characteristic	You can use this tag within the following tags: • **relatedPersonsCharacteristicsList** - Here, the **characteristic** tag is used to specify the characteristic details for the related person. • **personCharacteristicList** - Here, the **characteristic** tag is used to specify the characteristic details for the person. • **membershipCharacteristicList** - Here, the **characteristic** tag is used to specify the characteristic for the membership. **Note:** The characteristic tag (along with its elements) can be used more than once within the schema when the **Type** attribute of the characteristic is set to **List**. • **memberCharacteristicList** - Here, the **characteristic** tag is used to specify the characteristic for the membership. • **benefitCharacteristicsList** - Here, the **characteristic** tag is used to specify the characteristic details for the benefit.	Yes (Conditional) **Note:** This data is required while defining or editing a characteristic of the respective entity.
characteristicType	You can use this tag within the following tags: • **characteristic** - Here, the **characteristicType** tag is used to specify the characteristic type. • **characteristicList** - Here, the **characteristicType** tag is used to specify the characteristic type.	Yes (Conditional) **Note:** This data is required while defining or editing a characteristic of the respective entity.
characteristicValue	You can use this tag within the following tags: • **characteristic** - Here, the **characteristicValue** tag is used to specify the value for the predefined characteristic type. • **characteristicList** - Here, the **characteristicValue** tag is used to specify the value for the predefined characteristic type.	Yes (Conditional) **Note:** This data is required while defining or editing a characteristic of the respective entity.
effectiveDate	You can use this tag within the following tags:	No

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Tag Name	Tag Description	Mandatory (Yes or No)
	• **characteristic** - Here, the **effectiveDate** tag is used to specify the date from when the characteristic is effective. • **characteristicList** - Here, the **effectiveDate** tag is used to specify the date from when the characteristic details are effective for the account.	
personCharacteristicList	Used to specify the characteristic details for the related person.	Yes (Conditional) **Note:** This data is required while defining or editing a characteristic of the respective entity.
accountData	Used to specify the account details of a person.	Yes (Conditional) **Note:** This data is required while defining or editing an account.
accountType	Used to indicate the type of account. This information is stored as a characteristic for the account. **Note:** The value is stored in the characteristic type which is specified in the **Invoice Type Characteristic Type** option type of the **C1-ASOBLLNG** feature configuration. You must specify a value which is already defined in the predefined characteristic type.	Yes (Conditional) **Note:** This data is required while defining or editing an account.
customerClass	Used to indicate the customer class to which the account belongs.	Yes (Conditional) **Note:** This data is required while defining or editing an account.
postponeCreditReviewUntil	Used when you want to review the person's debt after a particular date. The system will consider the person for monitoring the delinquency only after the specified date. You can specify the postpone credit review until date for a person through a health care inbound message.	Yes (Conditional) **Note:** This data is required while defining or editing a person.
lastCreditReviewDate	Used to indicate the date when the person's debt was last reviewed. The system stamps the last credit review date against a person when a delinquency process is initiated for the person through the **C1-PRDLQ** batch.	Yes (Conditional) **Note:** This data is required while defining or editing a person.
dragDays	Used to specify additional grace days (if any) offered at the person level. These drag days are considered while calculating the grace end date when the trigger date calculation mode (in the respective delinquency process type) is set to **Latest Bill Due Date with Grace Period**.	Yes (Conditional) **Note:** This data is required while defining or editing a person.

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Tag Name	Tag Description	Mandatory (Yes or No)
advanceDepositAmount	Used to specify the advance deposit amount that will be parked at the parent customer level. It is required when the advance deposit level of the respective policy holder (i.e., parent customer) is set to **PG**. **Note:** You must specify a positive value in this field. This tag is applicable only for the fully-insured group business. For more information about the feature, see Allocate Advance Deposit for Delinquent Customers.	Yes (Conditional) **Note:** This data is required when you want to allocate advance deposit for delinquent customers.
advanceDepositGraceDays	Used to specify the grace days. The system then uses the grace days to derive the grace period within which the advance deposit should be received from the group customer. While calculating the grace period, the system derives the earliest start date among all the polices where the parent customer is the policy holder and considers it as the grace start date. Once the grace start date is derived, the system calculates the grace end date (i.e. grace start date + grace days). For example, if a parent customer is the policy holder of two policies - P1 (01-Jan-2022 to 31-Dec-2022) and P2 (01-Jun-2022 to 31-Dec-2022) and advance deposit grace days is set to 6 days, then the system considers 01-Jan-2022 as the grace start date (as it is the earliest start date) and sets the grace end date to 07-Jan-2022. The advance deposit grace days is required when the advance deposit level of the respective policy holder (i.e., parent customer) is set to **PG**. **Note:** You must specify an integer value in this field. This tag is applicable only for the fully-insured group business. For more information about the feature, see Allocate Advance Deposit for Delinquent Customers.	Yes (Conditional) **Note:** This data is required when you want to allocate advance deposit for delinquent customers.
advanceDepositLevel	Used to indicate whether you want to park the advance deposit received from the group customer at the parent customer or policy level. The valid values are: • **PG** - Used when you want to park the advance deposit at the parent customer level. • **POLI** - Used when you want to park the advance deposit at the policy level.	Yes (Conditional) **Note:** This data is required when you want to allocate advance deposit for delinquent customers.

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Tag Name	Tag Description	Mandatory (Yes or No)
	Note: The advance deposit level is only applicable for the person whose person type is set to **Parent Customer**. If you do not specify the advance deposit level, then the parent customer is not eligible for the advance deposit either at the parent customer or policy level. You must specify a value which is already defined in the **ADV_DEP_LVL_FLG** lookup field. This tag is applicable only for the fully-insured group business. For more information about the feature, see Allocate Advance Deposit for Delinquent Customers on page 4189.	
addressStatus	Used to indicate the status of the address. The valid values are: • C1AC • C1IN **Note:** • You must specify a value which is already defined in the **ADDR_STATUS_FLG** lookup field. It must be in the **Active** status. • While creating an address for an entity, the status of the address should always be set to **C1AC** (i.e. Active). • The **addressStatus** tag is not mandatory. Therefore, if you do not specify the value for the **addressStatus** tag while creating an address, the system, by default, sets it to **C1AC** (i.e. Active).	No
repriceAfterDate	Used to indicate whether you want to hold the repricing for the membership until the specified date.	No
billCycle	Used to indicate the bill cycle for the account. **Note:** You must specify a bill cycle which is already defined in the system.	No
billLeadDays	Used to indicate whether you want to bill the account in advance. Here, you need to specify the number of days which is used to derive the cut-off date for advance billing. If you do not want to bill the account in advance, you must specify the value as zero(0).	No
currency	Used to indicate the currency in which you want to bill the account. **Note:** You must specify a currency which is already defined in the system.	Yes (Conditional) **Note:** This data is required while defining an account.

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Tag Name	Tag Description	Mandatory (Yes or No)
setUpDate	Used to specify the date when the account was first created. This is purely informational. **Note:** You must specify the date in the `YYYY-MM-DD` format. If you do not specify the value, by default, it is set to the current date.	No
acctUsageFlg	Used to indicate the category to which the account belongs. The valid values are: • **INVC** - Indicates that the account will be used to bill charges of the usage accounts. • **SETL** - Indicates that the account will be used only for settlement purposes. • **USAG** - Indicates that the account will have its own charges. If the usage account is linked to any construct, the usage account's charges are billed through an invoice account. Otherwise, the usage account is billed individually. **Note:** You must specify a value which is already defined in the **ACCT_USAGE_FLG** lookup field. It must be in the **Active** status.	No
comments	Used to specify additional information about the account.	No
deferAutoPayDt	Used to specify the date till when you want to hold the automatic payment process for the account.	No
collectionClass	Used to control how the person's debt is compared against collection criteria (i.e. tolerance limit) to determine whether a collection process (such as delinquency process) should be initiated for the person. A new collection method named **Self-Control Delinquency** is available while defining a collection class. It is used to create a distinct or separate delinquency process for the persons who belong to the collection class. If you want to evaluate the debt of the person's accounts, its child persons, and the child persons' accounts while monitoring the person's delinquency, you must set the collection method of their respective collection class to **Parental Delinquency**. If you set the collection method of the collection class for any of the person's account, any of its child person, or child persons' accounts to **Self-Control Delinquency**, the system does not consider the debt of the respective entity while monitoring the delinquency of the parent person.	No

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Tag Name	Tag Description	Mandatory (Yes or No)
	Note: If you do not want to initiate delinquency process for a child person or an account, ensure that the person or account belongs to a collection class where the collection method is set to **Not Eligible for Collection**. If the collection class is not defined for a person, the system skips the person while monitoring the delinquency.	
billRouteType	Used to indicate how the account's bill must be sent to the main customer.	Yes (Conditional) **Note:** This data is required while defining the respective information.
billAddressSource	Used to indicate whether the account's bill must be sent to the main customer's mailing address or to the main customer's account override address. The valid values are: • **ACCT** • **ACOV** • **BILL** • **MAIN** • **PER** • **TEST** **Note:** You must specify a value which is already defined in the **BILL_ADDR_SRCE_FLG** lookup field. It must be in the **Active** status.	Yes (Conditional) **Note:** This data is required while defining the respective information.
accountIdentifiers	Used to specify the account identifiers for the account.	Yes
characteristics	Used to specify the characteristics for the account.	No
characteristicsList	Used to specify the characteristics information for the account.	No
membership	Used to specify information about the membership.	Yes
sourceSystem	Used to specify the external system from where the membership information is received for repricing. **Note:** You must specify a source system which is already defined in the **C1-SourceSystemLookup** extendable lookup. It must be in the **Active** status.	Yes
policyNumber	Used to specify the policy number.	Yes (Conditional) **Note:** This data is required while defining or editing the respective information.
planNumber	Used to specify the plan number.	Yes
healthPlanCode	Used to specify the health plan code.	Yes

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Tag Name	Tag Description	Mandatory (Yes or No)
boStatusCd	Used to indicate the status of the membership.	No

membershipType	You can use this tag within the following tags:
	• **membership** - Here, the **membershipType** tag is used to indicate the type of membership. The valid values are:
	  • **COBR**
	  • **MDCR**
	  • **RETR**
	Note: If you want to define an active employee coverage membership, you must leave this field blank.
	• **mainSubscriber** - Here, the **membershipType** tag is used to indicate the type of membership for the main subscriber.
	Note: You must specify a value which is already defined in the **MEMBERSHIP_TYPE_FLG** lookup field. It must be in the **Active** status.
		Yes

mainSubscriber	Used to indicate whether the person is the main subscriber of the membership. The valid values are: • **Yes** • **No**	Yes (Conditional) **Note:** This data is required only while defining the membership details of a person.
mainSubsIdType	Used to specify the type of main subscriber.	Yes (Conditional) **Note:** This data is required only while defining the membership details of a person.
mainSubsIdValue	Used to specify the value for the main subscriber.	Yes (Conditional) **Note:** This data is required only while defining the membership details of a person.
autoRenew	Used to indicate whether the individual membership should be automatically renewed.	No
associatedMemberIdentifierType	Used to specify the identifier type of the member who is associated with another individual membership.	No
associatedMemberIdentifier	Used to specify the identification of the member who is associated with another individual membership.	Yes (Conditional) **Note:** This data is required while defining or editing the individual membership.
exchangeFlag	Used to indicate whether the individual membership is purchased from the exchange. The valid values are:	Yes

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Tag Name	Tag Description	Mandatory (Yes or No)
	• **OFF** • **ON** **Note:** You must specify a value which is already defined in the **EXCHANGE_FLG** lookup field. It must be in the **Active** status.	
exchangeId	Used to specify the identification number of the exchange from where the individual membership is purchased.	Yes (Conditional) **Note:** This data is required when the exchangeFlag is set to **ON**.
binderLiabilityAmount	Used to specify the binder liability amount. **Note:** This data is required when the **Consider Binder Liability Amount** attribute is set to **Y** in the binder payment preference.	Yes (Conditional) **Note:** This data is required while defining or editing the individual membership.
binderPayApplicability	Used to indicate that the system should monitor whether the binder payment is received before activating the individual membership. The valid values are: • **Y** • **N**	No
binderPayGraceDays	Used to calculate the grace date for the individual membership.	Yes (Conditional) **Note:** This data is required when the binderPayApplicability is set to **Y**.
binderPayThreshold	Used to specify the threshold percentage using which the threshold amount should be calculated.	Yes (Conditional) **Note:** This data is required when the binderPayApplicability is set to **Y**.
holdBilling	Used to indicate whether you want to hold the bill generation process for the individual membership until the binder payment is received.	Yes (Conditional) **Note:** This data is required when you have selected the binderPayApplicability to **Y**.
membershipRenewalDate	Used to indicate the date when the individual membership should be renewed. **Note:** You must specify the renewal date when you are manually renewing the individual membership.	Yes (Conditional) **Note:** This data is required while defining or editing the individual membership.
contractPeriod	Used to indicate the period (in months) for which the individual membership should be automatically renewed.	Yes (Conditional)

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Tag Name	Tag Description	Mandatory (Yes or No)
		Note: This data is required while defining or editing the individual membership.
membershipIdentifierList	Used to specify the identification details for the membership.	Yes (Conditional) **Note:** This data is required while defining or editing the membership identifier details for the individual or group membership.
membershipIdentifier	Used to specify the identification for the membership.	Yes (Conditional) **Note:** This data is required while defining or editing the membership identifier details for the individual or group membership.
membershipIdentifierType	Used to specify the membership identifier type.	Yes (Conditional) **Note:** This data is required while defining or editing the membership identifier details for the individual or group membership.
membershipIdentifierValue	Used to specify the value for the predefined membership identifier type.	Yes (Conditional) **Note:** This data is required while defining or editing the membership identifier details for the individual or group membership.
membershipCharacteristicList	Used to specify the characteristic details for the membership.	Yes (Conditional) **Note:** This data is required only while defining the membership details of a person.
membershipRateGuarantee	Used to specify the rate guarantee information for each individual membership. **Note:** The rate guarantee information can be specified only while defining or editing the individual membership.	Yes (Conditional) **Note:** This data is required while defining or editing the respective information.
membershipRateGuaranteeList	Used to specify the rate guarantee details for the individual membership.	Yes (Conditional)

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Tag Name	Tag Description	Mandatory (Yes or No)
	Note: The rate guarantee details can be specified only while defining or editing the individual membership.	**Note:** This data is required while defining or editing the respective information.
rateGuaranteeStartDate	Used to specify the date from when the rate guarantee is available for the individual membership. **Note:** You can specify the rate guarantee start date only while defining or editing the individual membership. The rate guarantee start date cannot be later than rate guarantee end date. The rate guarantee start date cannot be earlier than the membership start date or later than membership end date.	Yes
rateGuaranteeEndDate	Used to specify the date till when the rate guarantee is available for the individual membership. The valid values are: • ACTV • INAC **Note:** You can specify the rate guarantee start date only while defining or editing the individual membership. The rate guarantee end date cannot be earlier than rate guarantee start date. The rate guarantee start end cannot be earlier than the membership start date or later than membership end date. You must specify a value which is already defined in the **RATE_GRNT_STATUS_FLG** lookup field. It must be in the **Active** status.	Yes (Conditional) **Note:** This data is required if you have specified the rateGuaranteeStartDate while defining or editing the individual membership.
rateGuaranteeStatus	Used to indicate the status of the rate guarantee period. The valid values are: • **Active** • **Inactive**	Yes
memberDataList	Used to specify basic information about the membership.	Yes (Conditional) **Note:** This data is required while defining or editing the membership details of a person.
memberData	Used to specify the details of the main subscriber or dependent person.	Yes (Conditional)

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Tag Name	Tag Description	Mandatory (Yes or No)
	Note: The member data information must be provided along with the enrollment dates whenever a new membership is created. The memberData tag (along with its elements) can only be used once within the schema, when the **Type** attribute of the memberData is set to **Group**.	**Note:** This data is required while defining the membership details of a person.
memberIdType	Used to specify the external membership ID.	Yes
memberIdValue	Used to specify the value for the external membership ID.	Yes
enrollmentStartDate	Used to specify the date from when you want to add the member person to the membership. **Note:** The enrollment start date cannot be later than the enrollment end date. The enrollment start date cannot be earlier than the membership start date or later than the membership end date.	Yes (Conditional) **Note:** This data is required while defining the membership details of a person.
enrollmentEndDate	Used to specify the date till when you want to add the member person to the membership. **Note:** The enrollment end date cannot be earlier than the enrollment start date. The enrollment end date cannot be earlier than the membership start date or later than the membership end date.	Yes (Conditional) **Note:** This data is required while defining the membership details of a person.
memberRelationship	Used to indicate how the main subscriber is related to the membership.	Yes (Conditional) **Note:** This data is required while defining or editing the membership details of a person.
membershipPersonStatus	Used to indicate the status of the person in the membership. The valid values are: • **ACTV** • **CNCL** • **INAC** • **PNEF** **Note:** You must specify a value which is already defined in the **MEMBER_PER_STATUS_FLG** lookup field. It must be in the **Active** status.	Yes
membershipPersonstatusReason	Used to indicate the reason why you want to change the status of the member person. The valid values are:	Yes

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Tag Name	Tag Description	Mandatory (Yes or No)
	• **ZZAB** • **ZZBN** • **ZZBR** • **ZZBS** • **ZZCN** • **ZZEL** • **ZZNW** • **ZZRE** • **ZZSP** • **ZZTM** **Note:** You must specify a value which is already defined in the **MEMB_PERS_STAT_RSN_FLG** lookup field. It must be in the **Active** status.	
memberId	Used to specify the external membership ID. **Note:** Here, you need to specify a membership ID which is maintained in the external source system.	No
financeRespFlag	Used to indicate whether the person is financially responsible for the membership. The valid values are: • **Yes** • **No**	No
isMemberSw	Used to indicate whether the person is a member or a non-member in the membership. The valid values are: • **Yes** • **No**	No
externalMedicareBeneficiaryId	Used to specify the Medicare beneficiary identifier of the person who has availed the Medicare benefit.	No
benefitData	Used to specify information about the membership benefit.	Yes (Conditional) **Note:** This data is required while defining or editing a membership benefit.
benefitDataList	Used to specify the details of a membership benefit.	Yes (Conditional) **Note:** This data is required while defining or editing a membership benefit.
benefitStatus	Used to indicate the status of the membership benefit. The valid values are: • **ACTIVE** • **DISCARD**	Yes (Conditional) **Note:** This data is required while defining or editing a benefit.

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Tag Name	Tag Description	Mandatory (Yes or No)
	Note: While defining a membership benefit, by default, the status is set to **Active**. On editing a membership benefit, the system inactivates the old record and creates a new record in the system. The status of the old benefit record is set to **Inactive** and the status of the new benefit record is set to **Active**. You can discard an active or inactive membership benefit whenever required.	
benefitSourceFlag	Used to indicate the source (i.e. health insurance exchange) from where the benefit is received for the membership. The valid values are: • **CMS** • **ST** **Note:** You must specify a value which is already defined in the **BENEFIT_SRC_FLG** lookup field. It must be in the **Active** status.	No
benefitSubTypeFlag	Used to indicate whether the membership benefit is a Medicare Part A, Part B, or Part D benefit, Medicare Part D LIS, Medicare Part D LEP, APTC benefit, or any other membership benefit. **Note:** You can only specify a benefit sub type which is already defined in the system.	No
planBenefitPackageId	Used to indicate the Medicare plan benefit package (i.e. 800 series plan) which is applicable for the membership benefit. **Note:** You can only specify a Medicare plan benefit package which is already defined in the system.	Yes (Conditional) **Note:** This data is required while creating the Medicare Part A, Part B, or Part D membership benefit.
benefitAmount	Used to specify the pass-through amount for the availed membership benefit.	Yes (Conditional) **Note:** This data is required while creating the Medicare Part D LIS, Medicare Part D LEP, APTC, or other membership benefits.

The following table provides information about the response tags in the membership repricing inbound web service:

Tag	Tag Description
responseDetails	Displays the information whether the membership repricing inbound web service was successfully processed or not.
membershipId	Indicates the membershipID for which the repricing should take place.

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Tag	Tag Description
responseStatus	Indicates the status of the response received from the membership repricing inbound web service. • If an error occurs while processing the membership repricing inbound web service, then the **responseStatus** tag contains **ERROR** as a response message received from the membership repricing inbound web service, and the error message is displayed in the **message** tag. • If the membership repricing inbound web service is correctly processed, then the **responseStatus** tag contains **SUCCESS** as a response message received from the membership repricing inbound web service. • If a transaction results in an error, then the changes requested as a part of the transaction are not processed and a rollback is performed.
message	Indicates the reason why the membership repricing inbound web service failed.
responseType	Indicates the type of response received from the inbound web service. The valid values are: • **DT** - Indicates that the response contains detailed information. • **SMRY** - Indicates that the response contains summary information.
paidThroughDate	Indicates the term end date of the last fully or partially paid term. For more information about the paid through date, refer to Policy on page 247.
premiumCalculationDetails	Displays the premium calculation details for the membership.
	Note: The premiumCalculationDetails tag (along with its elements) can be used only once within the schema when the **Type** attribute of the premiumCalculationDetails is set to **Group**.
premiumCalculation	Displays the total premium of all the members for the timeline.
	Note: The premiumCalculation tag (along with its elements) can be used more than once within the schema when the **Type** attribute of the premiumCalculation is set to **List**.
priceItemCd	Indicates the price item for which the billable charge is created.
startDt	Displays the start date of the timeline.
	Note: The startDt cannot be later than the endDt. The startDt cannot be earlier than the membership start date or later than the membership end date.
endDt	Displays the end date of the timeline.
	Note: The endDt cannot be earlier than the startDt. The endDt cannot be earlier than the membership start date or later than the membership end date.

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Tag	Tag Description
calcAmt	You can use this tag within the following tags: • **premiumCalculation** - Here, the **calcAmt** tag is used to display the premium amount calculated for the timeline. • **premiumCalcLines** - Here, the **calcAmt** tag is used to display the premium amount calculated for each eligible member in the membership.
distAmt	You can use this tag within the following tags: • **premiumCalculation** - Here, the **distAmt** tag is used to display the discount amount calculated for the timeline. • **premiumCalcLines** - Here, the **distAmt** tag is used to display the discount amount calculated for each eligible member in the membership.
currencyCd	You can use this tag within the following tags: • **premiumCalculation** - Here, the **currencyCd** tag is used to indicate the currency in which the premium is calculated for the timeline. • **premiumCalcLines** - Here, the **currencyCd** tag is used to indicates the currency in which the premium is calculated for each eligible member in the membership. **Note:** Here, the system chooses those currencies in which the bills added to the membership are created.
acctIdType	Indicates the account identifier type.
acctIdVal	Indicates the value of the account identifier type.
accountId	Indicates the account to which the membership is billed.
billableChgId	Indicates the billable charge ID.
pricingRuleId	Indicates the pricing rule using which the premium amount is calculated.
priceAsgnId	Indicates the price item pricing which is assigned to a membership.
premiumCalc LineDetails	Displays the premium calculated line details for each eligible member in the membership.
premiumCalcLines	Displays the premium calculated line information for each eligible member in the membership.
proFactor	Indicates the proration factor used to calculate the billable charges for the membership contract.
month	Displays the month of the premium calculation.
totalCalcAmt	Displays the total calculated amount for premium calculation.
entityTypeFlg	Indicates the type of entity created for premium calculation.
entityId	Indicates the entity ID.
referenceIdType	Indicates the reference type used for premium calculation.
referenceIdValue	Indicates the value of the reference identifier type.
pricingParameters	Indicates the pricing eligibility criteria which is satisfied while deriving the premium for the membership.

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Tag	Tag Description
description	Displays the description of the rate component for which the price component is created in the age based or tier based pricing.
accountBalance	Displays the amount balance in the account.
accountBalanceData	Displays the account balance data information.
accountIdentifierType	Indicates the account identifier type for the account.
accountNumber	Indicates the bank account through which automatic payment is made.
accountId	Indicates the account which made the payment.
division	You can use this tag within the following tags: • **personData** - Here, the **division** tag is used to display the division to which the person belongs • **accountBalanceData** - Here, the **division** tag is used to display the division to which the account belongs
sourceSystem	Indicates the external system from where the membership information is received for repricing.
c1External TransactionId	Indicates the transaction in the external source system which resulted in the customer inbound message.
externalSourceId	Displays the external source system ID.
accountInfoDtls	Displays the account information details of an account.
currentBalance	Displays the total amount of funds in the account.
lastBillAmount	Indicates the last bill amount generated for the membership.
statusCd	Indicates whether the membership repricing incoming message is successfully processed or not. The valid values are: • **Success** • **Fail**
messageText	Indicates the reason for an error occurrence.

Related Topics

For more information on...	See...
Membership Repricing Through Inbound Web Service	Membership Repricing Through Inbound Web Service

Sample Individual Membership Creation Request and Response in XML Format

Using the below example, you can do the following:

- Create an individual membership

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Person Name	Person Type	Policy Number	Plan Number	Main Subscriber
TIER_MEMX4_P1, TIER_MEMX4_P2	PERSON	REPRC_SD001_ IN1_POL1	REPRC_SD001_ IN1_POL01_P1	Yes

```
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        <responseStatus></responseStatus>
        <message></message>
    </responseDetails>
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            <startDate></startDate>
            <endDate></endDate>
        </dateFilter>
        <priceItemFilter>
            <priceItemList>
                <priceItemCode></priceItemCode>
            </priceItemList>
        </priceItemFilter>
        <responseType></responseType>
    </readFilters>
    <person>
        <personData>
            <sequence>1</sequence>
            <personType>P</personType>
            <personName>
                <sequence>1</sequence>
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                TIER_MEMX4_P1,TIER_MEMX4_P2
                </entityName>
                <nameType>PRIM</nameType>
            </personName>
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                <isPrimary>Y</isPrimary>
            </identifiers>
            <division>HC</division>
            <birthDate>1990-01-01</birthDate>
            <sinceDate>2019-01-01</sinceDate>
            <collectionClass></collectionClass>
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            <lastCreditReviewDate></lastCreditReviewDate>
            <dragDays></dragDays>
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            <advanceDepositGraceDays></advanceDepositGraceDays>
            <advanceDepositLevel></advanceDepositLevel>
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                <address2>7014-G WEST PARK</address2>
                <address3>SCOTTSDALE (NORTH)</address3>
                <address4>ARIZONA</address4>
                <city>SCOTTSDALE</city>
                <state>ARIZONA</state>
```

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```
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                <country>USA</country>
                <houseType>RANCH</houseType>
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                2020
                </taxVendorGeographicalCode>
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                <addressStatus>C1AC</addressStatus>
            </address>
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            <overrideMailingName1>
            tiermem05_p2@sofs.com
            </overrideMailingName1>
            <overrideMailingName2>
            tiermem05_p2@sofs.com
            </overrideMailingName2>
            <overrideMailingName3>
            tiermem05_p2@sofs.com
            </overrideMailingName3>
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                <extension>3234</extension>
            </phones>
            <phones>
                <phoneType>HOME</phoneType>
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```

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                        <characteristicValue>TESTMT5</characteristicValue>
                        <effectiveDate>2021-01-01</effectiveDate>
                    </characteristicsList>
                </characteristics>
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        </personData>
    </person>
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        <planNumber>REPRC_SD001_IN1_POL01_P1</planNumber
        <healthPlanCode>HLPNFSTEST145</healthPlanCode>
        <startDate>2021-01-01</startDate>
        <endDate>2021-12-31</endDate>
        <boStatusCd></boStatusCd>
        <paidThroughDate>2021-01-01</paidThroughDate>
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            <membershipType>RETR</membershipType>
        </mainSubscriber>
        <autoRenew>N</autoRenew>
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```
                                    <characteristicType>GENDER</
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characteristicValue>
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        </accountBalance>
</schema>
```

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Note: We have given the above sample to illustrate how the tags should be nested while sending an individual membership creation request from the external system. However, you should not seamlessly use this sample in your environment because the required pre-requisite data may not be available in your environment. In such case, the system will give erroneous results.

Sample Group Membership Creation Request and Response in XML Format

Using the below example, you can do the following:

- Create a group membership

Entity Name	Person Type	Policy Number	Plan Number	Main Subscriber
REPRC_ SD001_001_P1	Person	REPRC_SD001_ BG1_POL1	REPRC_SD001_ BG1_POL01_P1	Yes

```
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    </readFilters>
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            </identifiers>
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            <lastCreditReviewDate></lastCreditReviewDate>
            <dragDays></dragDays>
```

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```
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            <advanceDepositLevel></advanceDepositLevel>
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                <mailingName>MR.SEAN MILLER</mailingName>
                <address1>MILLER-CONWAY INC.</address1>
                <address2>7014-G SOUTH PARK</address2>
                <address3>SCOTTSDALE (WEST-SIDE)</address3>
                <address4>ARIZONA</address4>
                <city>SCOTTSDALE</city>
                <state>ARIZONA</state>
                <zip>85250</zip>
                <country>USA</country>
                <houseType>CAPE COD</houseType>
                <streetNumber1>270TH CENTRAL STREET</streetNumber1>
                <streetNumber2>MAIN CLIVE ROAD</streetNumber2>
                <inCityLimit>Y</inCityLimit>
                <taxVendorGeographicalCode></taxVendorGeographicalCode>
                <county>MARICOPA</county>
                <addressStatus>C1AC</addressStatus>
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            <overrideMailingName2>
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            <overrideMailingName3>
            reprc_sd001_001_p1@ssof.com
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```

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```
                HLPN022
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```

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```
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                <statusCd></statusCd>
                <messageText></messageText>
            </accountInfoDtls>
        </accountBalanceData>
    </accountBalance>
</schema>
```

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Note: We have given the above sample to illustrate how the tags should be nested while sending a group membership creation request from the external system. However, you should not seamlessly use this sample in your environment because the required pre-requisite data may not be available in your environment. In such case, the system will give erroneous results.

Sample Group Membership Read Request and Response in XML Format

Using the below example, you can do the following:

- View the details of the group membership with the membership Id as **147113405729021**

Person Name	Person Type	Membership ID	Policy Number	Main Subscriber
FINS_GRP013_ SEAN, FINS_GRP013_ BLIGNAUT	PERSON	147113405729021	FINS_GRP013_ POL1	Yes

```
<schema>
    <responseDetails>
        <membershipId>147113405729021</membershipId>
        <responseStatus>SUCCESS</responseStatus>
        <message></message>
    </responseDetails>
    <simulationSw>Y</simulationSw>
    <action></action>
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            <endDate>2021-12-31</endDate>
        </dateFilter>
        <priceItemFilter>
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                <priceItemCode>MEDPK1</priceItemCode>
            </priceItemList>
        </priceItemFilter>
        <responseType>DT</responseType>
    </readFilters>
    <person>
        <personData>
            <sequence>1</sequence>
            <personType>P</personType>
            <personName>
                <sequence>1</sequence>
                <entityName>
                FINS_GRP013_SEAN,FINS_GRP013_BLIGNAUT
                </entityName>
                <nameType>PRIM</nameType>
            </personName>
            <identifiers>
                <idType>WEB</idType>
                <idValue>FINS_GRP013_P1</idValue>
                <isPrimary>Y</isPrimary>
            </identifiers>
            <division>HC</division>
            <birthDate>1991-01-01</birthDate>
            <sinceDate>2021-01-01</sinceDate>
```

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```
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                <addressEffDate>2021-01-01</addressEffDate>
                <addressType>MAIN</addressType>
                <mailingName>MR.SEAN BLIGNAUT</mailingName>
                <address1>OSPS FINANCIAL SOFTWARE SERVICES</address1>
                <address2>5555-L BLISS RESIDENCY</address2>
                <address3>STATE HIGHWAY 28</address3>
                <address4>NORTH-EAST MAYERS COUNTY</address4>
                <city>BROKEN ARROW</city>
                <state>OKLAHOMA</state>
                <zip>73101</zip>
                <country>USA</country>
                <houseType>COLONIAL</houseType>
                <streetNumber1>270TH CENTRAL STREET</streetNumber1>
                <streetNumber2></streetNumber2>
                <inCityLimit>Y</inCityLimit>
                <taxVendorGeographicalCode>
                48201
                </taxVendorGeographicalCode>
                <county>MAYERS</county>
                <addressStatus>C1AC</addressStatus>
            </address>
            <email>fins_grp013_p1@orafss.com</email>
            <overrideMailingName1>
            fins_grp013_p1@orafss.com
            </overrideMailingName1>
            <overrideMailingName2>
            fins_grp013_p1@orafss.com
            </overrideMailingName2>
            <overrideMailingName3>
            fins_grp013_p1@orafss.com
            </overrideMailingName3>
            <phones>
                <phoneType>HOME</phoneType>
                <phoneValue>+1.612.321.5110</phoneValue>
                <extension></extension>
            </phones>
            <relatedPersons>
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```
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        <planNumber>FINS_GRP013_POL1_P1</planNumber
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        <endDate>2021-12-31</endDate>
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            <mainSubsIdValue>FINS_GRP013_SEAN</mainSubsIdValue>
            <membershipType>MDCR</membershipType>
        </mainSubscriber>
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        </associatedMemberIdentifier>
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        <exchangeId></exchangeId>
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        <binderPayGraceDays></binderPayGraceDays>
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```

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                </membershipPersonstatusReason>
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                FINS_SD001_P2
                </externalMedicareBeneficiaryId>
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                    </characteristic>
                </memberCharacteristicList>
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```

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```
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                            </characteristic>
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                <priceAsgnId>8220029141</priceAsgnId>
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                        </referenceIdValue>
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                </premiumCalcLineDetails>
            </premiumCalculation>
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           <accountNumber>FINSSEAN1011IN10519S1</accountNumber>
           <accountId>6573747915</accountId>
           <division>HC</division>
           <sourceSystem>PRIME</sourceSystem>
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           <externalSourceId></externalSourceId>
           <accountInfoDtls>
               <currentBalance>5000.00</currentBalance>
               <lastBillAmount>1000.00</lastBillAmount>
               <statusCd>SUCCESS</statusCd>
               <messageText></messageText>
           </accountInfoDtls>
```

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```
        </accountBalanceData>
    </accountBalance>
</schema>
```

Note: We have given the above sample to illustrate how the tags should be nested while sending a group membership read request from the external system. However, you should not seamlessly use this sample in your environment because the required pre-requisite data may not be available in your environment. In such case, the system will give erroneous results.

Sample Individual Membership Read Request and Response in XML Format

Using the below example, you can do the following:

- View the details of an individual membership with the membership Id is **018627581362534**

Person Name	Person Type	Membership ID	Policy Number	Main Subscriber
REPC_BEN, REPC_WOAKES	PERSON	018627581362534	REPC_BEN_POL1	Yes

```
<schema>
    <responseDetails>
        <membershipId>018627581362534</membershipId>
        <responseStatus>SUCCESS</responseStatus>
        <message></message>
    </responseDetails>
    <simulationSw>Y</simulationSw>
    <action></action>
    <readFilters>
        <dateFilter>
            <startDate>2021-01-01</startDate>
            <endDate>2021-12-31</endDate>
        </dateFilter>
        <priceItemFilter>
            <priceItemList>
                <priceItemCode>LEP</priceItemCode>
            </priceItemList>
        </priceItemFilter>
        <responseType>DT</responseType>
    </readFilters>
    <person>
        <personData>
            <sequence>1</sequence>
            <personType>P</personType>
            <personName>
                <sequence>1</sequence>
                <entityName>REPC_BEN,REPC_WOAKES</entityName>
                <nameType>PRIM</nameType>
            </personName>
            <identifiers>
                <idType>WEB</idType>
                <idValue>REPC_BEN</idValue>
                <isPrimary>Y</isPrimary>
            </identifiers>
            <division>HC</division>
            <birthDate>1982-07-07</birthDate>
            <sinceDate>2020-01-01</sinceDate>
```

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```
            <collectionClass></collectionClass>
            <postponeCreditReviewUntil></postponeCreditReviewUntil>
            <lastCreditReviewDate></lastCreditReviewDate>
            <dragDays></dragDays>
            <advanceDepositAmount></advanceDepositAmount>
            <advanceDepositGraceDays></advanceDepositGraceDays>
            <advanceDepositLevel></advanceDepositLevel>
            <address>
                <addressEffDate>2020-01-01</addressEffDate>
                <addressType>MAIN</addressType>
                <mailingName>BENJAMIN WOAKES</mailingName>
                <address1>THE WOAKES FINS SYSTEMS</address1>
                <address2>7773-K SOUTH WEST PARK</address2>
                <address3>SCOTTSDALE(WEST)</address3>
                <address4>ARIZONA</address4>
                <city>SCOTTSDALE</city>
                <state>ARIZONA</state>
                <zip>80255</zip>
                <country>USA</country>
                <houseType>RANCH</houseType>
                <streetNumber1>270TH MAIN STREET</streetNumber1>
                <streetNumber2>CENTRAL ROAD</streetNumber2>
                <inCityLimit>Y</inCityLimit>
                <taxVendorGeographicalCode>2020</taxVendorGeographicalCode>
                <county>MARICOPA</county>
                <addressStatus>C1AC</addressStatus>
            </address>
            <email>repc_ben_woakes@osfs.com</email>
            <overrideMailingName1>
            repc_ben_woakes@osfs.com
            </overrideMailingName1>
            <overrideMailingName2>
            repc_ben_woakes@osfs.com
            </overrideMailingName2>
            <overrideMailingName3>
            repc_ben_woakes@osfs.com
            </overrideMailingName3>
            <phones>
                <phoneType>BUSN</phoneType>
                <phoneValue>+1.623.555.6100</phoneValue>
                <extension>1041</extension>
            </phones>
            <phones>
                <phoneType>HOME</phoneType>
                <phoneValue>+1.663.555.3457</phoneValue>
                <extension></extension>
            </phones>
            <relatedPersons>
                <idType>WEB</idType>
                <idValue>REPC_BEN_C1</idValue>
                <personRelationshipType>CHILD</personRelationshipType>
                <startDate>2020-01-01</startDate>
                <endDate>2020-12-31</endDate>
                <financialRelationshipSw>FALSE</financialRelationshipSw>
                <parentOrChild>P</parentOrChild>
                <relatedPersonsCharacteristicsList>
                    <characteristic>
                        <characteristicType>RP-GAMBL</characteristicType>
                        <characteristicValue>DRCT</characteristicValue>
                        <effectiveDate>2020-01-01</effectiveDate>
                    </characteristic>
                </relatedPersonsCharacteristicsList>
            </relatedPersons>
            <personCharacteristicList>
```

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```
                <characteristic>
                    <characteristicType>ZZ-BLAGM</characteristicType>
                    <characteristicValue>DRCT</characteristicValue>
                    <effectiveDate>2020-01-01</effectiveDate>
                </characteristic>
            </personCharacteristicList>
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                    <characteristicsList>
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        <planNumber>REPC_BEN_POL1_P1</planNumber
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        <endDate>2021-12-31</endDate>
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        <paidThroughDate>2021-01-01</paidThroughDate>
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        </mainSubscriber>
        <autoRenew>N</autoRenew>
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        AADHR
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        <associatedMemberIdentifier>
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```

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```
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        <binderPayThreshold>1000</binderPayThreshold>
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        <contractPeriod>0</contractPeriod>
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                <rateGuaranteeEndDate>
                2021-12-31
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                <enrollmentEndDate>2021-12-31</enrollmentEndDate>
                <memberRelationship>OWNER</memberRelationship>
                <membershipPersonStatus>ACTV</membershipPersonStatus>
                <membershipPersonstatusReason>
                </membershipPersonstatusReason>
                <memberId>REPC_BEN_M1</memberId>
                <financeRespFlag>Y</financeRespFlag>
                <isMemberSw>Y</isMemberSw>
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                FINS_SD001_P2
                </externalMedicareBeneficiaryId>
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```
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                        <endDate>2020-10-31</endDate>
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                        <benefitSubTypeFlag>LEP</benefitSubTypeFlag>
                        <planBenefitPackageId>
                        MDCR078_P1
                        </planBenefitPackageId>
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                                </effectiveDate>
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                <acctIdVal>REPCBEN1011IN10519S1</acctIdVal>
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                <billableChgId>753035850030</billableChgId>
                <pricingRuleId>181910202193698</pricingRuleId>
                <priceAsgnId>8220029141</priceAsgnId>
                <premiumCalcLineDetails>
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                        <month>0</month>
                        <totalCalcAmt>1500.00</totalCalcAmt>
                        <currencyCd>USD</currencyCd>
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                        <referenceIdType>WEB</referenceIdType>
                        <referenceIdValue>
                        REPC_BEN_MAINSUB
                        </referenceIdValue>
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```

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```
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           <accountId>6573747915</accountId>
           <division>HC</division>
           <sourceSystem>ZZPRIME</sourceSystem>
           <c1ExternalTransactionId></c1ExternalTransactionId>
           <externalSourceId></externalSourceId>
           <accountInfoDtls>
               <currentBalance>3000.00</currentBalance>
               <lastBillAmount>1500.00</lastBillAmount>
               <statusCd>SUCCESS</statusCd>
               <messageText></messageText>
           </accountInfoDtls>
        </accountBalanceData>
    </accountBalance>
</schema>
```

Note: We have given the above sample to illustrate how the tags should be nested while sending an individual membership read request from the external system. However, you should not seamlessly use this sample in your environment because the required pre-requisite data may not be available in your environment. In such case, the system will give erroneous results.

Sample Member Person Creation Read Request and Response in XML Format

Using the below example, you can do the following:

- Create a member person for a membership

Person Name	Person Type	Membership ID	Policy Number	Main Subscriber
REPC_ANDY, REPC_WILLIAMS	PERSON	998162301690408	REPC_ANDY_POL1	Yes

```
<schema>
    <responseDetails>
        <membershipId>998162301690408</membershipId>
        <responseStatus>SUCCESS</responseStatus>
        <message></message>
    </responseDetails>
    <simulationSw>N</simulationSw>
    <action></action>
    <readFilters>
        <dateFilter>
            <startDate>2020-01-01</startDate>
            <endDate>2020-12-31</endDate>
        </dateFilter>
        <priceItemFilter>
            <priceItemList>
                <priceItemCode>AGEBASED_PROD2_INLOC</priceItemCode>
            </priceItemList>
        </priceItemFilter>
        <responseType>DT</responseType>
```

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```
    </readFilters>
    <person>
        <personData>
            <sequence></sequence>
            <personType></personType>
            <personName>
                <sequence></sequence>
                <entityName></entityName>
                <nameType></nameType>
            </personName>
            <identifiers>
                <idType></idType>
                <idValue></idValue>
                <isPrimary></isPrimary>
            </identifiers>
            <division>HC</division>
            <birthDate></birthDate>
            <sinceDate></sinceDate>
            <collectionClass></collectionClass>
            <postponeCreditReviewUntil></postponeCreditReviewUntil>
            <lastCreditReviewDate></lastCreditReviewDate>
            <dragDays></dragDays>
            <advanceDepositAmount></advanceDepositAmount>
            <advanceDepositGraceDays></advanceDepositGraceDays>
            <advanceDepositLevel></advanceDepositLevel>
            <address>
                <addressEffDate></addressEffDate>
                <addressType></addressType>
                <mailingName></mailingName>
                <address1></address1>
                <address2></address2>
                <address3></address3>
                <address4></address4>
                <city></city>
                <state></state>
                <zip></zip>
                <country></country>
                <houseType></houseType>
                <streetNumber1></streetNumber1>
                <streetNumber2></streetNumber2>
                <inCityLimit></inCityLimit>
                <taxVendorGeographicalCode>
                </taxVendorGeographicalCode>
                <county></county>
                <addressStatus>C1AC</addressStatus>
            </address>
            <email></email>
            <overrideMailingName1></overrideMailingName1>
            <overrideMailingName2></overrideMailingName2>
            <overrideMailingName3></overrideMailingName3>
            <phones>
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                <phoneValue></phoneValue>
                <extension></extension>
            </phones>
            <relatedPersons>
                <idType></idType>
                <idValue></idValue>
                <personRelationshipType></personRelationshipType>
                <startDate></startDate>
                <endDate></endDate>
                <financialRelationshipSw></financialRelationshipSw>
                <parentOrChild></parentOrChild>
                <relatedPersonsCharacteristicsList>
```

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```
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                        <effectiveDate></effectiveDate>
                    </characteristic>
                </relatedPersonsCharacteristicsList>
            </relatedPersons>
            <personCharacteristicList>
                <characteristic>
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                    <characteristicValue></characteristicValue>
                    <effectiveDate></effectiveDate>
                </characteristic>
            </personCharacteristicList>
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                <customerClass></customerClass>
                <billCycle></billCycle>
                <billLeadDays></billLeadDays>
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                <setUpDate></setUpDate>
                <acctUsageFlg></acctUsageFlg>
                <comments></comments>
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                <billAddressSource></billAddressSource>
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                        <characteristicValue></characteristicValue>
                        <effectiveDate></effectiveDate>
                    </characteristicsList>
                </characteristics>
            </accountData>
        </personData>
    </person>
    <membership>
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        <policyNumber>REPC_ANDY_POL1</policyNumber>
        <planNumber>REPC_ANDY_POL1_PLN1</planNumber>
        <healthPlanCode></healthPlanCode>
        <startDate>2023-01-01</startDate>
        <endDate>2023-12-31</endDate>
        <boStatusCd></boStatusCd>
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            <membershipType>MDCR</membershipType>
        </mainSubscriber>
        <autoRenew></autoRenew>
        <associatedMemberIdentifierType>
        </associatedMemberIdentifierType>
        <associatedMemberIdentifier>
        </associatedMemberIdentifier>
        <exchangeFlag></exchangeFlag>
```

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```
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        <binderPayGraceDays></binderPayGraceDays>
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        <contractPeriod></contractPeriod>
        <repriceAfterDate></repriceAfterDate>
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                </membershipIdentifierType>
                <membershipIdentifierValue>
                </membershipIdentifierValue>
            </membershipIdentifier>
        </membershipIdentifierList>
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            </characteristic>
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            <membershipRateGuaranteeList>
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                <rateGuaranteeEndDate></rateGuaranteeEndDate>
                <rateGuaranteeStatus></rateGuaranteeStatus>
            </membershipRateGuaranteeList>
        </membershipRateGuarantee>
        <memberDataList>
            <memberData>
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                <memberIdValue>REPC_ANDY_0090_P1</memberIdValue>
                <enrollmentStartDate>2023-01-01</enrollmentStartDate>
                <enrollmentEndDate>2023-12-31</enrollmentEndDate>
                <memberRelationship>OWNER</memberRelationship>
                <membershipPersonStatus>ACTIVE</membershipPersonStatus>
                <membershipPersonstatusReason>
                ZZNW
                </membershipPersonstatusReason>
                <memberId>REPC_ANDY_0099_M1</memberId>
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                <isMemberSw>Y</isMemberSw>
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                REPC_ANDY_0090_P1
                </externalMedicareBeneficiaryId>
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                        <effectiveDate>2023-01-01</effectiveDate>
                    </characteristic>
                </memberCharacteristicList>
                <benefitData>
                    <benefitDataList>
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                        <startDate>2023-02-01</startDate>
                        <endDate>2023-10-31</endDate>
                        <benefitStatus>ACTIVE</benefitStatus>
                        <benefitSourceFlag>CMS</benefitSourceFlag>
                        <benefitSubTypeFlag>LEP</benefitSubTypeFlag>
                        <planBenefitPackageId>
```

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```
                        MDCR078_P1
                        </planBenefitPackageId>
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                                GENDER
                                </characteristicType>
                                <characteristicValue>
                                MALE
                                </characteristicValue>
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                                </effectiveDate>
                            </characteristic>
                        </benefitCharacteristicsList>
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                </benefitData>
            </memberData>
        </memberDataList>
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            <premiumCalculation>
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                <currencyCd></currencyCd>
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                        <distAmt></distAmt>
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                        <totalCalcAmt></totalCalcAmt>
                        <currencyCd></currencyCd>
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                </premiumCalcLineDetails>
            </premiumCalculation>
        </premiumCalculationDetails>
    </membership>
    <accountBalance>
       <accountBalanceData>
            <accountIdentifierType></accountIdentifierType>
            <accountNumber></accountNumber>
            <accountId></accountId>
            <division></division>
            <sourceSystem></sourceSystem>
            <c1ExternalTransactionId></c1ExternalTransactionId>
            <externalSourceId></externalSourceId>
            <accountInfoDtls>
                <currentBalance></currentBalance>
```

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```
                <lastBillAmount></lastBillAmount>
                <statusCd></statusCd>
                <messageText></messageText>
            </accountInfoDtls>
        </accountBalanceData>
    </accountBalance>
</schema>
```

Note: We have given the above sample to illustrate how the tags should be nested while sending a member person creation read request from the external system. However, you should not seamlessly use this sample in your environment because the required pre-requisite data may not be available in your environment. In such case, the system will give erroneous results.

Sample Individual Membership Premium Simulation Request and Response in XML Format

Using the below example, you can do the following:

- Simulate the premium calculation process for an individual membership

Person Name	Person Type	Policy Number	Plan Number	Main Subscriber
REPRC1011_ MAINSUB	PERSON	REPRC1011_ POLICY	REPRC1011_ DENTAL_ PLAN	YES

```
<schema>
    <responseDetails>
        <membershipId>229160661076798</membershipId>
        <responseStatus>SUCCESS</responseStatus>
        <message></message>
    </responseDetails>
    <simulationSw>Y</simulationSw>
    <action></action>
    <readFilters>
        <dateFilter>
            <startDate></startDate>
            <endDate></endDate>
        </dateFilter>
        <priceItemFilter>
            <priceItemList>
                <priceItemCode></priceItemCode>
            </priceItemList>
        </priceItemFilter>
        <responseType></responseType>
    </readFilters>
    <person>
        <personData>
            <sequence>1</sequence>
            <personType>P</personType>
            <personName>
                <sequence>1</sequence>
                <entityName>REPRC1011_MAINSUB</entityName>
                <nameType>P</nameType>
            </personName>
            <identifiers>
```

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```
            <idType>WEB</idType>
            <idValue>REPRC1011_MAINSUB</idValue>
            <isPrimary>Y</isPrimary>
        </identifiers>
        <division>HC</division>
        <birthDate>1982-07-07</birthDate>
        <sinceDate>2019-01-01</sinceDate>
        <collectionClass></collectionClass>
        <postponeCreditReviewUntil></postponeCreditReviewUntil>
        <lastCreditReviewDate></lastCreditReviewDate>
        <dragDays></dragDays>
        <advanceDepositAmount></advanceDepositAmount>
        <advanceDepositGraceDays></advanceDepositGraceDays>
        <advanceDepositLevel></advanceDepositLevel>
        <address>
            <addressEffDate>2019-01-01</addressEffDate>
            <addressType>MAIN</addressType>
            <mailingName>MR.JAMES BENNETT</mailingName>
            <address1>FINS COBRA SOFTWARE SERVICES</address1>
            <address2>BESIDES HUB MALL</address2>
            <address3>OPPOSITE TO WEH</address3>
            <address4>THANES CITY</address4>
            <city>DALLAS</city>
            <state>TX</state>
            <zip>400081</zip>
            <country>USA</country>
            <houseType>RANCH</houseType>
            <streetNumber1></streetNumber1>
            <streetNumber2></streetNumber2>
            <inCityLimit></inCityLimit>
            <taxVendorGeographicalCode>
            </taxVendorGeographicalCode>
            <county></county>
            <addressStatus>C1AC</addressStatus>
        </address>
        <email>reprc_sd001_001_p1@sofs.com</email>
        <overrideMailingName1>
        reprc_sd001_001_p1@sofs.com
        </overrideMailingName1>
        <overrideMailingName2>
        reprc_sd001_001_p1@sofs.com
        </overrideMailingName2>
        <overrideMailingName3>
        reprc_sd001_001_p1@sofs.com
        </overrideMailingName3>
        <phones>
            <phoneType>BUSN</phoneType>
            <phoneValue>+1.610.415.7111</phoneValue>
            <extension>250</extension>
        </phones>
        <relatedPersons>
            <idType></idType>
            <idValue></idValue>
            <personRelationshipType></personRelationshipType>
            <startDate></startDate>
            <endDate></endDate>
            <financialRelationshipSw></financialRelationshipSw>
            <parentOrChild></parentOrChild>
            <relatedPersonsCharacteristicsList>
                <characteristic>
                    <characteristicType></characteristicType>
                    <characteristicValue></characteristicValue>
                    <effectiveDate></effectiveDate>
                </characteristic>
```

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```
                </relatedPersonsCharacteristicsList>
            </relatedPersons>
            <personCharacteristicList>
                <characteristic>
                    <characteristicType></characteristicType>
                    <characteristicValue></characteristicValue>
                    <effectiveDate></effectiveDate>
                </characteristic>
            </personCharacteristicList>
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                <customerClass></customerClass>
                <billCycle></billCycle>
                <billLeadDays></billLeadDays>
                <division></division>
                <currency></currency>
                <setUpDate></setUpDate>
                <acctUsageFlg></acctUsageFlg>
                <comments></comments>
                <deferAutoPayDt></deferAutoPayDt>
                <collectionClass></collectionClass>
                <billRouteType></billRouteType>
                <billAddressSource></billAddressSource>
                <accountIdentifiers>
                    <idType></idType>
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                    <isPrimary></isPrimary>
                </accountIdentifiers>
                <characteristics>
                    <characteristicsList>
                        <characteristicType></characteristicType>
                        <characteristicValue></characteristicValue>
                        <effectiveDate></effectiveDate>
                    </characteristicsList>
                </characteristics>
            </accountData>
        </personData>
    </person>
    <membership>
        <sourceSystem>UHG</sourceSystem>
        <policyNumber>REPRC1011_POLICY</policyNumber>
        <planNumber></planNumber>
        <healthPlanCode>REPRC1011_DENTAL_PLAN</healthPlanCode>
        <startDate>2019-01-01</startDate>
        <endDate>2019-12-31</endDate>
        <boStatusCd></boStatusCd>
        <paidThroughDate>2019-01-01</paidThroughDate>
        <membershipType></membershipType>
        <mainSubscriber>
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            <mainSubsIdValue>REPRC1011_MAINSUB</mainSubsIdValue>
            <membershipType></membershipType>
        </mainSubscriber>
        <autoRenew>N</autoRenew>
        <associatedMemberIdentifierType>
        </associatedMemberIdentifierType>
        <associatedMemberIdentifier>
        </associatedMemberIdentifier>
        <exchangeFlag>ON</exchangeFlag>
        <exchangeId>HPLN027</exchangeId>
        <binderLiabilityAmount>600</binderLiabilityAmount>
        <binderPayApplicability>y</binderPayApplicability>
        <binderPayGraceDays>10</binderPayGraceDays>
        <binderPayThreshold>400</binderPayThreshold>
```

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```
        <holdBilling>N</holdBilling>
        <membershipRenewalDate></membershipRenewalDate>
        <contractPeriod>0</contractPeriod>
        <repriceAfterDate></repriceAfterDate>
        <membershipIdentifierList>
            <membershipIdentifier>
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                AADHAR
                </membershipIdentifierType>
                <membershipIdentifierValue>
                HLPN022
                </membershipIdentifierValue>
            </membershipIdentifier>
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        <membershipCharacteristicList>
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                </effectiveDate>
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        </membershipRateGuarantee>
        <memberDataList>
            <memberData>
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                <memberIdValue>REPRC1011_MAINSUB</memberIdValue>
                <enrollmentStartDate>2019-01-01</enrollmentStartDate>
                <enrollmentEndDate>2019-12-31</enrollmentEndDate>
                <memberRelationship>OWNER</memberRelationship>
                <membershipPersonStatus>ACTIVE</membershipPersonStatus>
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                </membershipPersonstatusReason>
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                <financeRespFlag>Y</financeRespFlag>
                <isMemberSw>Y</isMemberSw>
                <externalMedicareBeneficiaryId>
                </externalMedicareBeneficiaryId>
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                                MALE
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                            </characteristic>
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                <endDt>2019-02-31</endDt>
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                <acctIdVal>REPRC1011BG10519S1</acctIdVal>
                <accountId>6573747915</accountId>
                <billableChgId>094032550028</billableChgId>
                <pricingRuleId>181910202193698</pricingRuleId>
                <priceAsgnId>8220029141</priceAsgnId>
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                        <referenceIdValue>REPRC1011_MAINSUB</
referenceIdValue>
                        <pricingParameters>AGEBASED</pricingParameters>
                        <description>AGE BASED PARAMETER</description>
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    </membership>
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           <accountId></accountId>
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```

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```
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                <lastBillAmount></lastBillAmount>
                <statusCd></statusCd>
                <messageText></messageText>
            </accountInfoDtls>
        </accountBalanceData>
    </accountBalance>
</schema>
```

Note: We have given the above sample to illustrate how the tags should be nested while sending an individual membership premium simulation request from the external system. However, you should not seamlessly use this sample in your environment because the required pre-requisite data may not be available in your environment. In such case, the system will give erroneous results.

Sample Group Membership Premium Simulation Request and Response in XML Format

Using the below example, you can do the following:

- Simulate the premium calculation process for a group membership.

Person Name	Person Type	Policy Number	Plan Number	Main Subscriber
FINS_COBRA_ LOC0098_P1	PERSON	FINS_COBRA_ LOC0098_BG1_POL1	FINS_COBRA_ LOC0098_BG1_ POL1_P1	YES

```
<schema>
    <responseDetails>
        <membershipId>998162301690408</membershipId>
        <responseStatus>SUCCESS</responseStatus>
        <message></message>
    </responseDetails>
    <simulationSw>Y</simulationSw>
    <action></action>
    <readFilters>
        <dateFilter>
            <startDate></startDate>
            <endDate></endDate>
        </dateFilter>
        <priceItemFilter>
            <priceItemList>
                <priceItemCode></priceItemCode>
            </priceItemList>
        </priceItemFilter>
        <responseType></responseType>
    </readFilters>
    <person>
        <personData>
            <sequence>1</sequence>
            <personType>P</personType>
            <personName>
                <sequence>1</sequence>
                <entityName>FINS_COBRA_LOC0098_P1</entityName>
                <nameType>P</nameType>
```

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```
            </personName>
            <identifiers>
                <idType>WEB</idType>
                <idValue>FINS_COBRA_LOC0098_P1</idValue>
                <isPrimary>Y</isPrimary>
            </identifiers>
            <division>HC</division>
            <birthDate>1991-01-01</birthDate>
            <sinceDate>2019-01-01</sinceDate>
            <collectionClass></collectionClass>
            <postponeCreditReviewUntil></postponeCreditReviewUntil>
            <lastCreditReviewDate></lastCreditReviewDate>
            <dragDays></dragDays>
            <advanceDepositAmount></advanceDepositAmount>
            <advanceDepositGraceDays></advanceDepositGraceDays>
            <advanceDepositLevel></advanceDepositLevel>
            <address>
                <addressEffDate>2019-01-01</addressEffDate>
                <addressType>MAIN</addressType>
                <mailingName>MR.SETH JAMIESON</mailingName>
                <address1>FINS COBRA SOFTWARE SERVICES</address1>
                <address2>BESIDES HUB MALL</address2>
                <address3>OPPOSITE TO WEH</address3>
                <address4>THANE VALLEY</address4>
                <city>TULSA</city>
                <state>OKLAHOMA</state>
                <zip>74014</zip>
                <country>USA</country>
                <houseType>RANCH</houseType>
                <streetNumber1></streetNumber1>
                <streetNumber2></streetNumber2>
                <inCityLimit>Y</inCityLimit>
                <taxVendorGeographicalCode>
                </taxVendorGeographicalCode>
                <county></county>
                <addressStatus>C1AC</addressStatus>
            </address>
            <email>fins_cobra_LOC0098_p1@finscobra.com</email>
            <overrideMailingName1>
            fins_cobra_LOC0098_p1@finscobra.com
            </overrideMailingName1>
            <overrideMailingName2>
            fins_cobra_LOC0098_p1@finscobra.com
            </overrideMailingName2>
            <overrideMailingName3>
            fins_cobra_LOC0098_p1@finscobra.com
            </overrideMailingName3>
            <phones>
                <phoneType>BUSN</phoneType>
                <phoneValue>+1.503.444.5100</phoneValue>
                <extension>523</extension>
            </phones>
            <relatedPersons>
                <idType></idType>
                <idValue></idValue>
                <personRelationshipType></personRelationshipType>
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                <endDate></endDate>
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```
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                    COBRA BILLING ARRANGEMENT
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                    DRCT
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                <billCycle>AUT</billCycle>
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                <division>HC</division>
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    <membership>
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        <planNumber>FINS_COBRALOC0099_BG1_POL1_P1</planNumber>
        <healthPlanCode></healthPlanCode>
        <startDate>2020-01-01</startDate>
        <endDate>2020-31-12</endDate>
        <boStatusCd></boStatusCd>
        <paidThroughDate></paidThroughDate>
        <membershipType>COBRA</membershipType>
        <mainSubscriber>
            <mainSubsIdType>WEB</mainSubsIdType>
            <mainSubsIdValue>FINS_COBRA_LOC0098_P1</mainSubsIdValue>
            <membershipType>COBRA</membershipType>
        </mainSubscriber>
        <autoRenew></autoRenew>
        <associatedMemberIdentifierType>
        </associatedMemberIdentifierType>
        <associatedMemberIdentifier>
```

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```
        </associatedMemberIdentifier>
        <exchangeFlag></exchangeFlag>
        <exchangeId></exchangeId>
        <binderLiabilityAmount></binderLiabilityAmount>
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        <binderPayGraceDays></binderPayGraceDays>
        <binderPayThreshold></binderPayThreshold>
        <holdBilling></holdBilling>
        <membershipRenewalDate></membershipRenewalDate>
        <contractPeriod></contractPeriod>
        <repriceAfterDate></repriceAfterDate>
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            </membershipIdentifier>
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            <characteristic>
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                BL_1
                </characteristicType>
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                FINS_COBRA_LOC0098_BG1_PARAM1
                </characteristicValue>
                <effectiveDate>
                01-01-2020
                </effectiveDate>
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        </membershipRateGuarantee>
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            <memberData>
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                <memberIdValue>FINS_COBRA_LOC0098_P1</memberIdValue>
                <enrollmentStartDate>2019-01-01</enrollmentStartDate>
                <enrollmentEndDate>2019-12-31</enrollmentEndDate>
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                <membershipPersonStatus>ACTIVE</membershipPersonStatus>
                <membershipPersonstatusReason></
membershipPersonstatusReason>
                <memberId>FINS_COBRA_LOC0090_M1</memberId>
                <financeRespFlag>Y</financeRespFlag>
                <isMemberSw>Y</isMemberSw>
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                FINS_COBRA_LOC0099_P1
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                        <characteristicType>DRUGGIST</characteristicType>
                        <characteristicValue>Y</characteristicValue>
                        <effectiveDate>2019-01-01</effectiveDate>
                    </characteristic>
                </memberCharacteristicList>
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```
                        <endDate>2019-10-31</endDate>
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                        <benefitAmount>1200.25</benefitAmount>
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                                C1-GENDR
                                </characteristicType>
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                <pricingRuleId>262212202052080</pricingRuleId>
                <priceAsgnId>8220029141</priceAsgnId>
                <premiumCalcLineDetails>
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                        <calcAmt>100.00</calcAmt>
                        <distAmt>0</distAmt>
                        <month>0</month>
                        <totalCalcAmt>0</totalCalcAmt>
                        <currencyCd>USD</currencyCd>
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                        </referenceIdValue>
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                </premiumCalcLineDetails>
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    </membership>
    <accountBalance>
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           <accountNumber></accountNumber>
           <accountId></accountId>
           <division></division>
```

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```
            <sourceSystem></sourceSystem>
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                <currentBalance></currentBalance>
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                <statusCd></statusCd>
                <messageText></messageText>
            </accountInfoDtls>
        </accountBalanceData>
    </accountBalance>
</schema>
```

Note: We have given the above sample to illustrate how the tags should be nested while sending a group membership premium simulation request from the external system. However, you should not seamlessly use this sample in your environment because the required pre-requisite data may not be available in your environment. In such case, the system will give erroneous results.

Sample Account Balance Read Request and Response in XML Format

Using the below example, you can do the following:

- View the account balance for the membership.

Entity Name	Membership Id	Policy Number	Plan Number	Main Subscriber
REPRC1000, MAIN_SUB	229160661076798	REPRC1000_ Policy	REPRC1000_ DENTAL_PLAN	Yes

```
<schema>
    <responseDetails>
        <membershipId>229160661076798</membershipId>
        <responseStatus>SUCCESS</responseStatus>
        <message></message>
    </responseDetails>
    <simulationSw>Y</simulationSw>
    <action></action>
    <readFilters>
        <dateFilter>
            <startDate>2019-01-01</startDate>
            <endDate>2019-12-31</endDate>
        </dateFilter>
        <priceItemFilter>
            <priceItemList>
                <priceItemCode></priceItemCode>
            </priceItemList>
        </priceItemFilter>
        <responseType></responseType>
    </readFilters>
    <person>
        <personData>
            <sequence>1</sequence>
            <personType>P</personType>
            <personName>
                <sequence>1</sequence>
                <entityName>REPRC1000,MAIN_SUB</entityName>
                <nameType>PRIM</nameType>
```

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```
            </personName>
            <identifiers>
                <idType>WEB</idType>
                <idValue>REPRC1000_MAIN_SUB</idValue>
                <isPrimary>Y</isPrimary>
            </identifiers>
            <division>HC</division>
            <birthDate>1982-07-07</birthDate>
            <sinceDate>2019-01-01</sinceDate>
            <collectionClass></collectionClass>
            <postponeCreditReviewUntil></postponeCreditReviewUntil>
            <lastCreditReviewDate></lastCreditReviewDate>
            <dragDays></dragDays>
            <advanceDepositAmount></advanceDepositAmount>
            <advanceDepositGraceDays></advanceDepositGraceDays>
            <advanceDepositLevel></advanceDepositLevel>
            <address>
                <addressEffDate>2019-01-01</addressEffDate>
                <addressType>MAIN</addressType>
                <mailingName>MR.ROGER HARVEY</mailingName>
                <address1>ONL SOFTWARE INC.</address1>
                <address2>401 BLACKWOOD ISLAND PARKWAY</address2>
                <address3>NEXT TO HUB SHOPPING ARENA</address3>
                <address4>CENTRAL ROAD</address4>
                <city>FLORIDA</city>
                <state>MIAMI</state>
                <zip>94065</zip>
                <country>USA</country>
                <houseType>COLONIAL</houseType>
                <streetNumber1></streetNumber1>
                <streetNumber2></streetNumber2>
                <inCityLimit>Y</inCityLimit>
                <taxVendorGeographicalCode>22310</taxVendorGeographicalCode>
                <county>MIAMI-DADE</county>
                <addressStatus>C1AC</addressStatus>
            </address>
            <email>reprc_sd001_001_p1@onlsinc.com</email>
            <overrideMailingName1>
            reprc_sd001_001_p1@onlsinc.com
            </overrideMailingName1>
            <overrideMailingName2>
            reprc_sd001_001_p1@onlsinc.com
            </overrideMailingName2>
            <overrideMailingName3>
            reprc_sd001_001_p1@onlsinc.com
            </overrideMailingName3>
            <phones>
                <phoneType>BUSN</phoneType>
                <phoneValue>+1.603.555.0100</phoneValue>
                <extension>713</extension>
            </phones>
            <relatedPersons>
                <idType></idType>
                <idValue></idValue>
                <personRelationshipType></personRelationshipType>
                <startDate></startDate>
                <endDate></endDate>
                <financialRelationshipSw></financialRelationshipSw>
                <parentOrChild></parentOrChild>
                <relatedPersonsCharacteristicsList>
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                        <characteristicValue></characteristicValue>
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```

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```
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            </relatedPersons>
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                    <characteristicValue></characteristicValue>
                    <effectiveDate></effectiveDate>
                </characteristic>
            </personCharacteristicList>
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                <billLeadDays></billLeadDays>
                <division></division>
                <currency></currency>
                <setUpDate></setUpDate>
                <acctUsageFlg></acctUsageFlg>
                <comments></comments>
                <deferAutoPayDt></deferAutoPayDt>
                <collectionClass></collectionClass>
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                    <isPrimary></isPrimary>
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                        <effectiveDate></effectiveDate>
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                </characteristics>
            </accountData>
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    <membership>
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        <policyNumber>REPRC1000_POLICY</policyNumber>
        <planNumber>REPRC1000_DENTAL_PLAN</planNumber>
        <healthPlanCode></healthPlanCode>
        <startDate>2019-01-01</startDate>
        <endDate>2019-12-31</endDate>
        <boStatusCd></boStatusCd>
        <paidThroughDate>2019-01-01</paidThroughDate>
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        <mainSubscriber>
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            <mainSubsIdValue>Reprc1011_MAINSUB</mainSubsIdValue>
            <membershipType></membershipType>
        </mainSubscriber>
        <autoRenew>N</autoRenew>
        <associatedMemberIdentifierType>
        AADHR
        </associatedMemberIdentifierType>
        <associatedMemberIdentifier>
        HLPN022
        </associatedMemberIdentifier>
        <exchangeFlag>ON</exchangeFlag>
        <exchangeId>HLPNFSTEST145</exchangeId>
        <binderLiabilityAmount></binderLiabilityAmount>
```

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```
        <binderPayApplicability></binderPayApplicability>
        <binderPayGraceDays></binderPayGraceDays>
        <binderPayThreshold></binderPayThreshold>
        <holdBilling></holdBilling>
        <membershipRenewalDate></membershipRenewalDate>
        <contractPeriod></contractPeriod>
        <repriceAfterDate></repriceAfterDate>
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                <membershipIdentifierValue></membershipIdentifierValue>
            </membershipIdentifier>
        </membershipIdentifierList>
        <membershipCharacteristicList>
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                <characteristicValue>REPRC1000</characteristicValue>
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                <enrollmentEndDate>2019-12-31</enrollmentEndDate>
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                <membershipPersonStatus>ACTV</membershipPersonStatus>
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                </membershipPersonstatusReason>
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                <financeRespFlag>N</financeRespFlag>
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                <externalMedicareBeneficiaryId>
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                <memberCharacteristicList>
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                        <characteristicValue>Y</characteristicValue>
                        <effectiveDate>2019-01-01</effectiveDate>
                    </characteristic>
                </memberCharacteristicList>
                <benefitData>
                    <benefitDataList>
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                        <endDate>2019-10-31</endDate>
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</schema>
```

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Note: We have given the above sample to illustrate how the tags should be nested while sending an account balance read request from the external system. However, you should not seamlessly use this sample in your environment because the required pre-requisite data may not be available in your environment. In such case, the system will give erroneous results.

Sample Maintaining Advance Deposit at Parent Customer Level in XML Format

Using the below example, you can do the following:

- Maintain the advance deposit at parent customer level

The following table provides sample data where advance deposit is maintained at the parent customer level:

Advance Deposit Level	Person Type	Person Name	Policy Number	Plan Number	Advance Amount	Bill 1 Amount	Bill 2 Amount
PG	PARENT CUSTOMER	PETER_ INGRAM	REPRC_ IN_POL1	REPRC_ IN_POL1_ PLN1	2000	1500	500

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        <message></message>
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            <endDate></endDate>
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```

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```

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```

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```

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</schema>
```

Note: We have given the above sample to illustrate how the tags should be nested while sending an advance deposit creation request from the external system. However, you should not seamlessly use this sample in your environment because the required pre-requisite data may not be available in your environment. In such case, the system will give erroneous results.

Pricing Vs Passthrough Charges

Oracle Revenue Management and Billing enables you to view the difference (if any) between the calculated and passthrough benefit amount for a membership. It contains the following zone:

- Pricing Vs Passthrough Charges on page 3588

Note: For more information on how either the calculated benefit amount or passthrough benefit amount is billed for a membership, see Benefit Passthrough Charges vs. Calculated Charges on page 3506.

Pricing Vs Passthrough Charges

The**Pricing Vs Passthrough Charges** zone allows you to view the difference (if any) between the calculated and passthrough benefit amount of the membership for a coverage period. It contains the following two sections:

- **Search Criteria** - The **Search Criteria** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Membership ID	Used to search for coverage periods of a particular membership where the calculated and passthrough benefit amount is different. **Note:** The **Search** (🔍) icon appears corresponding to the **Membership ID** field. On clicking the **Search** icon, the **Search Membership** window appears. This field is applicable for both fully insured group and fully insured individual lines of business.	No

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Field Name	Field Description	Mandatory (Yes or No)
External Membership ID	Used to search for coverage periods of a membership with a particular external membership ID where the calculated and passthrough benefit amount is different. **Note:** This field is applicable for both fully insured group and fully insured individual lines of business.	No
Health Plan	Used to search for coverage periods of all memberships belonging to a particular health plan where the calculated and passthrough benefit amount is different. **Note:** The **Search** (🔍) icon appears corresponding to the **Health Plan** field. On clicking the **Search** icon, the **Health Plan Search** window appears. This field is applicable only for fully insured individual line of business.	No
Coverage Start Date	Used to search for coverage periods that begin on or after the specified date. **Note:** The coverage start date cannot be later than the coverage end date. You can either manually specify the date or select it using the **Date Picker** (📅) icon corresponding to the field.	Yes
Coverage End Date	Used to search for coverage periods that end on or before the specified date. **Note:** The coverage end date cannot be earlier than the coverage start date. You can either manually specify the date or select it using the **Date Picker** (📅) icon corresponding to the field.	Yes

Note:

You must specify at least the membership ID, external membership ID, or health plan while searching for discrepancies within the coverage period.

The coverage date range should neither be less than one month nor exceed beyond one year.

- **Search Results** - On clicking the **Search** button, the search results appear based on the specified search criteria. The **Search Results** section contains the following columns:

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Column Name	Column Description
Membership	Indicates the membership where there is difference between the calculated and passthrough benefit amount for the coverage period. **Note:** It has a link. On clicking the link, the **Membership** screen appears where you can view the details of the respective membership.
External Membership ID	Displays the corresponding membership ID which is maintained in the external source system.
Price Item	Indicates the price item using which the membership benefit charge is created for comparison.
Coverage Start Date	Displays the date from when the membership benefit coverage is effective.
Coverage End Date	Displays the date till when the membership benefit coverage is effective.
ORMB Calculated Amount	Displays the benefit amount calculated for the membership in the system.
Passthrough Amount	Displays the passthrough benefit amount received for the membership from the external system.
Difference	Displays the difference between the calculated and passthrough benefit amount.
Billable Charge Source	Indicates whether the billable charge is created using the calculated or passthrough benefit amount. The valid values are: • ORMB Calculated • Passthrough Charge
Billed Status	Indicates whether the billable charge is billed to the respective account. The valid values are: • Billed • Not Billed
Billable Charge	Indicates the billable charge created for the membership benefit. **Note:** It has a link. On clicking the link, the **Billable Charge** screen appears where you can view the details of the respective billable charge.

Note: Pagination is used to display limited number of records in the **Search Results** section. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

Related Topics

For more information on...	See...
How to view the discrepancy between the calculated and passthrough benefit amount for a membership	Viewing the Discrepancy between the Calculated and Passthrough Benefit Amount for a Membership on page 3590

Viewing the Discrepancy between the Calculated and Passthrough Benefit Amount for a Membership

Procedure

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To view the discrepancy between the calculated and passthrough benefit amount for a membership:

1. Click the **Menu** link in the **Application** toolbar.
   A list appears.
2. From the **Main** menu, select **Report and Inquiry** and then click **Pricing Vs Passthrough Charges**.
   The **Pricing Vs Passthrough Charges** screen appears.
3. Enter the search criteria in the **Pricing Vs Passthrough Charges** zone.

> **Note:** ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.

4. Click **Search**.
   The search results appear based on the specified search criteria.
5. View the difference between the calculated and passthrough benefit amount for the membership in the **Search Results** section.

Related Topics

For more information on...	See...
Pricing Vs Passthrough Charges screen	Pricing Vs Passthrough Charges on page 3588
Pricing Vs Passthrough Charges zone	Pricing Vs Passthrough Charges on page 3588

Billable Charge Creation or Cancellation through File Upload Interface

Until now, the system enabled you to create mass billable charges at once for the fully insured group and individual lines of business through the **Upload Request** feature. Now, in addition, the system enables you to create or cancel mass billable charges at once for the fully insured group and individual lines of business through the **File Upload Interface** feature.

A new file request type named **BCUPLD** is shipped with the product. It enables you do the following:

- Create a pass through or SQI based billable charge for an account for a particular coverage period. You can create the billable charges for the group and individual memberships.
- Cancel an existing billable charge of an account, thereby supporting billable charge reversal for a particular coverage period. You can then send the billable charge record with the appropriate corrections, if required.

> **Note:** At present, the **BCUPLD** file request type supports maximum five billable charge characteristics by default. However, you can update the **BCUPLD** file request type to support more than five billable charge characteristics based on the requirement.

You can upload and process a billable charge creation/reversal file in the CSV format using the **BCUPLD** file request type. The billable charge creation/reversal file should contain records with the following additional information apart from the basic details – Source System, Policy Number, Plan Number, Health Plan Code, Subscriber Identifier Type, Subscriber Identifier, Membership Type, External Membership ID.

When the contract ID is not specified, the system uses the source system, policy number, plan number, and price item combination to derive the contract against which the billable charge should be created for the group membership. Similarly, the system uses the health plan code and price item to derive the contract against which the billable charge

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should be created for the individual membership. And, when the **C1MMBRSH** characteristic is not specified in the billable charge record, the system uses either of the following to derive the group or individual membership:

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

If you want to cancel an existing billable charge, you need to set the **C1REVIND** characteristic type to **Y** corresponding to the billable charge record in the file. The system will then check whether a billable charge with the specified details already exist in the system. If so, the system will accordingly cancel the respective billable charge. Note that the billable charge reversal record should be sent with reversed amount (i.e., if the original charge amount was positive, then the reversal charge amount should be negative and vice-versa). To find a pass-through billable charge, the system uses the Coverage Period, Membership ID, Bill Line Level Sequence, Bill Line Level Amount, Billable Charge Status, Price Item, and Contract ID combination.

However, to find an SQI based billable charge, the system uses the Coverage Period, Membership ID, SQI Level Sequence, SQI Amount, Billable Charge Status, Price Item, and Contract ID combination. The system also enables you to specify reasons while creating or cancelling a billable charge. The reason indicates why you want to create or cancel a billable charge. Along with each reason, you can specify the following details:

- Sequence
- Priority
- Effective Date

The former two are mandatory whereas the latter one is non-mandatory. A new table named **CI_BILL_CHG_RSN** is introduced in this release to store the reasons for a billable charge. This reason is stored only for reporting purposes and is not displayed anywhere in the system. You can specify maximum 10 reasons for each billable charge record in the file.

On executing the **C1-FTRAN** batch, the system does the following:

- Creates a billable charge for the membership. It also stamps the respective membership ID as a characteristic on the billable charge.
- Cancels a billable charge where the **C1REVIND** characteristic type is set to **Y**.

Trigger Repricing on Deleting Derivation and Pricing Parameters of a Bill Group

Until now, you were able to delete the derivation and pricing parameters of a bill group from the user interface. But repricing was not triggered on the deletion. Now, on deleting a derivation and pricing parameters combination of a bill group, the system changes the status of the derivation and pricing parameters combination to **Inactive**. In addition, if the audit event process is configured for the **C1-BillLevel** business object, the system creates an audit event with the audit action set to **Change Row**.

On executing the **C1-CBIPR** batch, the system creates a repricing entity detail record for the audit event in the **CI_REPRC_ENTITY_DTL** table. While repricing, you need to execute the following batches in the specified sequence:

1. C1-FIBLR
2. C1-FIMRE
3. C1-CBIPR
4. C1-FIMRC
5. C1-REPC1
6. C1-REPC2
7. C1-REPC3
8. C1-FIBCR

Once the repricing entity detail record is created for the audit event, you need to execute the **C1-FIMRC** batch. It will delete the inactivated derivation and pricing parameters combination (that was earlier deleted from the user interface)

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from the system. If the deleted derivation and pricing parameters combination was referred for billing any memberships in the system, you need to ensure that those memberships are appropriately billed to a new bill group and do not remain unbilled in the system.

Note: The **C1-CBIPR** and **C1-FIMRC** batches and **C1-REAUDEVNT** algorithm are enhanced to implement this feature.

Health Check

Oracle Revenue Management and Billing facilitates the system health check for insurance companies. It enables you to do the following through the **Health Check** screen:

- Perform duplicate data integrity check
- View the errors generated while creating or processing the inbound messages
- View the non-billed memberships
- View the memberships with non-billed sponsor charges
- View the bill segments generated beyond charge end date
- View the canceled memberships with one-day billable charge

At present, the system supports duplicate data integrity check for the following entities through the **Health Check** screen - **Policy**, **Policy Plan**, **Membership**, **Membership Person**, **Billable Charge**, and **Bill Segment**. The **Health Check** screen is tested and certified for the fully insured group and fully insured individual lines of business. It contains the following zones:

- Duplicate Entity on page 3593
- Membership without Sponsor Billable Charge on page 3601
- Bill Segments beyond Billable Charge End Date on page 3604
- Membership Not Billed on page 3605
- Error Messages Count in Inbound Message on page 3607
- Inbound Message List on page 3608
- Cancelled Memberships with One Day Billable Charge on page 3609
- Error Messages in Inbound Message on page 3611

Duplicate Entity

The **Duplicate Entity** zone allows you to view the duplicate records of various entities within the given date range. It contains the following sections:

- **Search Criteria** - The **Search Criteria** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Entity	Used to indicate the entity for which you want to view duplicate records within the given date range. The valid values are: • Bill Segment • Billable Charges • Membership • Membership Person • Policy • Policy Plan	Yes

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Field Name	Field Description	Mandatory (Yes or No)
Start Date	Used to specify the date from when you want to search the duplicate records. **Note:** The start date cannot be later than the end date. You can either manually specify the date or select it using the **Date Picker** ( ) icon corresponding to the field.	Yes
End Date	Used to specify the date till when you want to search the duplicate records. **Note:** The end date cannot be earlier than the start date. You can either manually specify the date or select it using the **Date Picker** ( ) icon corresponding to the field.	Yes

- **Search Results** - On clicking the **Search** button, the search results appear based on the specified search criteria. The columns in the **Search Results** section vary depending on the selected entity. For more information about the columns, you can refer to the respective section listed in **Related Topics**.

Related Topics

For more information on...	See...
How to search for duplicate bill segments	Searching for Duplicate Bill Segments on page 3594
How to search for duplicate billable charges	Searching for Duplicate Billable Charges on page 3595
How to search for duplicate memberships	Searching for Duplicate Memberships on page 3596
How to search for duplicate member persons	Searching for Duplicate Member Persons on page 3598
How to search for duplicate policies	Searching for Duplicate Policies on page 3599
How to search for duplicate policy plans	Searching for Duplicate Policy Plans on page 3600

Searching for Duplicate Bill Segments

Duplicate bill segments are those bill segments which meet the following conditions:

- The status of the bill segments is set to **Frozen**.
- The **Show on Bill** flag on the bill segments is set to **True**.
- The membership and price item combination for which the bill segments are created is same.
- The bill segments have either same or overlapping date range.

Procedure

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To search for duplicate bill segments:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, click **H** and then click **Health Check**.
   The **Health Check** screen appears.
3. Expand the **Duplicate Entity** zone.
4. Select the **Bill Segment** option from the **Entity** list.
5. Select the date range to retrieve the bill segments which are duplicate within the given period.

> **Note:** The specified date range should not exceed one year. For example, if the start date is 01-01-2025, then the end date cannot be later than 12-31-2025.

6. Click **Search**.

   The search results appear based on the specified search criteria. The **Search Results** section contains the following columns:

Column Name	Column Description
Bill Segment	Displays information about the bill segment. In addition, a context menu (⊙) icon appears corresponding to this field which helps in navigating to other screens in the application.
	Note: It has a link. On clicking the link, the **Bill Segment** screen appears where you can view the details of the respective bill segment.
Membership	Indicates the group or individual membership for which the bill segment is created.
	Note: It has a link. On clicking the link, the **Membership** screen appears where you can view the details of the respective membership.
Start Date	Displays the start date of the bill segment.
End Date	Displays the end date of the bill segment.
Price Item	Indicates the price item for which the respective billable charge is created.
	Note: It has a link. On clicking the link, the **Price Item** screen appears where you can view the details of the respective price item.
Current Amount	Displays the bill segment amount.

> **Note:** Pagination is used to display limited number of records in the **Search Results** section. You can use the navigation links, such as **Previous** and **Next** to navigate between pages. Note that the navigation links appear in the **Search Results** section only when the records in the search results exceed 20.

Related Topics

For more information on...	See...
Duplicate Entity zone	Duplicate Entity on page 3593

Searching for Duplicate Billable Charges

Duplicate billable charges are those billable charges which meet the following conditions:

- The status of the billable charges is set to **Billable**.

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- The membership and price item combination for which the billable charges are created is same.
- The billable charges have either same or overlapping date range.

Procedure

To search for duplicate billable charges:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, click **H** and then click **Health Check**.
   The **Health Check** screen appears.
3. Expand the **Duplicate Entity** zone.
4. Select the **Billable Charges** option from the **Entity** list.
5. Select the date range to retrieve the bill charges which are duplicate within the given period.

Note: The specified date range should not exceed one year. For example, if the start date is 01-01-2025, then the end date cannot be later than 12-31-2025.

6. Click **Search**

   The search results appear based on the specified search criteria. The **Search Results** section contains the following columns:

Column Name	Column Description
Billable Charge	Displays information about the billable charge.
	Note: It has a link. On clicking the link, the **Billable Charge** screen appears where you can view the details of the respective billable charge.
Membership	Indicates the group or individual membership for which the billable charge is created.
	Note: It has a link. On clicking the link, the **Membership** screen appears where you can view the details of the respective membership.
Start Date	Displays the start date of the billable charge.
End Date	Displays the end date of the billable charge.
Price Item	Indicates the price item for which the billable charge is created.
	Note: It has a link. On clicking the link, the **Price Item** screen appears where you can view the details of the respective price item.
Creation Date	Displays the date when the billable charge is created.

Note: Pagination is used to display limited number of records in the **Search Results** section. You can use the navigation links, such as **Previous** and **Next** to navigate between pages. Note that the navigation links appear in the **Search Results** section only when the records in the search results exceed 20.

Related Topics

For more information on...	See...
Duplicate Entity zone	Duplicate Entity on page 3593

Searching for Duplicate Memberships

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Duplicate memberships are those memberships which meet the following conditions:

- The status of the memberships is set to **Active**.
- The external membership ID, membership type, and health plan are same for the individual memberships, or the external membership ID, membership type, policy, and policy plan are same for the group memberships, respectively.
- The member persons included in the memberships are identical.
- The memberships have either same or overlapping date range.

Procedure

To search for duplicate memberships:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, click **H** and then click **Health Check**.
   The **Health Check** screen appears.
3. Expand the **Duplicate Entity** zone.
4. Select the **Membership** option from the **Entity** list.
5. Select the date range to retrieve the memberships which are duplicate within the given period.

   Note: The specified date range should not exceed one year. For example, if the start date is 01-01-2025, then the end date cannot be later than 12-31-2025.
6. Click **Search**.

   The search results appear based on the specified search criteria. The **Search Results** section contains the following columns:

Column Name	Column Description
Membership	Displays information about the group or individual membership. **Note:** It has a link. On clicking the link, the **Membership** screen appears where you can view the details of the respective membership.
Start Date	Displays the date from when the group or individual membership is effective.
End Date	Displays the date till when the group or individual membership is effective.
Create Date/Time	Displays the date when the group or individual membership is created.
Policy	Indicates the policy in which group membership is covered. **Note:** It has a link. On clicking the link, the **Policy** screen appears where you can view the details of the respective policy.
Policy Plan	Indicates the policy plan for which the group membership is created. **Note:** It has a link. On clicking the link, the **Policy Plan** screen appears where you can view the details of the respective policy plan.
Health Plan	Indicates the health plan for which the individual membership is created. **Note:** It has a link. On clicking the link, the **Health Plan 360° Information** screen appears where you can view the details of the respective health plan.
Person	Indicates the main subscriber of the group or individual membership. In addition, a context menu (⊙) icon appears corresponding to this field which helps in navigating to other screens in the application.

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Column Name	Column Description
	Note: It has a link. On clicking the link, the **Person** screen appears where you can view the details of the respective person.

Note: Pagination is used to display limited number of records in the **Search Results** section. You can use the navigation links, such as **Previous** and **Next** to navigate between pages. Note that the navigation links appear in the **Search Results** section only when the records in the search results exceed 20.

Related Topics

For more information on...	See...
Duplicate Entity zone	Duplicate Entity on page 3593

Searching for Duplicate Member Persons

Duplicate member persons are those member persons which meet the following conditions:

- The same member person is added multiple times in the same membership.
- The same member persons have either same or overlapping date range.

Procedure

To search for duplicate member persons:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, click **H** and then click **Health Check**.
   The **Health Check** screen appears.
3. Expand the **Duplicate Entity** zone.
4. Select the **Membership Person** option from the **Entity** list.
5. Select the date range to retrieve the member persons which are duplicate within the given period.

Note: The specified date range should not exceed one year. For example, if the start date is 01-01-2025, then the end date cannot be later than 12-31-2025.

6. Click **Search**.

   The search results appear based on the specified search criteria. The **Search Results** section contains the following columns:

Column Name	Column Description
Membership	Indicates the group or individual membership in which the member person is added multiple times.
	Note: It has a link. On clicking the link, the **Membership** screen appears where you can view the details of the respective membership.
Person	Displays information about the member person. In addition, a context menu (⊙) icon appears corresponding to this field which helps in navigating to other screens in the application.
	Note: It has a link. On clicking the link, the **Person** screen appears where you can view the details of the respective person.

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Column Name	Column Description
Start Date	Displays the date from when the person is included in the membership.
End Date	Displays the date till when the person is included in the membership.
Member Person Status	Indicates the status of the person in the membership. The valid values are: • Active • Inactive • Canceled • Pending Effectuation
Relationship Type	Indicates how the person is related to the main subscriber of the membership.

Note: Pagination is used to display limited number of records in the **Search Results** section. You can use the navigation links, such as **Previous** and **Next** to navigate between pages. Note that the navigation links appear in the **Search Results** section only when the records in the search results exceed 20.

Related Topics

For more information on...	See...
Duplicate Entity zone	Duplicate Entity on page 3593

Searching for Duplicate Policies

Duplicate policies are those policies which meet the following conditions:

- The status of the policies is set to **In Force/Active**.
- The policy number and source system of the policies are same.
- The policies have either same or overlapping date range.

Procedure

To search for duplicate policies:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, click **H** and then click **Health Check**.
   The **Health Check** screen appears.
3. Expand the **Duplicate Entity** zone.
4. Select the **Policy** option from the **Entity** list.
5. Select the date range to retrieve the policies which are duplicate within the given period.

   Note: The specified date range should not exceed one year. For example, if the start date is 01-01-2025, then the end date cannot be later than 12-31-2025.
6. Click **Search**.

   The search results appear based on the specified search criteria. The **Search Results** section contains the following columns:

Column Name	Column Description
Policy Number	Indicates the policy number.
Policy	Displays information about the policy.

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Column Name	Column Description
	Note: It has a link. On clicking the link, the **Policy** screen appears where you can view the details of the respective policy.
Source System	Indicates the external system from where the policy information is received.
Start Date	Displays the date from when the policy is effective.
End Date	Displays the date till when the policy is effective.
Create Date/Time	Displays the date and time when the policy is created in the system.

Note: Pagination is used to display limited number of records in the **Search Results** section. You can use the navigation links, such as **Previous** and **Next** to navigate between pages. Note that the navigation links appear in the **Search Results** section only when the records in the search results exceed 20.

Related Topics

For more information on...	See...
Duplicate Entity zone	Duplicate Entity on page 3593

Searching for Duplicate Policy Plans

Duplicate policy plans are those policy plans which meet the following conditions:

- The status of the policy plans is set to **Active**.
- The plan number, policy number, and source system specified in the policy plans are same.
- The policy plans have either same or overlapping date range.

Procedure

To search for duplicate policy plans:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, click **H** and then click **Health Check**.
   The **Health Check** screen appears.
3. Expand the **Duplicate Entity** zone.
4. Select the **Policy Plan** option from the **Entity** list.
5. Select the date range to retrieve the policy plans which are duplicate within the given period.

   Note: The specified date range should not exceed one year. For example, if the start date is 01-01-2025, then the end date cannot be later than 12-31-2025.
6. Click **Search**.

   The search results appear based on the specified search criteria. The **Search Results** section contains the following columns:

Column Name	Column Description
Plan Number	Indicates the plan number.
Policy Plan	Displays information about the policy plan.
	Note: It has a link. On clicking the link, the **Policy Plan** screen appears where you can view the details of the respective policy plan.

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Column Name	Column Description
Policy	Indicates the policy for which the policy plan is created. **Note:** It has a link. On clicking the link, the **Policy** screen appears where you can view the details of the respective policy.
Start Date	Displays the date from when the policy plan is effective.
End Date	Displays the date till when the policy plan is effective.

Note: Pagination is used to display limited number of records in the **Search Results** section. You can use the navigation links, such as **Previous** and **Next** to navigate between pages. Note that the navigation links appear in the **Search Results** section only when the records in the search results exceed 20.

Related Topics

For more information on...	See...
Duplicate Entity zone	Duplicate Entity on page 3593

Membership without Sponsor Billable Charge

The **Membership without Sponsor Billable Charge** zone enables you to view all the memberships for which the benefit sponsor charges are not yet created in the system. It contains the following sections:

- **Search Criteria** - The **Search Criteria** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Price Item	Used to specify the price item. **Note:** The system derives the billable charges which are created for the specified price item. Once the billable charges are derived, the system determines the memberships for which these billable charges are created in the system. The **Search** (🔍) icon appears corresponding to the **Price Item** field. On clicking the **Search** icon, the **Price Item Search** window appears.	Yes
Benefit Sponsor Price Item	Used to specify the price item using which a billable charge is created for the membership benefit on the sponsor account.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	Note: Once the memberships are derived using the price item (as mentioned in the above note), the system then checks whether the given benefit sponsor price item is specified in the respective membership benefit sub type to create membership benefit billable charges on the sponsor account. If so, the system then checks whether the membership benefit sponsor charges are created for the respective memberships on the sponsor account. If the membership benefit charges are not yet created for the memberships on the sponsor account, the system will list such memberships in this zone. The **Search** (🔍) icon appears corresponding to the **Benefit Sponsor Price Item** field. On clicking the **Search** icon, the **Price Item Search** window appears.	
Membership Category	Used to filter the memberships based on its category. The valid values are: • Group Membership • Individual Membership	No
Start Date	Used to search the membership billable charges whose start date is on or after the specified date. **Note:** The start date cannot be later than the end date. You can either manually specify the date or select it using the **Date Picker** (📅) icon corresponding to the field.	No
End Date	Used to search the membership billable charges whose end date is on or before the specified date. **Note:** The end date cannot be earlier than the start date. You can either manually specify the date or select it using the **Date Picker** (📅) icon corresponding to the field.	No

- **Search Results** - On clicking the **Search** button, the search results appear based on the specified search criteria. The **Search Results** section contains the following columns:

Column Name	Column Description
Membership	Indicates the group or individual membership for which the billable charge is created. **Note:** It has a link. On clicking the link, the **Membership** screen appears where you can view the details of the respective membership.
Billable Charge	Indicates the billable charge which is created using the given price item.

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Column Name	Column Description
	Note: It has a link. On clicking the link, the **Billable Charge** screen appears where you can view the details of the respective billable charge.
Start Date	Displays the start date of the billable charge.
End Date	Displays the end date of the billable charge.
Price Item	Displays the information about the price item.
	Note: It has a link. On clicking the link, the **Price Item** screen appears where you can view the details of the respective price item.
Creation Date	Displays the date when the billable charge is created.

Related Topics

For more information on...	See...
How to view the memberships without sponsor billable charges	Viewing the Memberships without Sponsor Billable Charges on page 3603

Viewing the Memberships without Sponsor Billable Charges

Prerequisites

To view the memberships without sponsor billable charges, you should have:

- Price items defined in the application

Procedure

To view the memberships without sponsor billable charges:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, click **H** and then click **Health Check**.
   The **Health Check** screen appears.
3. Expand the **Membership without Sponsor Billable Charge** zone.
4. Select the price item and benefit sponsor price item from the respective fields.
5. Enter the additional filter criteria in the **Membership without Sponsor Billable Charge** zone.

   Note: The specified date range should not exceed one year. For example, if the start date is 01-01-2025, then the end date cannot be later than 12-31-2025.
6. Click **Search**.
   The memberships where the membership benefit charges are yet to be created on the sponsor account are listed in the **Search Results** section.

   Note: Pagination is used to display limited number of records in the **Search Results** section. You can use the navigation links, such as **Previous** and **Next** to navigate between pages. Note that the navigation links appear in the **Search Results** section only when the records in the search results exceed 20.

Related Topics

For more information on...	See...
Membership without Sponsor Billable Charge zone	Membership without Sponsor Billable Charge on page 3601

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Bill Segments beyond Billable Charge End Date

The **Bill Segments beyond Billable Charge End Date** zone enables you to view all the frozen bill segments which are generated beyond the end date of the respective billable charge. It contains the following sections:

- **Search Criteria** - The **Search Criteria** section contains the following field:

Field Name	Field Description	Mandatory (Yes or No)
Price Item	Used to search for the bill segments which are generated for a particular price item. **Note:** The **Search** (🔍) icon appears corresponding to the **Price Item** field. On clicking the **Search** icon, the **Price Item Search** window appears.	No

- **Search Results** - On clicking the **Search** button, the search results appear based on the specified search criteria. The **Search Results** section contains the following columns:

Column Name	Column Description
Bill Segment Information	Displays information about the bill segment. In addition, a context menu (⊙) icon appears corresponding to this field which helps in navigating to other screens in the application. **Note:** It has a link. On clicking the link, the **Billable Segment** screen appears where you can view the details of the respective bill segment.
Billable Charge	Indicates the billable charge for which the bill segment is generated. **Note:** It has a link. On clicking the link, the **Billable Charge** screen appears where you can view the details of the respective billable charge.
Membership	Indicates the group or individual membership for which the billable charge is created. **Note:** It has a link. On clicking the link, the **Membership** screen appears where you can view the details of the respective membership.
Account ID	Indicates the account for which the bill segment is created.

Related Topics

For more information on...	See...
How to view the bill segments generated beyond the billable charge end date	Viewing the Bill Segments Generated beyond the Billable Charge End Date on page 3604

Viewing the Bill Segments Generated beyond the Billable Charge End Date

Prerequisites

To view the bill segments generated beyond the billable charge end date, you should have:

- Price items defined in the application

Procedure

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To view the bill segments generated beyond the billable charge end date:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, click **H** and then click **Health Check**.
   The **Health Check** screen appears.
3. Expand the **Bill Segments beyond Billable Charge End Date** zone.
4. Enter the search criteria in the **Bill Segments beyond Billable Charge End Date** zone.
5. Click **Search**.
   The bill segments which are generated beyond the billable charge end date are listed in the **Search Results** section.

> **Note:** Pagination is used to display limited number of records in the **Search Results** section. You can use the navigation links, such as **Previous** and **Next** to navigate between pages. Note that the navigation links appear in the **Search Results** section only when the records in the search results exceed 20.

Related Topics

For more information on...	See...
Bill Segments beyond Billable Charge End Date zone	Bill Segments beyond Billable Charge End Date on page 3604

Membership Not Billed

The **Membership Not Billed** zone enables you to view all the memberships which are due for billing for the specified month and year but are not yet billed on the accounting date as per the respective account's bill cycle. It contains the following sections:

- **Search Criteria** - The **Search Criteria** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Month	Used to indicate the month for which you want to view the memberships that are due for billing. The valid values are: • Jan • Feb • Mar • Apr • May • Jun • Jul • Aug • Sep • Oct • Nov • Dec	Yes
Year	Used to specify the year for which you want to view the memberships that are due for billing.	Yes
Membership Category	Used to filter the memberships based on its category. The valid values are: • Group Membership	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	• Individual Membership	
Sponsor Account	Used to indicate whether you want to search the memberships which are not yet billed on the sponsor or non-sponsor (i.e., membership) account. The valid values are: • Yes • No	No

- **Search Results** - On clicking the **Search** button, the search results appear based on the specified search criteria. The **Search Results** section contains the following column:

Column Name	Column Description
Membership	Displays information about the membership. Note that the system fetches those memberships that meet the search criteria and whose accounting date on the respective account's bill cycle is earlier than the system date.
	Note: It has a link. On clicking the link, the **Membership** screen appears where you can view the details of the respective membership.

Related Topics

For more information on...	See...
How to view the non-billed memberships	Viewing the Non-Billed Memberships on page 3606

Viewing the Non-Billed Memberships

Procedure

To view the non-billed memberships:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, click **H** and then click **Health Check**.
   The **Health Check** screen appears.
3. Expand the **Membership Not Billed** zone.
4. Select the month and year for which you want to view the non-billed memberships from the respective fields.
5. Select the **Group Membership** or **Individual Membership** option from the **Membership Category** list.
6. Enter the additional search criteria in the **Membership Not Billed** zone.
7. Click **Search**.
   A list of memberships that meet the search criteria and whose accounting date on the respective account's bill cycle is earlier than the system date appears in the **Search Results** section.

Note: Pagination is used to display limited number of records in the **Search Results** section. You can use the navigation links, such as **Previous** and **Next** to navigate between pages. Note that the navigation links appear in the **Search Results** section only when the records in the search results exceed 20.

Related Topics

For more information on...	See...
Membership Not Billed zone	Membership Not Billed on page 3605

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Error Messages Count in Inbound Message

The **Error Messages Count in Inbound Message** zone enables you to view the number of instances (i.e., count) of the error that occurred while creating or processing different inbound messages. The system considers errors of the inbound messages which are created within the specified date range and are in the **Pending** or **Rejected** status. It contains the following sections:

- **Search Criteria** - The **Search Criteria** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Creation From Date	Used to search for the inbound messages which are created on or after the specified date. **Note:** The creation from date cannot be later than the creation to date. You can either manually specify the date or select it using the **Date Picker** ( ) icon corresponding to the field.	Yes
Created To	Used to search for the inbound messages which are created on or before the specified date. **Note:** The creation to date cannot be earlier than the creation from date. You can either manually specify the date or select it using the **Date Picker** ( ) icon corresponding to the field.	Yes

- **Search Results** - On clicking the **Search** button, the search results appear based on the specified search criteria. The **Search Results** section contains the following columns:

Column Name	Column Description
Count	Indicates the number of instances (i.e., count) of the error that occurred while creating or processing different inbound messages.
Message Category	Indicates the message category to which the error message belongs.
Message Number	Displays the message number of the error message.
Message Text	Displays the error message.

On clicking the **Broadcast** ( ) icon corresponding to an error message, the **Inbound Message List** zone appears where you can view the inbound messages where the respective error has occurred.

Related Topics

For more information on...	See...
How to view the number of errors generated through inbound messages	Viewing the Number of Errors Generated through Inbound Messages on page 3607

Viewing the Number of Errors Generated through Inbound Messages

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Procedure

To view the number of errors generated through the inbound messages:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, click **H** and then click **Health Check**.
   The **Health Check** screen appears.
3. Expand the **Error Messages Count in Inbound Message** zone.
4. Enter the search criteria in the **Error Messages Count in Inbound Message** zone.

> **Note:** The specified date range should not exceed one year. For example, if the start date is 01-01-2025, then the end date cannot be later than 12-31-2025.

5. Click **Search**.
   The error message that occurred while creating or processing different inbound messages along with its instances (i.e., count) appears in the **Search Results** section.

> **Note:** Pagination is used to display limited number of records in the **Search Results** section. You can use the navigation links, such as **Previous** and **Next** to navigate between pages. Note that the navigation links appear in the **Search Results** section only when the records in the search results exceed 20.

Related Topics

For more information on...	See...
Error Messages Count in Inbound Message zone	Error Messages Count in Inbound Message on page 3607

Inbound Message List

The **Inbound Message List** zone enables you to view the inbound messages where the respective error has occurred. It contains the following columns:

Column Name	Column Description
Create Date/Time	Displays the date and time when the inbound message is created in the system.
Status	Indicates the status of the inbound message. The valid values are: • Pending • Rejected
Inbound Message Information	Displays information about the inbound message. **Note:** It has a link. On clicking the link, the **Inbound Message** screen appears where you can view the details of the respective inbound message.
Details	Indicates the error that occurred while creating or processing the inbound message.
Message Category	Indicates the message category to which the error message belongs.
Message Number	Displays the message number of the error message.
External Source ID	Indicates the external source system from where the inbound message is received.
External Batch ID	Indicates the batch job of the external source system through which the inbound message is created.

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By default, the **Inbound Message List** zone does not appear in the **Health Check** screen. It appears when you click the **Broadcast** (ᯤ) icon corresponding to the error message in the **Error Messages Count in Inbound Message** zone.

Related Topics

For more information on...	See...
How to view the inbound messages with specific error instances	Viewing the Inbound Messages with Specific Error Instances on page 3609

Viewing the Inbound Messages with Specific Error Instances

Procedure

To view the inbound messages where a specific error has occurred:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, click **H** and then click **Health Check**.
   The **Health Check** screen appears.
3. Expand the **Error Messages Count in Inbound Message** zone.
4. Enter the search criteria in the **Error Messages Count in Inbound Message** zone.

> **Note:** The specified date range should not exceed one year. For example, if the start date is 01-01-2025, then the end date cannot be later than 12-31-2025.

5. Click **Search**.
   The error message that occurred while creating or processing different inbound messages along with its instances (i.e., count) appears in the **Search Results** section.
6. In the **Error Messages Count in Inbound Message** zone, click the **Broadcast** (ᯤ) icon corresponding to the error message whose instances in different inbound messages you want to view.
   The **Inbound Message List** zone appears.
7. View the inbound messages where the respective error has occurred in the **Inbound Message List** zone.

> **Note:** Pagination is used to display limited number of records in the **Search Results** section. You can use the navigation links, such as **Previous** and **Next** to navigate between pages. Note that the navigation links appear in the **Search Results** section only when the records in the search results exceed 20.

Related Topics

For more information on...	See...
Error Messages Count in Inbound Message zone	Error Messages Count in Inbound Message on page 3607
Inbound Message List zone	Inbound Message List on page 3608

Cancelled Memberships with One Day Billable Charge

The **Cancelled Memberships with One Day Billable Charge** zone enables you to view all the cancelled memberships which are created within the specified date range and for which one-day billable charge exists in the system. It contains the following sections:

- **Search Criteria** - The **Search Criteria** section contains the following fields:

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Field Name	Field Description	Mandatory (Yes or No)
Start Date	Used to search for the cancelled memberships which are created on or after the specified date. **Note:** The start date cannot be later than the end date. You can either manually specify the date or select it using the **Date Picker** () icon corresponding to the field.	Yes
End Date	Used to search for the cancelled memberships which are created on or before the specified date. **Note:** The end date cannot be earlier than the start date. You can either manually specify the date or select it using the **Date Picker** () icon corresponding to the field.	Yes

- **Search Results** - On clicking the **Search** button, the search results appear based on the specified search criteria. The **Search Results** section contains the following columns:

Column Name	Column Description
Membership	Displays information about the membership. Note that the system fetches those memberships that meet the search criteria and for which a billable charge is created for a day (i.e. with the same start and end dates). **Note:** It has a link. On clicking the link, the **Membership** screen appears where you can view the details of the respective membership.
Billable Charge	Displays information about the billable charge. **Note:** It has a link. On clicking the link, the **Billable Charge** screen appears where you can view the details of the respective billable charge.
Billable Charge ID	Indicates the one-day billable charge which is created for the membership.
Start Date	Displays the start date of the billable charge.
End Date	Displays the end date of the billable charge.

Related Topics

For more information on...	See...
How to view the cancelled memberships with one-day billable charge	Viewing the Cancelled Memberships with One-Day Billable Charge on page 3610

Viewing the Cancelled Memberships with One-Day Billable Charge

Procedure

To view the cancelled memberships with one-day billable charge:

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1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, click **H** and then click **Health Check**.
   The **Health Check** screen appears.
3. Expand the **Cancelled Memberships with One Day Billable Charge** zone.
4. Enter the search criteria in the **Cancelled Memberships with One Day Billable Charge** zone.

> **Note:** The specified date range should not exceed one year. For example, if the start date is 01-01-2025, then the end date cannot be later than 12-31-2025.

5. Click **Search**.
   A list of cancelled memberships which have one-day billable charge appears in the **Search Results** section.

> **Note:** Pagination is used to display limited number of records in the **Search Results** section. You can use the navigation links, such as **Previous** and **Next** to navigate between pages. Note that the navigation links appear in the **Search Results** section only when the records in the search results exceed 20.

Related Topics

For more information on...	See...
Cancelled Memberships with One Day Billable Charge zone	Cancelled Memberships with One Day Billable Charge on page 3609

Error Messages in Inbound Message

The **Error Messages in Inbound Message** zone enables you to view the errors that occurred while creating or processing the inbound messages. Note that you can view the errors of the inbound messages which are in the **Pending** or **Rejected** status. It contains the following sections:

- **Search Criteria** - The **Search Criteria** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Inbound Message Status	Used to search the errors of the inbound messages which are in a particular status. The valid values are: • Pending • Rejected	No
External Source ID	Used to search the errors of the inbound messages which are received from a particular external source system.	No
Creation From Date	Used to search the errors of the inbound messages which are created from a particular date onwards. **Note:** The creation from date cannot be later than the creation to date. You can either manually specify the date or select it using the **Date Picker** ( ) icon corresponding to the field.	Yes
Created To	Used to search the errors of the inbound messages which are created till a particular date.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The creation to date cannot be earlier than the creation from date. You can either manually specify the date or select it using the **Date Picker** ( ) icon corresponding to the field.	

- **Search Results** - On clicking the **Search** button, the search results appear based on the specified search criteria. The **Search Results** section contains the following columns:

Column Name	Column Description
Create Date/Time	Displays the date and time when the inbound message is created in the system.
Status	Indicates the status of the inbound message. The valid values are: • Pending • Rejected
Inbound Message Information	Displays information about the inbound message.
	Note: It has a link. On clicking the link, the **Inbound Message** screen appears where you can view the details of the respective inbound message.
Details	Indicates the error that occurred while creating or processing the inbound message.
Message Category	Indicates the message category to which the error message belongs.
Message Number	Displays the message number of the error message.
External Source ID	Indicates the external source system from where the inbound message is received.
External Batch ID	Indicates the batch job of the external source system through which the inbound message is created.

Related Topics

For more information on...	See...
How to view the errors of the inbound messages	Viewing the Errors of the Inbound Messages on page 3612

Viewing the Errors of the Inbound Messages

Procedure

To view the errors of the inbound messages:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, click **H** and then click **Health Check**.
   The **Health Check** screen appears.
3. Expand the **Error Messages in Inbound Message** zone.
4. Enter the search criteria in the **Error Messages in Inbound Message** zone.

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> **Note:** The specified date range should not exceed one year. For example, if the start date is 01-01-2025, then the end date cannot be later than 12-31-2025.

5. Click **Search**.
   A list of inbound messages with errors appears in the **Search Results** section.

> **Note:** Pagination is used to display limited number of records in the **Search Results** section. You can use the navigation links, such as **Previous** and **Next** to navigate between pages. Note that the navigation links appear in the **Search Results** section only when the records in the search results exceed 20.

Related Topics

For more information on...	See...
Error Messages in Inbound Message zone	Error Messages in Inbound Message on page 3611

Split Dependent Person Coverage

Until now, when a member person data was received on reinstating a membership, the system created a new record for the dependent person with the **Active** status instead of updating the old inactive record. However, if a dependent person was active for a particular coverage period (for example, Jan 2025 to Mar 2025) and then reenrolled in the same membership for a different coverage period (for example, Jun 2025 to Dec 2025), the system did not allow to create a new record for the dependent person with the **Active** status. Instead, the system tried to update the existing record and thereby failed as the start date of coverage period was different.

To support multiple coverage period scenarios for a dependent person, the upstream system needs to send the full coverage snapshot for the dependent person. For example, if DP1 was enrolled in M1 from Jan 2025 to Mar 2025 and then reenrolled in M1 from Jun 2025 to Dec 2025, you need to send two records on reenrolment for the same member person in the **Active** status – one with the coverage period Jan 2025 to Mar 2025 and another with the coverage period Jun 2025 to Dec 2025.

Note that if the newborn is end dated and then reenrolled within the gift days period, then the newborn will still be eligible for original gift days discount on reenrolment. For example, let's assume that a newborn is enrolled on 1st May with gift days 31. This means his gift days period is from 1st May to 31st May. Now, if the newborn enrolment is ended on 5th May and then reenrolled from 15th May, the newborn would still be eligible for the gift days till 31st May.

Similarly, if you want to cancel a particular coverage period record of a member person (for example Jun 2025 to Dec 2025) and enroll the member person for a new coverage period (i.e. May 2025 to Dec2025), you need to send the full coverage snapshot of the dependent person along with the cancellation record. For example, if DP1 was enrolled in M1 for two coverage periods - Jan 2025 to Mar 2025 and Jun 2025 to Dec 2025 and if you want to change the coverage period Jun 2025 to Dec 2025 to May 2025 to Dec 2025, you need to send three records for the same member person in the specified sequence through the same inbound message:

1. One record in the **Active** status with the coverage period Jan 2025 to Mar 2025
2. Another record in the **Canceled** status with the coverage period Jun 2025
3. Third record in the **Active** status with the coverage period May 2025 to Dec 2025

The specified sequence helps to address any erroneous results. Note that the split dependent person coverage feature is applicable for the fully insured group and fully insured individual lines of business.

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Automatic Hold Request Creation Via File Upload Interface

Oracle Revenue Management and Billing provides the ability to automatically create a hold request when a billable charge creation or cancelation fails for an account through the **File Upload Interface** feature. Note that an automatic hold request is created only when the **Create Premium Hold Request** attribute of the hold request preference is set to **Yes**. The system considers the hold request preference which is specified in the **Hold Request Field Mapping** option type of the **C1-HOLDSRCH** feature configuration.

To enable the automatic hold request creation via file upload interface, you need to attach an algorithm created using the **C1-HRFRT** algorithm type to the **Post-Processing** system event of the **C1-FTRAN** batch control. If an error occurs while creating or canceling a billable charge for an account, the system automatically holds only the bill generation process of the account by creating a hold request.

While creating an automatic hold request, the system uses the following attributes of the hold request preference:

- Default Automatic Hold Reason
- Default Automatic End Date
- Default Automatic Hold Request Type Code

The system sets the hold request start date to the system date. The hold request is created in the **Active** status. The hold process in the hold request is set to **Bill Generation** and the hold process and hold entity start and end dates are set to the hold request start and end dates, respectively. The bill after date is set for the accounts on the **C1-HLMON** batch execution.

Note that the system creates one hold request for all the accounts of a file for which billable charge creation or cancelation failed on executing the **C1-FTRAN** batch.

Note:

You can manually release an automatic hold request from the user interface or through an inbound message.

The approval process for hold request is not supported in this feature. Therefore, we recommend you to use a hold request type where the **Activation Approval** option is not selected.

This feature is tested and certified for both the fully insured group and fully insured individual lines of business.

Consider Zero or Negative Bills for Paid Through Date

There might be scenarios where the zero or negative amount bills may be generated for an account to which an individual membership is billed and no payments are expected from such accounts. In such case, until now, the system did not update paid through date when zero or negative amount bill was created for an individual membership. Now, when the zero or negative amount bill is created for an account to which an individual membership is billed, the system also creates an entry for such account in the **F1_GEN_PROC** table and stamps the **PTDIND** batch control against it. The **C1-CLCPTDIND** algorithm is enhanced to consider zero or negative amount bill for the accounts. It then accordingly determines last billed coverage end date and calculates the paid through date of the account. Therefore, now, on executing the **PTDIND** batch, the system accordingly updates the paid through date of the account considering its zero or negative amount bills.

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Display Non-Eligible Members' Premium Calculation Lines

Until now, the system did not consider members who are beyond maximum allowed dependent limit for age based premium calculation and therefore no calculation lines were created for such non-eligible members. Now, the system allows you configure whether you want to create calculation lines for such non-eligible members and display them in the **Pricing Calculation Details** zone of the **Charges** tab on the **Membership** screen. To implement this business requirement, the following changes are made to the system:

- A new option type named **Display non-eligible members beyond max dependent count** is introduced in the **C1-ASOBLLNG** feature configuration.
- A new value named **DEMD** (i.e., Dependent is exceeding the max dependent count) is added in the **NEW_BORN_CMT_FLG** lookup field.
- The **C1_AGEPREM** algorithm is enhanced to consider the **Display non-eligible members beyond max dependent count** option type of the **C1-ASOBLLNG** feature configuration and accordingly create calculation lines for non-eligible members who are beyond maximum allowed dependent count.

If the **Display non-eligible members beyond max dependent count** option type of the **C1-ASOBLLNG** feature configuration is set to **Y**, the system will create calculation lines for non-eligible members who are beyond maximum allowed dependent count. The amount of such calculation lines will be zero.

These calculation lines will then be shown in the **Pricing Calculation Details** zone of the **Charges** tab on the **Membership** screen. However, to differentiate between calculation lines of eligible and non-eligible members, the following string will be added in the **Comments** column corresponding to non-eligible members' calculation lines - **Dependent is exceeding the max dependent count**.

In case of skip months scenario, the system will display calculation lines (with zero amount) for non-eligible members too but will add the **Dependent is exceeding the max dependent count** comment instead of the **Skip Month** comment against it. Similarly, if a newborn is not an eligible dependent member, the system will display a calculation line (with zero amount) for the newborn too but will add the **Dependent is exceeding the max dependent count** comment against it.

Note: This feature is tested and certified for the fully insured group and fully insured individual lines of business.

Billing Preference

The Billing Preference enables you to set the attributes that are used during:

- **Account Creation and Modification Via Inbound Message** – While creating or editing an account from the user interface or through a health care inbound message, the system enables you to define a billing preference characteristic for the account. Through the billing preference characteristic of an account, the system derives the bill cycle for the account from the **Bill Cycle** attribute of the billing preference.
- **Repricing** – While creating billable charges for an account, the system derives the bill period for the account from the billing preference. Note that the bill period is derived from the billing preference only when the **Bill Period Derivation (C1-BILLPDRV)** algorithm is attached to the **Account and Price Item Derivation Post-Processing** system event of the age based, tier based, additional fee, benefit, and/or discount charge pricing rule types.
- **9/10 Billing (Skip Months)** – While billing membership premium to an account, the system determines whether any month of coverage period should be skipped for billing using the **Skip Months** attribute from the billing preference. If so, the system distributes the off months' (i.e., skipped months) premium in the remaining months (i.e., non-skipped months) of the coverage period. You can specify one or more skip months in a billing preference which may be continuous or non-continuous. However, note that, you cannot skip all 12 months in a billing preference.

For more information about these attributes, see Defining a Billing Preference on page 3617.

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The system considers the billing preference defined using the characteristic type specified in the **Bill Cycle Rule Code** option type of the **C1-ASOBLLNG** feature configuration. You can define, edit, delete, and copy a billing preference using the **C1-FieldMapping** business object through the **Field Mapping** screen. While creating a billing preference, you must set the preference category to **Billing**.

Related Topics

For more information on...	See...
Tightly Coupled Bill Cycle and Bill Period through Billing Preference	Tightly Coupled Bill Cycle and Bill Period through Billing Preference on page 3492
9/10 Billing (Skip Months)	9/10 Billing (Skip Months) on page 3494
How to setup the **C1-ASOBLLNG** feature configuration	Setting the C1-ASOBLLNG Feature Configuration on page 4417

Searching for a Billing Preference

Procedure

To search for a billing preference:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **F** and then click **Field Mapping**.
   A sub-menu appears.
3. Click the **Search** option from the **Field Mapping** sub-menu.
   The **Field Mapping** screen appears.
4. Select the **Billing** option from the **Preference Category** list.
5. Enter the additional search criteria in the **Search Field Mapping** zone.

   Note: ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.
6. Click **Search**.
   A list of billing preferences that meet the search criteria appears in the **Search Results** section.

Viewing the Billing Preference Details

Procedure

To view the details of a billing preference:

1. Search for the billing preference in the **Field Mapping** screen.
2. In the **Search Results** section, click the **Broadcast** (ᯤ) icon corresponding to the billing preference whose details you want to view.
   The **Field Mapping** zone appears.
3. View the details of the billing preference in the **Field Mapping** zone.

Related Topics

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For more information on...	See...
How to search for a billing preference	Searching for a Billing Preference on page 3616

Defining a Billing Preference

Prerequisites

To define a billing preference, you should have:

- Field mapping business objects defined in the application.
- Bill cycles and bill periods defined in the application.

Procedure

To define a billing preference:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **F** and then click **Field Mapping**.
   A sub-menu appears.
3. Click the **Add** option from the **Field Mapping** sub-menu.

   The **Select Business Object** screen appears. It contains the following field:

Field Name	Field Description	Mandatory (Yes or No)

Field Mapping Business Object	Used to indicate the business object using which you want to create a billing preference. The valid values are:
	• **Bill Route Method - Contact Method Mapping (i.e., C1_BillRouteCntMethMap)** - Enables you to maintain a routing method - contact method mapping preference.
	• **Field Mapping (i.e., C1-FieldMapping)** - Enables you to maintain the following:
	  • Automatic Refund/Write-Off Preference
	  • Billing Preference
	  • Binder Payment Preference
	  • Configuration for Match Type - Handling Overpayment Preference
	  • Delinquency Process Preference
	  • Delinquency Process Type Preference
	  • Geographic Rating Area Preference
	  • Individual Membership Preference
	  • Medicare Preference
	  • Member Reconciliation Preference
	  • Member Relationship and Subscription Tier Preference
	  • Membership Repricing Reasons Preference
	  • Statement Construct Preference
	• **Group Membership Status Reason Mapping (i.e., C1-MemStatusReasonMapGroup)** - Enables you to maintain a group membership status reason preference.
		Yes

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Field Name	Field Description	Mandatory (Yes or No)
	• **Medicare Plan Benefit Package (i.e., C1-BenefitPackage)** - Enables you to maintain a Medicare plan benefit package. • **Membership Status Reason Mapping (i.e., C1-MemStatusReasonMapping)** - Enables you to maintain an individual membership status reason preference. **Note:** The above business objects are shipped with the product. The list includes those business objects which are created using the **Field Mapping** (i.e., **C1-FIELDMAP**) maintenance object.	

Note: Alternatively, you can access the **Select Business Object** screen by clicking the **Add** button in the **Page Title** area of the **Field Mapping** screen.

4. Select the **Field Mapping** option from the **Field Mapping Business Object** list.
5. Click **OK**.

The **Field Mapping** screen appears. It contains the following sections:

- **Main** - Used to specify basic details for the billing preference. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Preference	Used to specify the billing preference.	Yes
Description	Used to specify the description for the billing preference.	Yes
Detailed Description	Used to specify additional information about the billing preference. **Note:** You can resize the text box depending on your requirement by clicking the **Resize Handle** (⇲) icon at the bottom right corner of the text box.	No
Status	Used to indicate the status of the billing preference. The valid values are: • Active • Inactive	Yes

- **Preference Category** - Used to specify the preference category. It contains the following field:

Field Name	Field Description	Mandatory (Yes or No)
Preference Category	Used to indicate the category to which the preference belongs. The valid values are: • Automatic Refund/Write-Off • Billing • Binder Payment • Configuration for Match Type - Handling Overpayment • Delinquency Process • Delinquency Process Type	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	• Geographic Rating Area • Individual Membership • Medicare • Medicare Plan Benefit • Member Reconciliation • Member Relationship and Subscription Tier • Membership Repricing Reasons • Membership Status Reason • Routing Method - Contact Method Mapping • Statement Construct	
	Note: The list includes only those values which are defined in the **FIELD_CAT_FLG** lookup field. You must select the **Billing** option from the list while creating a billing preference.	

- **Preference Settings** - Used to set the attributes in the billing preference. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Attribute	Used to indicate the attribute that you want to set in the billing preference.	Yes
	Note: The attribute list appears only when the preference category is selected from the respective list.	
Value	Used to specify the attribute value.	Yes
	Note: The attribute value list appears only when the attribute is selected from the respective list. The attribute value list varies depending on the attribute that you want to set in the billing preference.	
Entity Type	Used to indicate the type of entity for which the attribute is applicable. The valid values are: • Account • Adjustment • Billable Charge • Membership • Payment • Policy	No
	Note: At present, this data is stored for informational purposes only and is not considered in the business logic. If required, you can add more entity types in the **MAP_ENTITY_FLG** lookup field.	

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The following table lists and describes the attributes available while defining, editing, or copying the billing preference:

Attribute	Description	Mandatory (Yes or No)
Bill Cycle	Used to specify the bill cycle. The system derives the bill cycle for an account from the billing preference when the billing preference characteristic is specified while creating or editing the account from the user interface or through a health care inbound message. **Note:** The list includes only those bill cycles which are already defined in the system.	Yes (Conditional) **Note:** This data is required when you want to derive the bill cycle for an account from the billing preference.
Bill Period	Used to specify the bill period. The system derives the bill period for an account from the billing preference while creating billable charges for the account when: • The billing preference characteristic is defined for the account. • The **C1-BILLPDRV** algorithm is invoked from the age based, tier based, additional fee, benefit, and/or discount charge pricing rule types. **Note:** The list includes only those bill periods which are already defined in the system.	Yes (Conditional) **Note:** This data is required when you want to derive the bill period for an account from the billing preference.
Skip Months	Used to specify the month for which you want to skip billing for the account. The valid values are: • January • February • March • April • May • June • July • August • September • October • November • December **Note:** You can define this attribute multiple times in the billing preference when you want to skip more than one month for billing. The skip months can be continuous or noncontinuous. However, note that, you cannot skip all 12 months in the billing preference.	Yes (Conditional) **Note:** This data is required when you want to use the **9/10 Billing (Skip Months)** feature for an account.

Note: While defining a billing preference, you must set at least one attribute in the billing preference.

6. Select the **Billing** option from the **Preference Category** list.
   The **Preference Category** section disappears and the **Preference Category** field appears in the **Main** section.

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7. Enter the required details in the **Main** section.
8. Set the required attributes in the billing preference.
9. If you want to set more than one attribute in the billing preference, click the **Add** (+) icon and then repeat step 8.

> **Note:** However, if you want to remove an attribute from the billing preference, click the **Delete** (🗑) icon corresponding to the attribute.

10. Click **Save**.
    The billing preference is defined.

Editing a Billing Preference

Prerequisites

To edit a billing preference, you should have:

- Bill cycles and bill periods defined in the application.

Procedure

To edit a billing preference:

1. Search for the billing preference in the **Field Mapping** screen.
2. In the **Search Results** section, click the **Edit** (✎) icon in the **Edit** column *c*orresponding to the billing preference whose details you want to edit.

   The **Field Mapping** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details for the billing preference. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Preference	Displays the billing preference.	Not applicable
Description	Used to specify the description for the billing preference.	Yes
Detailed Description	Used to specify additional information about the billing preference.	No
Status	Used to indicate the status of the billing preference. The valid values are: • Active • Inactive	Yes
Preference Category	Indicates the category to which the preference belongs. The valid value is: • Billing	Not applicable

   - **Preference Settings** - Used to set the attributes in the billing preference. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Attribute	Used to indicate the attribute that you want to set in the billing preference.	Yes
Value	Used to specify the attribute value.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The attribute value list appears only when the attribute is selected from the respective list. The attribute value list varies depending on the attribute that you want to set in the billing preference.	
Entity Type	Used to indicate the type of entity for which the attribute is applicable. The valid values are: • Account • Adjustment • Billable Charge • Membership • Payment • Policy **Note:** At present, this data is stored for informational purposes only and is not considered in the business logic. If required, you can add more entity types in the **MAP_ENTITY_FLG** lookup field.	No

The following table lists and describes the attributes available while defining, editing, or copying the billing preference:

Attribute	Description	Mandatory (Yes or No)
Bill Cycle	Used to specify the bill cycle. The system derives the bill cycle for an account from the billing preference when the billing preference characteristic is specified while creating or editing the account from the user interface or through a health care inbound message. **Note:** The list includes only those bill cycles which are already defined in the system.	Yes (Conditional) **Note:** This data is required when you want to derive the bill cycle for an account from the billing preference.
Bill Period	Used to specify the bill period. The system derives the bill period for an account from the billing preference while creating billable charges for the account when: • The billing preference characteristic is defined for the account. • The **C1-BILLPDRV** algorithm is invoked from the age based, tier based, additional fee, benefit, and/or discount charge pricing rule types. **Note:** The list includes only those bill periods which are already defined in the system.	Yes (Conditional) **Note:** This data is required when you want to derive the bill period for an account from the billing preference.
Skip Months	Used to specify the month for which you want to skip billing for the account. The valid values are: • January	Yes (Conditional)

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Attribute	Description	Mandatory (Yes or No)
	• February • March • April • May • June • July • August • September • October • November • December **Note:** You can define this attribute multiple times in the billing preference when you want to skip more than one month for billing. The skip months can be continuous or noncontinuous. However, note that, you cannot skip all 12 months in the billing preference.	**Note:** This data is required when you want to use the **9/10 Billing (Skip Months)** feature for an account.

Tip: Alternatively, you can click the **Edit** button in the **Field Mapping** zone to edit the details of the billing preference.

3. Modify the required details in the **Main** section.
4. Define, edit, or remove the attribute from the billing preference, if required.

Note: You must set at least one attribute in the billing preference.

5. Click **Save**.
   The changes made to the billing preference are saved.

Related Topics

For more information on...	See...
How to search for a billing preference	Searching for a Billing Preference on page 3616
Tightly Coupled Bill Cycle and Bill Period through Billing Preference	Tightly Coupled Bill Cycle and Bill Period through Billing Preference on page 3492
9/10 Billing (Skip Months)	9/10 Billing (Skip Months) on page 3494

Copying a Billing Preference

Instead of creating a billing preference from scratch, you can create a new billing preference using an existing billing preference. This is possible through copying a billing preference. On copying a billing preference, the details including the attributes are copied to the new billing preference. You can then edit the details, if required.

Prerequisites

To copy a billing preference, you should have:

- Billing preference (whose copy you want to create) defined in the application
- Bill cycles and bill periods defined in the application

Procedure

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To copy a billing preference:

1. Search for the billing preference in the **Field Mapping** screen.
2. In the **Search Results** section, click the **Duplicate** (⧉) icon in the **Duplicate** column *c*orresponding to the billing preference whose copy you want to create.

   The **Field Mapping** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details for the billing preference. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Preference	Used to specify the billing preference.	Yes
Description	Used to specify the description for the billing preference.	Yes
Detailed Description	Used to specify additional information about the billing preference.	No
Status	Used to indicate the status of the billing preference. The valid values are: • Active • Inactive	Yes
Preference Category	Indicates the category to which the preference belongs. The valid value is: • Billing	Not applicable

   - **Preference Settings** - Used to set the attributes in the billing preference. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Attribute	Used to indicate the attribute that you want to set in the billing preference.	Yes
Value	Used to specify the attribute value. **Note:** The attribute value list appears only when the attribute is selected from the respective list. The attribute value list varies depending on the attribute that you want to set in the billing preference.	Yes
Entity Type	Used to indicate the type of entity for which the attribute is applicable. The valid values are: • Account • Adjustment • Billable Charge • Membership • Payment • Policy	No

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Field Name	Field Description	Mandatory (Yes or No)
	Note: At present, this data is stored for informational purposes only and is not considered in the business logic. If required, you can add more entity types in the **MAP_ENTITY_FLG** lookup field.	

The following table lists and describes the attributes available while defining, editing, or copying the billing preference:

Attribute	Description	Mandatory (Yes or No)
Bill Cycle	Used to specify the bill cycle. The system derives the bill cycle for an account from the billing preference when the billing preference characteristic is specified while creating or editing the account from the user interface or through a health care inbound message. **Note:** The list includes only those bill cycles which are already defined in the system.	Yes (Conditional) **Note:** This data is required when you want to derive the bill cycle for an account from the billing preference.
Bill Period	Used to specify the bill period. The system derives the bill period for an account from the billing preference while creating billable charges for the account when: • The billing preference characteristic is defined for the account. • The **C1-BILLPDRV** algorithm is invoked from the age based, tier based, additional fee, benefit, and/or discount charge pricing rule types. **Note:** The list includes only those bill periods which are already defined in the system.	Yes (Conditional) **Note:** This data is required when you want to derive the bill period for an account from the billing preference.
Skip Months	Used to specify the month for which you want to skip billing for the account. The valid values are: • January • February • March • April • May • June • July • August • September • October • November • December	Yes (Conditional) **Note:** This data is required when you want to use the **9/10 Billing (Skip Months)** feature for an account.

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Attribute	Description	Mandatory (Yes or No)
	Note: You can define this attribute multiple times in the billing preference when you want to skip more than one month for billing. The skip months can be continuous or noncontinuous. However, note that, you cannot skip all 12 months in the billing preference.	

Note: While defining a billing preference, you must set at least one attribute in the billing preference.

Tip: Alternatively, you can click the **Duplicate** button in the **Field Mapping** zone to create a copy of the billing preference.

3. Enter the required details in the **Main** section.
4. Define, edit, or remove the attribute from the billing preference, if required.
5. Click **Save**.
   The new billing preference is defined.

Related Topics

For more information on...	See...
How to search for a billing preference	Searching for a Billing Preference on page 3616
Tightly Coupled Bill Cycle and Bill Period through Billing Preference	Tightly Coupled Bill Cycle and Bill Period through Billing Preference on page 3492
9/10 Billing (Skip Months)	9/10 Billing (Skip Months) on page 3494

Deleting a Billing Preference

Procedure

To delete a billing preference:

1. Search for the billing preference in the **Field Mapping** screen.
2. In the **Search Results** section, click the **Delete** (🗑) icon in the **Delete** column corresponding to the billing preference that you want to delete.
   A message appears confirming whether you want to delete the billing preference.

Tip: Alternatively, you can click the **Delete** button in the **Field Mapping** zone to delete the billing preference.

3. Click **OK**.
   The billing preference is deleted.

Related Topics

For more information on...	See...
How to search for a billing preference	Searching for a Billing Preference on page 3616

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Hold Request Preference

The Hold Request Preference enables you to set the attributes that are used during:

- **Manual Hold Request Creation Via Inbound Message** - While manually creating or releasing a hold request via an inbound message, the system uses the following attributes from the hold request preference:
  - Default Manual Hold Reason
  - Default Manual End Date
  - Default Manual Hold Request Type Code
  - Default Manual Release Reason
  - Default Manual Discard Reason
- **Automatic Hold Request Creation Via Inbound Message** - While automatically creating a hold request when the status of an inbound message is changed to **Rejected**, the system uses the following attributes from the hold request preference:
  - Create Automatic Hold Request
  - Default Automatic Hold Reason
  - Default Automatic End Date
  - Default Automatic Hold Request Type Code
  - Characteristic Type for Bill Level 1
  - Characteristic Type for Bill Level 2
  - Characteristic Type for Bill Level 3
  - Characteristic Type for Bill Level 4
- **Automatic Hold Request Creation Via File Upload Interface** – While automatically creating a hold request when a billable charge creation or cancelation fails for an account through the **File Upload Interface** feature, the system uses the following attributes from the hold request preference:
  - Create Premium Hold Request
  - Default Automatic Hold Reason
  - Default Automatic End Date
  - Default Automatic Hold Request Type Code

For more information about these attributes, see Defining a Hold Request Preference.

The system considers the hold request preference which is specified in the **Hold Request Field Mapping** option type of the **C1-HOLDSRCH** feature configuration. You can define, edit, delete, and copy a hold request preference using the **C1-FieldMapping** business object through the **Field Mapping** screen. While creating a hold request preference, you must set the preference category to **Hold Request**.

Searching for a Hold Request Preference

Procedure

To search for a hold request preference:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **F** and then click **Field Mapping**.
   A sub-menu appears.
3. Click the **Search** option from the **Field Mapping** sub-menu.
   The **Field Mapping** screen appears.
4. Select the **Hold Request** option from the **Preference Category** list.

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5. Enter the additional search criteria in the **Search Field Mapping** zone.

> **Note:** ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.

6. Click **Search**.
   A list of hold request preferences that meet the search criteria appears in the **Search Results** section.

Viewing the Hold Request Preference Details

Procedure

To view the details of a hold request preference:

1. Search for the hold request preference in the **Field Mapping** screen.
2. In the **Search Results** section, click the **Broadcast** (📡) icon corresponding to the hold request preference whose details you want to view.
   The **Field Mapping** zone appears.
3. View the details of the hold request preference in the **Field Mapping** zone.

Related Topics

For more information on...	See...
How to search for a hold request preference	Searching for a Hold Request Preference on page 2709

Defining a Hold Request Preference

Prerequisites

To define a hold request preference, you should have:

- Field mapping business objects defined in the application.
- Required characteristic types defined in the application (where the characteristic entity is set to **Membership**)
- Values defined in the **HOLD_REASON_FLG** lookup field.
- Required hold request types defined in the application.
- Required reasons defined for the **Discarded** and **Released** statuses of the **C1-HoldRequest** business object in the **Status Reason** screen.

Procedure

To define a hold request preference:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **F** and then click **Field Mapping**.
   A sub-menu appears.
3. Click the **Add** option from the **Field Mapping** sub-menu.

   The **Select Business Object** screen appears. It contains the following field:

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Field Name	Field Description	Mandatory (Yes or No)

Field Mapping Business Object	Used to indicate the business object using which you want to create a hold request preference. The valid values are:
	• **Bill Route Method - Contact Method Mapping (i.e., C1_BillRouteCntMethMap)** - Enables you to maintain a routing method - contact method mapping preference.
	• **Field Mapping (i.e., C1-FieldMapping)** - Enables you to maintain the following:
	  • Automatic Refund/Write-Off Preference
	  • Billing Preference
	  • Binder Payment Preference
	  • Configuration for Match Type - Handling Overpayment Preference
	  • Delinquency Process Preference
	  • Delinquency Process Type Preference
	  • Geographic Rating Area Preference
	  • Individual Membership Preference
	  • Medicare Preference
	  • Member Reconciliation Preference
	  • Member Relationship and Subscription Tier Preference
	  • Membership Repricing Reasons Preference
	  • Statement Construct Preference
	  • Transaction Paid Status Count Preference
	  • Hold Request Preference
	• **Group Membership Status Reason Mapping (i.e., C1-MemStatusReasonMapGroup)** - Enables you to maintain a group membership status reason preference.
	• **Medicare Plan Benefit Package (i.e., C1-BenefitPackage)** - Enables you to maintain a medicare plan benefit package.
	• **Membership Status Reason Mapping (i.e., C1-MemStatusReasonMapping)** - Enables you to maintain an individual membership status reason preference.
	Note: The above business objects are shipped with the product. The list includes those business objects which are created using the **Field Mapping** (i.e., **C1-FIELDMAP**) maintenance object.
		Yes

Note: Alternatively, you can access the **Select Business Object** screen by clicking the **Add** button in the **Page Title** area of the **Field Mapping** screen.

4. Select the **Field Mapping** option from the **Field Mapping Business Object** list.
5. Click **OK**.

The **Field Mapping** screen appears. It contains the following sections:

- **Main** - Used to specify basic details for the hold request preference. It contains the following fields:

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Field Name	Field Description	Mandatory (Yes or No)
Preference	Used to specify the hold request preference.	Yes
Description	Used to specify the description for the hold request preference.	Yes
Detailed Description	Used to specify additional information about the hold request preference. **Note:** You can resize the text box depending on your requirement by clicking the **Resize Handle** (⇲) icon at the bottom right corner of the text box.	No
Status	Used to indicate the status of the hold request preference. The valid values are: • Active • Inactive	Yes

- **Preference Category** - Used to specify the preference category. It contains the following field:

Field Name	Field Description	Mandatory (Yes or No)
Preference Category	Used to indicate the category to which the preference belongs. The valid values are: • Automatic Refund/Write-Off • Billing • Binder Payment • Configuration for Match Type - Handling Overpayment • Delinquency Process • Delinquency Process Type • Geographic Rating Area • Hold Request • Individual Membership • Medicare • Medicare Plan Benefit • Member Reconciliation • Member Relationship and Subscription Tier • Membership Repricing Reasons • Membership Status Reason • Routing Method - Contact Method Mapping • Statement Construct • Transaction Paid Status Count **Note:** The list includes only those values which are defined in the **FIELD_CAT_FLG** lookup field. You must select the **Hold Request** option from the list while creating a hold request preference.	Yes

- **Preference Settings** - Used to set the attributes in the hold request preference. It contains the following fields:

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Field Name	Field Description	Mandatory (Yes or No)
Attribute	Used to indicate the attribute that you want to set in the hold request preference. **Note:** The attribute list appears only when the preference category is selected from the respective list.	Yes
Value	Used to specify the attribute value. **Note:** The attribute value list appears only when the attribute is selected from the respective list. The attribute value list varies depending on the attribute that you want to set in the hold request preference.	Yes
Entity Type	Used to indicate the type of entity for which the attribute is applicable. The valid values are: • Account • Adjustment • Billable Charge • Membership • Payment • Policy **Note:** At present, this data is stored for informational purposes only and is not considered in the business logic. If required, you can add more entity types in the **MAP_ENTITY_FLG** lookup field.	No

The following table lists and describes the attributes available while defining, editing, or copying the hold request preference:

Attribute	Description	Mandatory (Yes or No)
Characteristic Type for Bill Level 1	Used to specify the characteristic type which stores the bill group derivation and pricing parameter 1 for the membership. The system considers this characteristic type to determine the account to which the group membership is billed. The system then creates an automatic hold request for the respective billing account via the inbound message. **Note:** You must specify a characteristic type where the characteristic entity is set to **Membership**.	Yes
Characteristic Type for Bill Level 2	Used to specify the characteristic type which stores the bill group derivation and pricing parameter 2 for the membership. The system considers this characteristic type to determine the account to which the group membership is billed. The system then creates an automatic hold request for the respective billing account via the inbound message.	Yes

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Attribute	Description	Mandatory (Yes or No)
	Note: You must specify a characteristic type where the characteristic entity is set to **Membership**.	
Characteristic Type for Bill Level 3	Used to specify the characteristic type which stores the bill group derivation and pricing parameter 3 for the membership. The system considers this characteristic type to determine the account to which the group membership is billed. The system then creates an automatic hold request for the respective billing account via the inbound message. **Note:** You must specify a characteristic type where the characteristic entity is set to **Membership**.	Yes
Characteristic Type for Bill Level 4	Used to specify the characteristic type which stores the bill group derivation and pricing parameter 4 for the membership. The system considers this characteristic type to determine the account to which the group membership is billed. The system then creates an automatic hold request for the respective billing account via the inbound message. **Note:** You must specify a characteristic type where the characteristic entity is set to **Membership**.	Yes
Create Automatic Hold Request	Used to indicate whether the system should automatically create a hold request whenever the status of an inbound message (with person or account data) is changed to **Rejected**. The valid values are: • Yes • No	Yes
Create Premium Hold Request	Used to indicate whether the system should automatically create a hold request when a billable charge creation or cancelation fails for an account through the **File Upload Interface** feature. The valid values are: • Yes • No	Yes
Default Automatic End Date	Used to specify the date till when you want an automatic hold request to be effective. **Note:** The specified date should be later than the date when the automatic hold request is created via an inbound message or file upload interface. You must specify the date in the **YYYY-MM-DD** format.	Yes
Default Automatic Hold Reason	Used to indicate the reason why you want to hold the entity via an automatic hold request.	Yes

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Attribute	Description	Mandatory (Yes or No)
	Note: The list includes only those values which are defined in the **HOLD_REASON_FLG** lookup field.	
Default Automatic Hold Request Type Code	Used to indicate the hold request type using which you want to create an automatic hold request via an inbound message or file upload interface. **Note:** The list includes only those hold request types which are already defined in the system.	Yes
Default Manual Discard Reason	Used to indicate the reason why you want to discard the hold request via an inbound message. The system considers the default manual discard reason when the **action** tag is set to **R** within the **billHold** tag in an inbound message and the derived hold request's start data is a future date. **Note:** You must specify a reason which is already defined for the **Discarded** status of the **C1-HoldRequest** business object through the **Status Reason** screen.	Yes
Default Manual End Date	Used to specify the date till when you want a manual hold request to be effective. The system considers the default manual end date when the **action** tag is set to **H** or **R** and other hold details are not received within the **billHold** tag in an inbound message. **Note:** The specified date should be later than the date when the manual hold request is created via an inbound message. You must specify the date in the **YYYY-MM-DD** format.	Yes
Default Manual Hold Reason	Used to indicate the reason why you want to hold the entity via a manual hold request. The system considers the default manual hold reason when the **action** tag is set to **H** or **R** and other hold details are not received within the **billHold** tag in an inbound message. **Note:** The list includes only those values which are defined in the **HOLD_REASON_FLG** lookup field.	Yes
Default Manual Hold Request Type Code	Used to indicate the hold request type using which you want to create a manual hold request via an inbound message. The system considers the default manual hold request type when the **action** tag is set to **H** or **R** and other hold details are not received within the **billHold** tag in an inbound message. **Note:** The list includes only those hold request types which are already defined in the system.	Yes
Default Manual Release Reason	Used to indicate the reason why you want to release the hold request via an inbound message. The system considers the	Yes

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Attribute	Description	Mandatory (Yes or No)
	default manual release reason when the **action** tag is set to **R** within the **billHold** tag in an inbound message.	
	Note: You must specify a reason which is already defined for the **Released** status of the **C1-HoldRequest** business object through the **Status Reason** screen.	

Note: While defining a hold request preference, you must set at least one attribute in the hold request preference.

6. Select the **Hold Request** option from the **Preference Category** list.
   The **Preference Category** section disappears and the **Preference Category** field appears in the **Main** section.
7. Enter the required details in the **Main** section.
8. Set the required attributes in the hold request preference.
9. If you want to set more than one attribute in the hold request preference, click the **Add** (+) icon and then repeat step 8.

Note: However, if you want to remove an attribute from the hold request preference, click the **Delete** (🗑) icon corresponding to the attribute.

10. Click **Save**.
    The hold request preference is defined.

Related Topics

For more information on...	See...
Manual Hold Request Creation Via Inbound Message	Manual Hold Request Creation Via Inbound Message
Automatic Hold Request Creation Via Inbound Message	Automatic Hold Request Creation Via Inbound Message
Automatic Hold Request Creation Via File Upload Interface	Automatic Hold Request Creation Via File Upload Interface on page 3614

Editing a Hold Request Preference

Prerequisites

To edit a hold request preference, you should have:

- Required characteristic types defined in the application (where the characteristic entity is set to **Membership**)
- Values defined in the **HOLD_REASON_FLG** lookup field.
- Required hold request types defined in the application.
- Required reasons defined for the **Discarded** and **Released** statuses of the **C1-HoldRequest** business object in the **Status Reason** screen.

Procedure

To edit a hold request preference:

1. Search for the hold request preference in the **Field Mapping** screen.
2. In the **Search Results** section, click the **Edit** (✎) icon in the **Edit** column corresponding to the hold request preference whose details you want to edit.

   The **Field Mapping** screen appears. It contains the following sections:

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- **Main** - Used to specify basic details for the hold request preference. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Preference	Displays the hold request preference.	Not applicable
Description	Used to specify the description for the hold request preference.	Yes
Detailed Description	Used to specify additional information about the hold request preference. **Note:** You can resize the text box depending on your requirement by clicking the **Resize Handle** (⁄) icon at the bottom right corner of the text box.	No
Status	Used to indicate the status of the hold request preference. The valid values are: • Active • Inactive	Yes
Preference Category	Indicates the category to which the preference belongs. The valid value is: • Hold Request	Not applicable

- **Preference Settings** - Used to set the attributes in the hold request preference. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Attribute	Used to indicate the attribute that you want to set in the hold request preference.	Yes
Value	Used to specify the attribute value. **Note:** The attribute value list appears only when the attribute is selected from the respective list. The attribute value list varies depending on the attribute that you want to set in the hold request preference.	Yes
Entity Type	Used to indicate the type of entity for which the attribute is applicable. The valid values are: • Account • Adjustment • Billable Charge • Membership • Payment • Policy	No

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Field Name	Field Description	Mandatory (Yes or No)
	Note: At present, this data is stored for informational purposes only and is not considered in the business logic. If required, you can add more entity types in the **MAP_ENTITY_FLG** lookup field.	

The following table lists and describes the attributes available while defining, editing, or copying the hold request preference:

Attribute	Description	Mandatory (Yes or No)
Characteristic Type for Bill Level 1	Used to specify the characteristic type which stores the bill group derivation and pricing parameter 1 for the membership. The system considers this characteristic type to determine the account to which the group membership is billed. The system then creates an automatic hold request for the respective billing account via the inbound message. **Note:** You must specify a characteristic type where the characteristic entity is set to **Membership**.	Yes
Characteristic Type for Bill Level 2	Used to specify the characteristic type which stores the bill group derivation and pricing parameter 2 for the membership. The system considers this characteristic type to determine the account to which the group membership is billed. The system then creates an automatic hold request for the respective billing account via the inbound message. **Note:** You must specify a characteristic type where the characteristic entity is set to **Membership**.	Yes
Characteristic Type for Bill Level 3	Used to specify the characteristic type which stores the bill group derivation and pricing parameter 3 for the membership. The system considers this characteristic type to determine the account to which the group membership is billed. The system then creates an automatic hold request for the respective billing account via the inbound message. **Note:** You must specify a characteristic type where the characteristic entity is set to **Membership**.	Yes
Characteristic Type for Bill Level 4	Used to specify the characteristic type which stores the bill group derivation and pricing parameter 4 for the membership. The system considers this characteristic type to determine the account to which the group membership is billed. The system then creates an automatic hold request for the respective billing account via the inbound message. **Note:** You must specify a characteristic type where the characteristic entity is set to **Membership**.	Yes

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Attribute	Description	Mandatory (Yes or No)
Create Automatic Hold Request	Used to indicate whether the system should automatically create a hold request whenever the status of an inbound message (with person or account data) is changed to **Rejected**. The valid values are: • Yes • No	Yes
Create Premium Hold Request	Used to indicate whether the system should automatically create a hold request when a billable charge creation or cancelation fails for an account through the **File Upload Interface** feature. The valid values are: • Yes • No	Yes
Default Automatic End Date	Used to specify the date till when you want an automatic hold request to be effective. **Note:** The specified date should be later than the date when the automatic hold request is created via an inbound message or file upload interface. You must specify the date in the **YYYY-MM-DD** format.	Yes
Default Automatic Hold Reason	Used to indicate the reason why you want to hold the entity via an automatic hold request. **Note:** The list includes only those values which are defined in the **HOLD_REASON_FLG** lookup field.	Yes
Default Automatic Hold Request Type Code	Used to indicate the hold request type using which you want to create an automatic hold request via an inbound message or file upload interface. **Note:** The list includes only those hold request types which are already defined in the system.	Yes
Default Manual Discard Reason	Used to indicate the reason why you want to discard the hold request via an inbound message. The system considers the default manual discard reason when the **action** tag is set to **R** within the **billHold** tag in an inbound message and the derived hold request's start data is a future date. **Note:** You must specify a reason which is already defined for the **Discarded** status of the **C1-HoldRequest** business object through the **Status Reason** screen.	Yes
Default Manual End Date	Used to specify the date till when you want a manual hold request to be effective. The system considers the default manual end date when the **action** tag is set to **H** or **R** and other hold details are not received within the **billHold** tag in an inbound message.	Yes

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Attribute	Description	Mandatory (Yes or No)
	Note: The specified date should be later than the date when the manual hold request is created via an inbound message. You must specify the date in the **YYYY-MM-DD** format.	
Default Manual Hold Reason	Used to indicate the reason why you want to hold the entity via a manual hold request. The system considers the default manual hold reason when the **action** tag is set to **H** or **R** and other hold details are not received within the **billHold** tag in an inbound message. **Note:** The list includes only those values which are defined in the **HOLD_REASON_FLG** lookup field.	Yes
Default Manual Hold Request Type Code	Used to indicate the hold request type using which you want to create a manual hold request via an inbound message. The system considers the default manual hold request type when the **action** tag is set to **H** or **R** and other hold details are not received within the **billHold** tag in an inbound message. **Note:** The list includes only those hold request types which are already defined in the system.	Yes
Default Manual Release Reason	Used to indicate the reason why you want to release the hold request via an inbound message. The system considers the default manual release reason when the **action** tag is set to **R** within the **billHold** tag in an inbound message. **Note:** You must specify a reason which is already defined for the **Released** status of the **C1-HoldRequest** business object through the **Status Reason** screen.	Yes

Tip: Alternatively, you can click the **Edit** button in the **Field Mapping** zone to edit the details of the hold request preference.

3. Modify the required details in the **Main** section.
4. Define, edit, or remove the attribute from the hold request preference, if required.

Note: You must set at least one attribute in the hold request preference.

5. Click **Save**.
   The changes made to the hold request preference are saved.

Related Topics

For more information on...	See...
How to search for a hold request preference	Searching for a Hold Request Preference on page 2709
Manual Hold Request Creation Via Inbound Message	Manual Hold Request Creation Via Inbound Message

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For more information on...	See...
Automatic Hold Request Creation Via Inbound Message	Automatic Hold Request Creation Via Inbound Message
Automatic Hold Request Creation Via File Upload Interface	Automatic Hold Request Creation Via File Upload Interface on page 3614

Copying a Hold Request Preference

Instead of creating a hold request preference from scratch, you can create a new hold request preference using an existing hold request preference. This is possible through copying a hold request preference. On copying a hold request preference, the details including the attributes are copied to the new hold request preference. You can then edit the details, if required.

Prerequisites

To copy a hold request preference, you should have:

- Hold request preference (whose copy you want to create) defined in the application
- Required characteristic types defined in the application (where the characteristic entity is set to **Membership**)
- Values defined in the **HOLD_REASON_FLG** lookup field.
- Required hold request types defined in the application.
- Required reasons defined for the **Discarded** and **Released** statuses of the **C1-HoldRequest** business object in the **Status Reason** screen.

Procedure

To copy a hold request preference:

1. Search for the hold request preference in the **Field Mapping** screen.
2. In the **Search Results** section, click the **Duplicate** (⧉) icon in the **Duplicate** column corresponding to the hold request preference whose copy you want to create.

   The **Field Mapping** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details for the hold request preference. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Preference	Used to specify the hold request preference.	Yes
Description	Used to specify the description for the hold request preference.	Yes
Detailed Description	Used to specify additional information about the hold request preference. **Note:** You can resize the text box depending on your requirement by clicking the **Resize Handle** (⇲) icon at the bottom right corner of the text box.	No
Status	Used to indicate the status of the hold request preference. The valid values are: • Active • Inactive	Yes

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Field Name	Field Description	Mandatory (Yes or No)
Preference Category	Indicates the category to which the preference belongs. The valid value is: • Hold Request	Not applicable

- **Preference Settings** - Used to set the attributes in the hold request preference. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Attribute	Used to indicate the attribute that you want to set in the hold request preference.	Yes
Value	Used to specify the attribute value. **Note:** The attribute value list appears only when the attribute is selected from the respective list. The attribute value list varies depending on the attribute that you want to set in the hold request preference.	Yes
Entity Type	Used to indicate the type of entity for which the attribute is applicable. The valid values are: • Account • Adjustment • Billable Charge • Membership • Payment • Policy **Note:** At present, this data is stored for informational purposes only and is not considered in the business logic. If required, you can add more entity types in the **MAP_ENTITY_FLG** lookup field.	No

The following table lists and describes the attributes available while defining, editing, or copying the hold request preference:

Attribute	Description	Mandatory (Yes or No)
Characteristic Type for Bill Level 1	Used to specify the characteristic type which stores the bill group derivation and pricing parameter 1 for the membership. The system considers this characteristic type to determine the account to which the group membership is billed. The system then creates an automatic hold request for the respective billing account via the inbound message. **Note:** You must specify a characteristic type where the characteristic entity is set to **Membership**.	Yes

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Attribute	Description	Mandatory (Yes or No)
Characteristic Type for Bill Level 2	Used to specify the characteristic type which stores the bill group derivation and pricing parameter 2 for the membership. The system considers this characteristic type to determine the account to which the group membership is billed. The system then creates an automatic hold request for the respective billing account via the inbound message. **Note:** You must specify a characteristic type where the characteristic entity is set to **Membership**.	Yes
Characteristic Type for Bill Level 3	Used to specify the characteristic type which stores the bill group derivation and pricing parameter 3 for the membership. The system considers this characteristic type to determine the account to which the group membership is billed. The system then creates an automatic hold request for the respective billing account via the inbound message. **Note:** You must specify a characteristic type where the characteristic entity is set to **Membership**.	Yes
Characteristic Type for Bill Level 4	Used to specify the characteristic type which stores the bill group derivation and pricing parameter 4 for the membership. The system considers this characteristic type to determine the account to which the group membership is billed. The system then creates an automatic hold request for the respective billing account via the inbound message. **Note:** You must specify a characteristic type where the characteristic entity is set to **Membership**.	Yes
Create Automatic Hold Request	Used to indicate whether the system should automatically create a hold request whenever the status of an inbound message (with person or account data) is changed to **Rejected**. The valid values are: • Yes • No	Yes
Create Premium Hold Request	Used to indicate whether the system should automatically create a hold request when a billable charge creation or cancelation fails for an account through the **File Upload Interface** feature. The valid values are: • Yes • No	Yes
Default Automatic End Date	Used to specify the date till when you want an automatic hold request to be effective.	Yes

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Attribute	Description	Mandatory (Yes or No)
	Note: The specified date should be later than the date when the automatic hold request is created via an inbound message or file upload interface. You must specify the date in the **YYYY-MM-DD** format.	
Default Automatic Hold Reason	Used to indicate the reason why you want to hold the entity via an automatic hold request. **Note:** The list includes only those values which are defined in the **HOLD_REASON_FLG** lookup field.	Yes
Default Automatic Hold Request Type Code	Used to indicate the hold request type using which you want to create an automatic hold request via an inbound message or file upload interface. **Note:** The list includes only those hold request types which are already defined in the system.	Yes
Default Manual Discard Reason	Used to indicate the reason why you want to discard the hold request via an inbound message. The system considers the default manual discard reason when the **action** tag is set to **R** within the **billHold** tag in an inbound message and the derived hold request's start data is a future date. **Note:** You must specify a reason which is already defined for the **Discarded** status of the **C1-HoldRequest** business object through the **Status Reason** screen.	Yes
Default Manual End Date	Used to specify the date till when you want a manual hold request to be effective. The system considers the default manual end date when the **action** tag is set to **H** or **R** and other hold details are not received within the **billHold** tag in an inbound message. **Note:** The specified date should be later than the date when the manual hold request is created via an inbound message. You must specify the date in the **YYYY-MM-DD** format.	Yes
Default Manual Hold Reason	Used to indicate the reason why you want to hold the entity via a manual hold request. The system considers the default manual hold reason when the **action** tag is set to **H** or **R** and other hold details are not received within the **billHold** tag in an inbound message. **Note:** The list includes only those values which are defined in the **HOLD_REASON_FLG** lookup field.	Yes

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Attribute	Description	Mandatory (Yes or No)
Default Manual Hold Request Type Code	Used to indicate the hold request type using which you want to create a manual hold request via an inbound message. The system considers the default manual hold request type when the **action** tag is set to **H** or **R** and other hold details are not received within the **billHold** tag in an inbound message. **Note:** The list includes only those hold request types which are already defined in the system.	Yes
Default Manual Release Reason	Used to indicate the reason why you want to release the hold request via an inbound message. The system considers the default manual release reason when the **action** tag is set to **R** within the **billHold** tag in an inbound message. **Note:** You must specify a reason which is already defined for the **Released** status of the **C1-HoldRequest** business object through the **Status Reason** screen.	Yes

Note: While defining a hold request preference, you must set at least one attribute in the hold request preference.

Tip: Alternatively, you can click the **Duplicate** button in the **Field Mapping** zone to create a copy of the hold request preference.

3. Enter the required details in the **Main** section.
4. Define, edit, or remove the attribute from the hold request preference, if required.
5. Click **Save**.
   The new hold request preference is defined.

Related Topics

For more information on...	See...
How to search for a hold request preference	Searching for a Hold Request Preference on page 2709
Manual Hold Request Creation Via Inbound Message	Manual Hold Request Creation Via Inbound Message
Automatic Hold Request Creation Via Inbound Message	Automatic Hold Request Creation Via Inbound Message
Automatic Hold Request Creation Via File Upload Interface	Automatic Hold Request Creation Via File Upload Interface on page 3614

Deleting a Hold Request Preference

Procedure

To delete a hold request preference:

1. Search for the hold request preference in the **Field Mapping** screen.
2. In the **Search Results** section, click the **Delete** (🗑) icon in the **Delete** column corresponding to the hold request preference that you want to delete.
   A message appears confirming whether you want to delete the hold request preference.

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Tip: Alternatively, you can click the **Delete** button in the **Field Mapping** zone to delete the hold request preference.

3. Click **OK**.
   The hold request preference is deleted.

Related Topics

For more information on...	See...
How to search for a hold request preference	Searching for a Hold Request Preference on page 2709

Chapter 41

Off-Process Request

Topics:

- Prerequisites
- Off-Process Request (Without Approval) Status Transition
- Off-Process Request (With Approval) Status Transition
- Algorithms Used in C1-OffProcessRequest
- Off-Process Request Type
- Off-Process Request (Used for Searching)
- Off-Process Request (Used for Viewing)

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

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

The following table lists a set of fields used during the respective accumulation that can be amended through an off-process request:

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

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

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

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

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

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

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

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

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

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

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

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

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

- The coverage period for which the amendment is applicable

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

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

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

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

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

For more information on how to setup the off-process request feature, see Prerequisites on page 3648.

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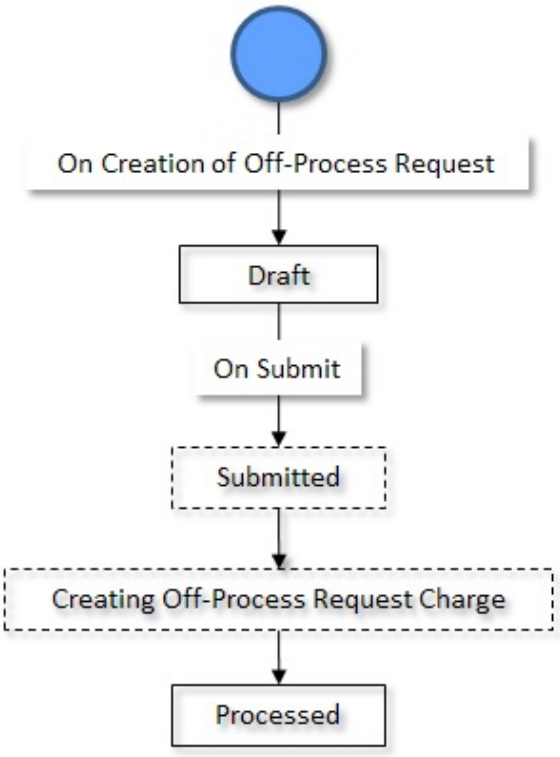
Prerequisites

Information will be available soon...

Off-Process Request (Without Approval) Status Transition

The following figure graphically indicates how an off-process request moves from one status to another when the approval process is not configured in the off-process request type:



Off-Process Request (With Approval) Status Transition

The following figure graphically indicates how an off-process request moves from one status to another when the approval process is configured in the off-process request type:

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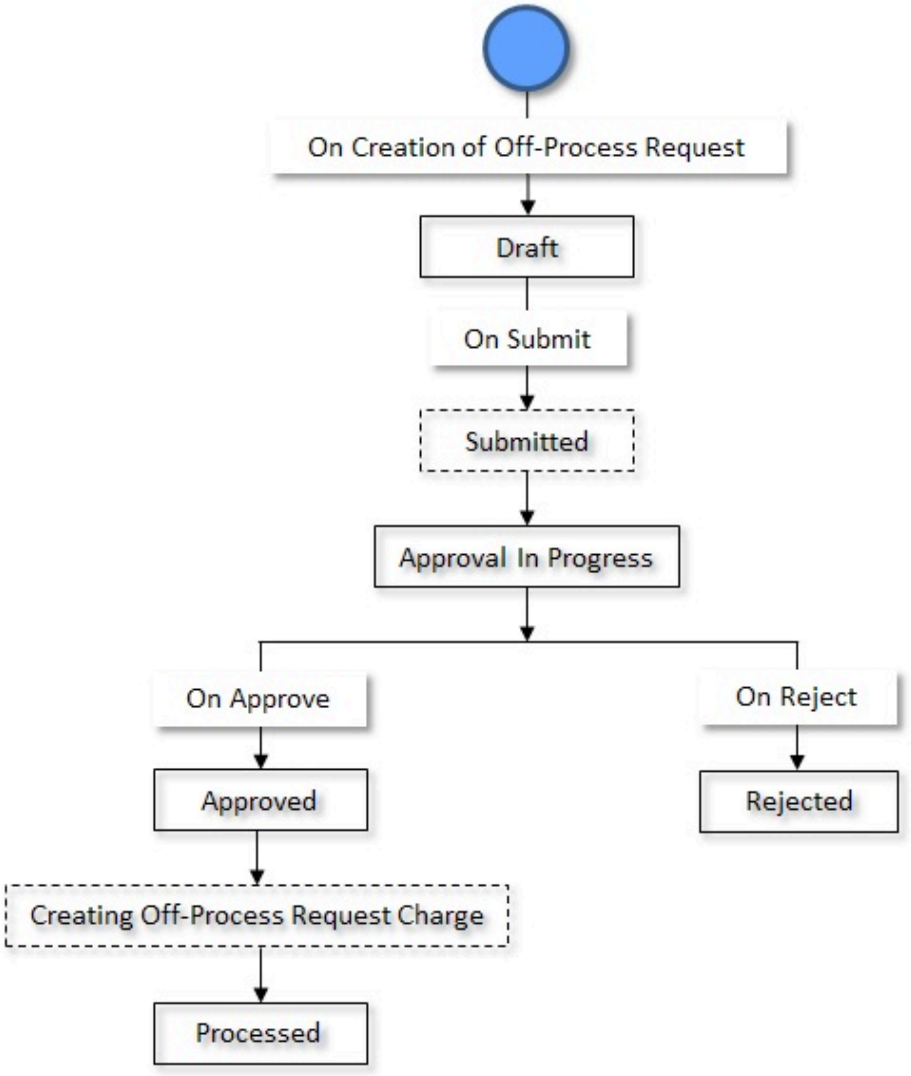

Algorithms Used in C1-OffProcessRequest

Information will be available soon...

Off-Process Request Type

Oracle Revenue Management and Billing allows you to define an off-process request type using which you can create an off-process request. It is the off-process request type which helps the system to determine the following:

- The business object using which the off-process request should be created in the system.
- Whether the system should create the adjustment or billable charge to amend the accumulation field values.
- Whether approval is required for an off-process request.
- The accumulation categories and their respective amendment fields whose field values can be amended through the off-process requests.

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- The default adjustment type or the billable charge line type using which the adjustment should be created in the system.
- The type of contract against which the adjustment or billable charge should be created for the account.

The **Off-Process Request Type** screen allows you to define, edit, delete, and copy an off-process request type. It contains the following zones:

- Off-Process Request Type List on page 3650
- Off-Process Request Type on page 3650

Off-Process Request Type List

The **Off-Process Request Type List** zone lists the off-process request types that are already defined in the system. It contains the following columns:

Column Name	Column Description
Off-Process Request Type	Displays the off-process request type.
Description	Displays the description of the off-process request type.
Edit	On clicking the **Edit** (✎) icon, the **Off-Process Request Type** screen appears where you can edit the details of the off-process request type.
Duplicate	On clicking the **Duplicate** (⧉) icon, the **Off-Process Request Type** screen appears where you can define a new off-process request type using an existing off-process request type.
Delete	On clicking the **Delete** (🗑) icon, you can delete the off-process request type.
	Note: You can delete an off-process request type when you have not created an off-process request using the off-process request type.

On clicking the **Broadcast** (📡) icon corresponding to an off-process request type, the **Off-Process Request Type** zone appears with the details of the respective off-process request type.

Related Topics

For more information on...	See...
How to edit an off-process request type	Editing an Off-Process Request Type on page 3657
How to copy an off-process request type	Copying an Off-Process Request Type on page 3660
How to delete an off-process request type	Deleting an Off-Process Request Type on page 3659
How to view the details of an off-process request type	Viewing the Off-Process Request Type Details on page 3662

Off-Process Request Type

The **Off-Process Request Type** zone displays the details of the off-process request type. It contains of the following sections:

- **Main** - Displays the basic information about the off-process request type. It contains the following fields:

Column Name	Column Description
Off-Process Request Type	Displays the off-process request type.

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Column Name	Column Description
Business Object	Indicates the business object using which the off-process request type is created. In addition, a context menu appears corresponding to this field which helps in navigating to other screens in the application. **Note:** It has a link. On clicking the link, the **Business Object** screen appears where you can view the details of the respective business object.
Description	Displays the description of the off-process request type.
Detailed Description	Displays additional information about the off-process request type.
Off-Process Request Business Object	Indicates the business object using which an off-process request should be created. In addition, a context menu appears corresponding to this field which helps in navigating to other screens in the application. **Note:** It has a link. On clicking the link, the **Business Object** screen appears where you can view the details of the respective business object.
Status	Indicates the status of the off-process request type. The valid values are: • Active • Inactive
Amendment Mode	Indicates whether adjustments or billable charges should be created using the off-process request type.
Approval Required	Indicates whether approval is required while creating the adjustments or billable charges using the off-process request type.
Approval Profile	Indicates the approval profile which must be used to define approval hierarchy for the off-process request type. **Note:** The **Approval Profile** field appears when the **Approval Required** check box is selected. It has a link. On clicking the link, the **Approval Profile** screen appears where you can view the details of the respective approval profile.
Approval To Do Type	Indicates that the To Do entry of the specified To Do type must be created when an off-process request is submit for approval. **Note:** It has a link. On clicking the link, the **To Do Type** screen appears where you can view the details of the respective To Do type. This field appears when the **Approval Required** option is selected.
Approval To Do Role	Indicates that users with the specified To Do role can only approve an off-process request which is submitted for approval.

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Column Name	Column Description
	Note: It has a link. On clicking the link, the **To Do Role** screen appears where you can view the details of the respective To Do role. This field appears when the **Approval Required** option is selected.

- **Accumulation Amendment Details** - Lists the types of accumulation defined for the off-process type. It contains the following columns:

Column Name	Column Description
Accumulation Category	Indicates the category for which the adjustment or billable charge is created.
Amendment Field	Indicates the field for which the adjustment or billable charge is created.
Contract Type	Indicates the contract type which is associated while defining the off-process request type.
Adjustment Type/Billable Charge Line Type	Indicates the adjustment or billable charge line type using which the adjustment or billable charge should be created through the off-process request.

- **Characteristics** - The **Characteristics** section lists the characteristics of the off-process request type. It contains the following columns:

Column Name	Column Description
Characteristic Type	Indicates the characteristic type.
Characteristic Value	Displays the value of the characteristic type.

- **Record Actions** - The **Record Actions** section contains the following buttons:

Button Name	Button Description
Edit	Used to edit the details of the off-process request type.
Delete	Used to delete the off-process request type. **Note:** You can delete a off-process request type when you have not created a off-process request using the off-process request type.
Duplicate	Used to create a new off-process request type using an existing off-process request type.

- **Record Information** - The **Record Information** section contains the following fields:

Field Name	Field Description
Business Object	Indicates the business object using which the off-process request type is created. In addition, a context menu appears corresponding to this field which helps in navigating to other screens in the application. **Note:** It has a link. On clicking the link, the **Business Object** screen appears where you can view the details of the respective business object.

By default, the **Off-Process Request Type** zone does not appear in the **Off-Process Request Type** screen. It appears when you click the **Broadcast** (📡) icon corresponding to the off-process request type in the **Off-Process Request Type List** zone.

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Related Topics

For more information on...	See...
How to edit an off-process request type	Editing an Off-Process Request Type on page 3657
How to copy an off-process request type	Copying an Off-Process Request Type on page 3660
How to delete an off-process request type	Deleting an Off-Process Request Type on page 3659
How to view the details of an off-process request type	Viewing the Off-Process Request Type Details on page 3662

Defining an Off-Process Request Type

Prerequisites

To define an off-process request type, you should have:

- Off-process request type business objects defined in the application
- Off-process request business objects defined in the application
- Required approval profiles defined in the application
- Required To Do role assigned to the **C1-OFPAP** To Do type in the application
- Accumulation category defined in the application
- Amendment field and amendment mode defined in the application
- Contract type defined in the application
- Adjustment type and billable charge line type defined in the application
- Off-process request type status defined in the application

Procedure

To define an off-process request type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **O** and then click **Off-Process Request Type**.
   A sub-menu appears.
3. Click the **Add** option from the **Off-Process Request Type** sub-menu.

   The **Off-Process Request Type** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details about the off-process request type.
   - **Accumulation Amendment Details** - Used to specify the accumulation amendment details for the off-process request type.
   - **Characteristics** - Used to define the characteristics for the off-process request type.

   The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Off-Process Request Type	Used to specify the off-process request type.	Yes
Business Object	Indicates the business object using which you are defining the off-process request type.	Not applicable
Description	Used to specify the description for the off-process request type.	Yes
Detailed Description	Used to specify additional information about the off-process request type.	No

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Field Name	Field Description	Mandatory (Yes or No)
Off-Process Request Business Object	Used to indicate the business object using which you want to create the off-process request.	Yes
Status	Used to indicate the status of the off-process request type. The valid values are: • Active • Inactive **Note:** You cannot change the status of an off-process request type to **Inactive** when the corresponding off-process request is in a status other than **Processed** or **Rejected**. By default, the **Active** option is selected.	Not applicable
Amendment Mode	Used to indicate the amendment mode selected for the off-process request type. The valid values are: • Adjustment • Billable Charge	Yes
Approval Required	Used to indicate whether the approval is required before generating adjustments or billable charges through an off-process request.	No
Approval To Do Type	Used to indicate that To Do entry of the specified To Do type must be created when an off-process request is submitted for approval. **Note:** The **Search** icon appears corresponding to the **Approval To Do Type** field. On clicking the **Search** icon, the **To Do Type Search** window appears. On specifying the To Do type, the description of the To Do type appears corresponding to the Approval To Do Type field. This field appears when the **Approval Required** option is selected.	Yes (Conditional) **Note:** This field is required when the **Approval Required** option is selected.
Approval To Do Role	Used to indicate that users with the specified To Do role can only approve an off-process request submitted for approval. **Note:** The list includes only those To Do roles which are associated to the specified approval To Do type. This field appears only when the **Approval Required** option is selected.	Yes (Conditional) **Note:** This field is required when the **Approval Required** option is selected.

4. Enter the required details in the **Main** section.
5. Define the accumulation amendment details for the off-process request type, if required.

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6. Define characteristics for the off-process request type, if required.
7. Click **Save**.
   The off-process request type is defined.

Related Topics

For more information on...	See...
Off-Process Request Type screen	Off-Process Request Type on page 3649
How to add accumulation details for an off-process request type	Adding the Accumulation Amendment Details in an Off-Process Request Type on page 3655
How to define a characteristic for an off-process request type	Defining a Characteristic for an Off-Process Request Type on page 3656

Adding the Accumulation Amendment Details in an Off-Process Request Type

Prerequisites

To add accumulation amendment details in an off-process request type, you should have:

- Accumulation categories defined in the application
- Amendment fields defined in the application
- Contract types defined in the application
- Adjustment type and billable charge line type defined in the application

Procedure

To add accumulation amendment details in an off-process request types:

1. Ensure that the **Accumulation Amendment Details** section is expanded when you are adding the accumulation amendment details in an off-process request type.

   The **Accumulation Amendment Details** section contains the following fields in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Accumulation Category	Used to indicate the category that you want to use for accumulation. The valid values are: • Aggregate Stop Loss • Discount Arrangement • Level Funded • Specific Stop-Loss	Yes
Amendment Field	Used to indicate the field that you want to use for accumulation purposes. The valid values are: • ASL Limit • Aggregated Amount • Cumulative ASL Credit • Cumulative SSL Credit • Maximum Limit • Minimum Limit • Run Out Fund • Settlement Fund	Yes

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Field Name	Field Description	Mandatory (Yes or No)
Contract Type	Used to indicate the contract that you want to use for accumulation and amendment purposes. **Note:** The **Search** icon appears corresponding to the **Contract Type** field. On clicking the **Search** icon, the **Contract Type Search** window appears.	Yes (Conditional) **Note:** This field is required when you are defining accumulation amendment details in an off-process request type.
Adjustment Type/Billable Charge Line Type	Used to indicate the type of charge using which you want to create adjustments or billable charges. The **Search** (🔍) icon appears corresponding to the **Adjustment Type/Billable Charge Line Type** field. On clicking the **Search** icon, the **Adjustment Type/Billable Charge Line Type Search** window appears.	Yes (Conditional) **Note:** This field is required when you are defining accumulation amendment details in an off-process request type.

2. Enter the required details in the **Accumulation Amendment Details** section.
3. If you want to define more than one accumulation amendment details for the off-process request type, click the **Add** (+) icon and then *r*epeat step *2*.

Note: However, if you want to remove an accumulation amendment detail(s) from the off-process request type, click the **Delete** (🗑) icon corresponding to the accumulation amendment details.

Related Topics

For more information on...	See...
How to add an off-process request type	Defining an Off-Process Request Type on page 3653
How to edit an off-process request type	Editing an Off-Process Request Type on page 3657
How to copy an off-process request type	Copying an Off-Process Request Type on page 3660

Defining a Characteristic for an Off-Process Request Type

Prerequisites

To define a characteristic for an off-process request type, you should have:

- Characteristic types defined in the application (where the characteristic entity is set to **Off-Process Request**)

Procedure

To define a characteristic for an off-process request type:

1. Ensure that the **Characteristics** section is expanded when you are defining, editing, or copying an off-process request type.

   The **Characteristics** section contains the following fields in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Characteristic Type	Used to indicate the characteristic type.	Yes (Conditional)

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The list includes only those characteristic types where the characteristic entity is set to **Off-Process Request**.	**Note:** This field is required when you are defining a characteristic for the off-process request type.
Characteristic Value	Used to specify the value for the characteristic type.	Yes (Conditional)
	Note: If you select a predefined characteristic type, the **Search** (🔍) icon appears corresponding to the **Characteristic Value** field. On clicking the **Search** icon, the **Predefined Characteristic Search** window appears. On specifying the value for a predefined characteristic type, the description of the characteristic value appears corresponding to the **Characteristic Value** field.	**Note:** This field is required when you are defining a characteristic for the off-process request type.

2. Enter the required details in the **Characteristics** section.
3. If you want to define more than one characteristic for the off-process request type, click the **Add** (+) icon and then *r*epeat step *2*.

Note: However, if you want to remove a characteristic from the off-process request type, click the **Delete** (🗑) icon corresponding to the characteristic.

Related Topics

For more information on...	See...
How to define an off-process request type	Defining an Off-Process Request Type on page 3653
How to edit an off-process request type	Editing an Off-Process Request Type on page 3657
How to copy an off-process request type	Copying an Off-Process Request Type on page 3660

Editing an Off-Process Request Type

Prerequisites

To edit an off-process request type, you should have:

- Off-process request business objects defined in the application
- Adjustment type and billable charge line type defined in the application
- Required approval profiles defined in the application
- A To Do role assigned to the **C1-OFPAP** To Do type in the application
- Accumulation category defined in the application
- Amendment field and amendment mode defined in the application
- Contract type defined in the application
- Off-process request type status defined in the application

Procedure

To edit an off-process request type:

1. Click the **Admin** link in the **Application** toolbar.

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A list appears.

2. From the **Admin** menu, select **O** and then click **Off-Process Request Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Off-Process Request Type** sub-menu.
   The **Off-Process Request Type** screen appears.
4. In the **Off-Process Request Type List** zone, click the **Edit** (✎) icon in the **Edit** column corresponding to the *o*ff-process request type whose details you want to edit.

   The **Off-Process Request Type** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details about the off-process request type.
   - **Characteristics** - Used to define the characteristics for the off-process request type.

   The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Off-Process Request Type	Displays the off-process request type.	Not applicable
Business Object	Indicates the business object using which you are defining the off-process request type.	Not applicable
Description	Used to specify the description for the off-process request type.	Yes
Off-Process Request Business Object	Used to indicate the business object using which you want to create the off-process request.	Yes
Detailed Description	Used to specify additional information about the off-process request type.	No
Status	Used to indicate the status of the off-process request type. The valid values are: • Active • Inactive **Note:** You cannot change the status of an off-process request type to **Inactive** when the corresponding off-process request is in a status other than **Processed** or **Rejected**. If you do not specify the status, by default, it is set to **Active**.	Yes
Amendment Mode	Used to indicate the amendment mode selected for the off-process request type. The valid values are: • Adjustment • Billable Charge	Yes
Approval Required	Used to indicate whether the approval is required before generating adjustments or billable charges through an off-process request.	No
Approval To Do Type	Used to indicate that To Do entry of the specified To Do type must be created when an off-process request is submitted for approval.	Yes (Conditional)

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The **Search** icon appears corresponding to the **Approval To Do Type** field. On clicking the **Search** icon, the **To Do Type Search** window appears. On specifying the To Do type, the description of the To Do type appears corresponding to the Approval To Do Type field. This field appears when the **Approval Required** option is selected.	**Note:** This field is required when the **Approval Required** option is selected.
Approval To Do Role	Used to indicate that users with the specified To Do role can only approve an off-process request submitted for approval.	Yes (Conditional)
	Note: The list includes only those To Do roles which are associated to the specified approval To Do type. This field appears only when the **Approval Required** option is selected.	**Note:** This field is required when the **Approval Required** option is selected.

Tip: Alternatively, you can edit the details of a off-process request type by clicking the **Edit** button in the **Off-Process Request Type** zone.

5. Modify the details in the **Main** section, if required.
6. Define, edit, or remove accumulation amendment details from the off-process request type, if required.
7. Define, edit, or remove characteristics of the off-process request type, if required.
8. Click **Save**.
   The changes made to the off-process request type are saved.

Related Topics

For more information on...	See...
Off-Process Request Type screen	Off-Process Request Type on page 3649
Off-Process Request Type List zone	Off-Process Request Type List on page 3650
Off-Process Request Type zone	Off-Process Request Type on page 3650
How to add accumulation details for an off-process request type	Adding the Accumulation Amendment Details in an Off-Process Request Type on page 3655
How to define a characteristic for an off-process request type	Defining a Characteristic for an Off-Process Request Type on page 3656

Deleting an Off-Process Request Type

Procedure

To delete an off-process request type:

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1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **O** and then click **Off-Process Request Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Off-Process Request Type** sub-menu.
   The **Off-Process Request Type** screen appears.
4. In the **Off-Process Request Type List** zone, click the **Delete** (🗑) icon in the **Delete** column corresponding to the *o*ff-process request type that you want to delete.

   A message appears confirming whether you want to delete the off-process request type.

   Note: You can delete an off-process request type when you have not created an off-process request using the off-process request type.

   Tip: Alternatively, you can delete an off-process request type by clicking the **Delete** button in the **Off-Process Request Type** zone.
5. Click **OK**.
   The off-process request type is deleted.

Related Topics

For more information on...	See...
Off-Process Request Type screen	Off-Process Request Type on page 3649
Off-Process Request Type List zone	Off-Process Request Type List on page 3650
Off-Process Request Type zone	Off-Process Request Type on page 3650

Copying an Off-Process Request Type

Instead of creating an off-process request type from scratch, you can create a new off-process request type using an existing off-process request type. This is possible through copying an off-process request type. On copying an off-process request type, the details including the characteristics are copied to the new off-process request type. You can then edit the details, if required.

Prerequisites

To copy an off-process request type, you should have:

- Off-process request type (whose copy you want to create) defined in the application
- Off-process request business objects defined in the application
- Required approval profiles defined in the application
- A To Do role assigned to the **C1-OFPAP** To Do type in the application
- Accumulation category defined in the application
- Amendment field and amendment mode defined in the application
- Contract type defined in the application
- Adjustment type and billable charge line type defined in the application
- Off-process request type status defined in the application

Procedure

To copy an off-process request type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **O** and then click **Off-Process Request Type**.

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A sub-menu appears.

3. Click the **Search** option from the **Off-Process Request Type** sub-menu.
   The **Off-Process Request Type** screen appears.
4. In the **Off-Process Request Type List** zone, click the **Duplicate** (⧉) icon in the **Duplicate** column corresponding to the off-process request type whose copy you want to create.

   The **Off-Process Request Type** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details about the off-process request type.
   - **Characteristics** - Used to define the characteristics for the off-process request type.

   The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Off-Process Request Type	Used to specify the off-process request type.	Yes
Business Object	Indicates the business object using which you are defining the off-process request type.	Not applicable
Description	Used to specify the description for the off-process request type.	Yes
Off-Process Request Business Object	Used to indicate the business object using which you want to create the off-process request.	Yes
Detailed Description	Used to specify additional information about the off-process request type.	No
Off-Process Request Business Object	Used to indicate the business object using which you want to create the respective off-process request type.	Yes
Status	Used to indicate the status of the off-process request type. The valid values are: • Active • Inactive **Note:** You cannot change the status of an off-process request type to **Inactive** when the corresponding off-process request is in a status other than **Processed** or **Rejected**. If you do not specify the status, by default, it is set to **Active**.	Yes
Amendment Mode	Used to indicate the amendment mode selected for the off-process request type. The valid values are: • Adjustment • Billable Charge	Yes
Approval Required	Used to indicate whether the approval is required before generating adjustments or billable charges through an off-process request.	No
Approval To Do Type	Used to indicate that To Do entry of the specified To Do type must be created when an off-process request is submitted for approval.	Yes (Conditional)

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The **Search** icon appears corresponding to the **Approval To Do Type** field. On clicking the **Search** icon, the **To Do Type Search** window appears. On specifying the To Do type, the description of the To Do type appears corresponding to the Approval To Do Type field. This field appears when the **Approval Required** option is selected.	**Note:** This field is required when the **Approval Required** option is selected.
Approval To Do Role	Used to indicate that users with the specified To Do role can only approve an off-process request submitted for approval.	Yes (Conditional)
	Note: The list includes only those To Do roles which are associated to the specified approval To Do type. This field appears only when the **Approval Required** option is selected.	**Note:** This field is required when the **Approval Required** option is selected.

Tip: Alternatively, you can copy an off-process request type by clicking the **Duplicate** button in the **Off-Process Request Type** zone.

5. Enter the required details in the **Main** section.
6. Define, edit, or remove the accumulation amendment details from the off-process request type, if required.
7. Define, edit, or remove characteristics of the off-process request type, if required.
8. Click **Save**.
   The new off-process request type is defined.

Related Topics

For more information on...	See...
Off-Process Request Type screen	Off-Process Request Type on page 3649
Off-Process Request Type List zone	Off-Process Request Type List on page 3650
Off-Process Request Type zone	Off-Process Request Type on page 3650
How to add accumulation details to an off-process request type	Adding the Accumulation Amendment Details in an Off-Process Request Type on page 3655
How to define a characteristic for an off-process request type	Defining a Characteristic for an Off-Process Request Type on page 3656

Viewing the Off-Process Request Type Details

Procedure

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To view the details of an off-process request type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **O** and then click **Off-Process Request Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Off-Process Request Type** sub-menu.
   The **Off-Process Request Type** screen appears.
4. In the **Off-Process Request Type List** zone, click the **Broadcast** (ᯤ) icon corresponding to the off-process request *t*ype whose details you want to view.
   The **Off-Process Request Type** zone appears.
5. View the details of the off-process request type in the **Off-Process Request Type** zone.

Related Topics

For more information on...	**See...**
Off-Process Request Type screen	Off-Process Request Type on page 3649
Off-Process Request Type List zone	Off-Process Request Type List on page 3650
Off-Process Request Type zone	Off-Process Request Type on page 3650

Off-Process Request (Used for Searching)

The **Off-Process Request** screen allows you to search for an off-process request using various search criteria. It also allows you to define an off-process request. It contains the following zone:

- Search Off-Process Request on page 3663

Through this screen, you can navigate to the following screen:

- Off-Process Request (Used for Viewing) on page 3668

Search Off-Process Request

The **Search Off-Process Request** zone allows you to search for an off-process request using various search criteria. It contains the following two sections:

- **Search Criteria** - The **Search Criteria** section contains the following fields:

Field Name	**Field Description**	**Mandatory (Yes or No)**
Search By	Used to indicate whether you want to search for an off-process request using the off-process request or adjustment/billable charge details. The valid values are: • Request Details • Adjustment/Billable Charge Details **Note:** By default, the **Request Details** option is selected.	Yes
Off-Process Request ID	Used to search a particular off-process request.	No
Created From	Used to search off-process requests which are created from a particular date onwards.	No

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Field Name	Field Description	Mandatory (Yes or No)
	Note: This field appears when the **Request Details** option is selected from the **Search By** list.	
Created Until	Used to search off-process requests which are created till a particular date. **Note:** This field appears when the **Request Details** option is selected from the **Search By** list.	No
Off-Process Request Type	Used to search off-process requests using a particular off-process request type.	No
Status	Used to search off-process requests with a particular status. The valid values are: • Approval In Progress • Draft • Processed • Rejected **Note:** This field appears when the **Request Details** option is selected from the **Search By** list.	No
Parent Person ID	Used to search off-process requests which include adjustments or billable charges of a particular parent person. **Note:** The **Search** icon appears corresponding to the **Parent Person ID** field. On clicking the **Search** icon, the **Person Search** window appears. This field appears when the **Request Details** option is selected from the **Search By** list.	No
Creation Mode	Used to search off-process requests which are created using a particular mode. The valid values are: • Automatic • Manual **Note:** This field appears when the **Request Details** option is selected from the **Search By** list.	No

Note: You must specify at least one search criterion while searching for an off-process request.

- **Search Results** - On clicking the **Search** button, the search results appear based on the specified search criteria. The **Search Results** section contains the following columns:

Column Name	Column Description
Creation Date Time	Displays the date and time when the off-process request is created.
Off-Process Request Information	Indicates the information about the off-process request.

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Column Name	Column Description
	Note: It has a link. On clicking the link, the **Off-Process Request** screen appears where you can view the details of the respective off-process request.
Parent Person Information	Indicates the information about the parent person. In addition, this column has a context menu which helps in navigating to other screens in the application.
	Note: It has a link. On clicking the link, the **Person** screen appears where you can view the details of the respective person.
Created By	Indicates the user who has created the off-process request.
Status	Indicates the status of the off-process request. The valid values are: • Approval In Progress • Draft • Processed • Rejected
Creation Mode	Indicates how the off-process request is created. The valid values are: • Automatic • Manual

Note: Pagination is used to display limited number of records in the **Search Results** section. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

Related Topics

For more information on...	See...
How to search for an off-process request	Searching for an Off-Process Request on page 3665
How to view the off-process request details of an off-process request	Viewing the Off-Process Request Details of an Off-Process Request on page 3667
How to create an off-process request	Defining an Off-Process Request on page 3666

Searching for an Off-Process Request

Prerequisites

To search for an off-process request, you should have:

- Off-process request types defined in the application

Procedure

To search for an off-process request:

1. Click the **Menu** link in the **Application** toolbar.
   A list appears.
2. From the **Main** menu, select **Transaction and Audit Event Management** and then click **Off-Process Request**.
   A sub-menu appears.
3. Click the **Search** option from the **Off-Process Request** sub-menu.
   The **Off-Process Request** screen appears.
4. Enter the search criteria in the **Search-Off Process Request** zone.

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> **Note:** ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.

5. Click **Search**.
   A list of off-process requests that meet the search criteria appears in the **Search Results** section.

Related Topics

For more information on...	See...
Off-Process Request screen	Off-Process Request (Used for Searching) on page 3663
Search Off-Process Request zone	Search Off-Process Request on page 3663

Defining an Off-Process Request

Prerequisites

To create an off-process request, you should have:

- Off-Process request types defined in the application
- Accumulation category and accumulation group defined in the application
- Amendment field defined in the application
- Persons defined in the application
- Account ID defined in the application
- Characteristic types defined in the application
- Adjustment types or billable charge line types defined in the application

Procedure

To create an off-process request:

1. Click the **Menu** link in the **Application** toolbar.
   A list appears.
2. From the **Main** menu, select **Transaction and Audit Event Management** and then click **Off-Process Request**.
   A sub-menu appears.
3. Click the **Add** option from the **Off-Process Request** sub-menu.

   The **Add Off-Process Request** screen appears. It contains the following field:

Field Name	Field Description	Mandatory (Yes or No)
Off-Process Request Type	Used to indicate the off-process request type using which you want to create the off-process request.	Yes

> **Tip:** Alternatively, you can access this screen by clicking the **Add** button in the **Page Title** area of the **Off-Process Request** screen.

4. Select the required off-process request type from the **Off-Process Request Type** field.
5. Click **OK**.
   The **Off-Process Request** screen appears. It contains the following sections:
   - **Main** - Used to specify basic details about the off-process request.
   - **Off-Process Request Information** - Used to specify the off-process request information.

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- **Characteristics** - Used to define the characteristics for the off-process request.

The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Off-Process Request Type	Indicates the off-process request type using which you want to create the off-process request.	Not applicable
Creation Mode	Indicates the mode in which the offset request is created. The valid values are: • Automatic • Manual	Not applicable
Parent Person Id	Used to indicate the parent customer (.e. person whose person type is set to **Parent Customer**) for which you want to create an off-process request. **Note:** The **Search** (🔍) icon appears corresponding to the **Parent Person ID** field. On clicking the **Search** icon, the **Parent Customer Search** window appears. On specifying the parent person, the description of the parent person appears corresponding to the **Parent Person ID** field.	Yes
Comments	Used to specify the comments for an off-process request.	No

6. Enter the required details in the **Main** section.
7. Add the accumulation amendment details in the off-process request, if required.
8. Define characteristics for the off-process request, if required.
9. Click **Save**.
   The off-process request is created in the **Draft** status.

Related Topics

For more information on...	See...
Off-Process Request screen	Off-Process Request (Used for Viewing) on page 3668
How to add the off-process request details in an off-process request	Adding the Off-Process Request Details in an Off-Process Request on page 3673
How to define a characteristic for an off-process request information	Defining a Characteristic for an Off-Process Request on page 3676

Viewing the Off-Process Request Details of an Off-Process Request

Procedure

To view the off-process request details of an off-process request:

1. Search for the off-process request in the **Off-Process Request** screen.
2. In the **Search Results** section, click the link in the **Off-Process Request Information** column corresponding to *t*he off-process request whose details you want to view.
   The **Off-Process Request** screen appears.

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3. Ensure that the **Main** tab is selected.
4. View the details of the off-process request in the **Off-Process Request** zone.
5. View the accumulation and amendment details in the **Off-Process Request Details** zone.

Related Topics

For more information on...	See...
How to search for an off-process request	Searching for an Off-Process Request on page 3665
Off-Process Request screen	Off-Process Request (Used for Searching) on page 3663
Off-Process Request zone	Off-Process Request on page 3668
Off-Process Request Details zone	Off-Process Request Details on page 3670

Off-Process Request (Used for Viewing)

The **Off-Process Request** screen allows you to:

- View the details of the off-process request
- Edit the details of the off-process request
- Delete the off-process request
- Submit the off-process request for processing
- Approve or reject the off-process request
- View the error message of the off-process request
- View the log of the off-process request
- Add a log entry for the off-process request

It consists of the following tabs:

- Off-Process Request - Main on page 3668
- Off-Process Request - Log on page 3672

Off-Process Request - Main

The **Main** tab displays information about the off-process request. It contains the following zones:

- Off-Process Request on page 3668
- Off-Process Request Details on page 3670
- Off-Process Request Error Message on page 3672

Related Topics

For more information on...	See...
How to view the off-process request details of an off-process request	Viewing the Off-Process Request Details of an Off-Process Request on page 3667
How to view the error message of an off-process request	Viewing the Error Message of an Off-Process Request on page 3673

Off-Process Request

The **Off-Process Request** zone displays the details of the off-process request. It contains the following sections:

- **Main** - Displays basic information about the off-process request. It contains the following fields:

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Field Name	Field Description
Off-Process Request Information	Displays information about the off-process request.
Off-Process Request Type	Indicates the off-process request type using which the off-process request is created. **Note:** It has a link. On clicking the link, the **Off-Process Request Type** screen appears where you can view the details of the respective off-process request type.
Parent Person	Indicates the parent person for whom the off-process request is created.
Status	Indicates the status of the off-process request. The valid values are: • Approval In Progress • Draft • Processed • Rejected
Creation Mode	Indicates whether the off-process request is created automatically or manually. The valid values are: • Automatic • Manual

- **Record Actions** - This section contains the following buttons:

Button Name	Button Description
Edit	Used to edit the details of the off-process request. **Note:** The **Edit** button appears when the off-process request is in the **Draft** status.
Delete	Used to delete the off-process request. **Note:** The **Delete** button appears when the off-process request is in the **Draft** status.
Submit	Used to submit the off-process request. **Note:** The **Submit** button appears when the off-process request is in the **Draft** status.
Approve	Used to approve the off-process request. **Note:** The **Approve** button appears when: • The off-process request is in the **Approval In Progress** status. • A user with the approval To Do role is reviewing the off-process request.
Reject	Used to reject the off-process request. **Note:** The **Reject** button appears when: • The off-process request is in the **Approval In Progress** status. • A user with the approval To Do role is reviewing the off-process request.

- **Record Information** - This section contains the following fields:

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Field Name	Field Description
Business Object	Indicates the business object using which the off-process request is created. In addition, a context menu appears corresponding to this field which helps in navigating to other screens in the application. **Note:** It has a link. On clicking the link, the **Business Object** screen appears where you can view the details of the respective business object.
Status Date/Time	Displays the date and time when the off-process request status is updated
Create Date/Time	Displays the date and time when the off-process request is created.

- **Characteristics** - Lists the characteristics defined for the off-process request. It contains the following columns:

Column Name	Column Description
Effective Date	Displays the date from when the characteristic is effective for the off-process request.
Characteristic Type	Indicates the characteristic type.
Characteristic Value	Displays the value of the characteristic type.

Related Topics

For more information on...	See...
How to edit an off-process request	Editing an Off-Process Request on page 3677
How to delete an off-process request	Deleting an Off-Process Request on page 3678
How to submit an off-process request	Submitting an Off-Process Request on page 3679
How to approve an off-process request	Approving an Off-Process Request on page 3679
How to reject an off-process request	Rejecting an Off-Process Request on page 3681

Off-Process Request Details

The **Off-Process Request Details** zone lists the accumulation and amendment details of the off-process request. This zone contains the following columns:

Column Name	Column Description
Accumulation Category	Displays the category whose field value is amended through an off-process request. The valid values are: • Aggregate Stop Loss • Discount Arrangement • Level Funded • Specific Stop-Loss
Accumulation Group ID	Indicates the accumulation group for which the (accumulation and amendment) changes are reflected in the system.
Amendment Field	Indicates the accumulation field whose value is amended through the off-process request. The valid values are: • ASL Limit • Aggregated Amount

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Column Name	Column Description
	• Cumulative ASL Credit • Cumulative SSL Credit • Maximum Limit • Minimum Limit • Run Out Fund • Settlement Fund
Off-Process Amount	Displays the amount which is amended through the off-process request.
Member/Subscriber ID	Displays the member or the main subscriber for whom the field value is amended in the system.
Status	Displays the current status of the off-process request.
Account Information	Indicates the account for which the adjustment or billable charge is created in the system. In addition, a context menu appears corresponding to this field which helps in navigating to other screens in the application. **Note:** It has a link. On clicking the link, the **Account** screen appears where you can view the details of the respective account.
Effective Date	Indicates the date when the field value is amended in the system.
Coverage Start Date	Indicates the date from when the amendment is applicable for the off-process request.
Coverage End Date	Indicates the date till when the amendment is applicable for the off-process request.
Adjustment Type	Indicates the adjustment type using which the adjustment should be created when the amendment mode is set to **Adjustment** in the respective off-process request type.
Adjustment Information	Displays information about the adjustment. **Note:** It has a link. On clicking the link, the **Adjustment** screen appears where you can view the details of the respective adjustment.
Billable Charge Line Type	Indicates the billable charge line type using which the billable charge should be created when the amendment mode is set to **Billable Charge** in the respective off-process request type.
Billable Charge Information	Displays information about the billable charge. **Note:** It has a link. On clicking the link, the **Billable Charge** screen appears where you can view the details of the respective billable charge.

On clicking the **Broadcast** (ᯤ) icon corresponding to an off-process request detail record, the **Error Message** zone is displayed.

Note:

Pagination is used to display limited number of records in the **Search Results** section. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

You can filter the list using **Record Status** field as the search criteria available in the **Filter** area. By default, the **Filter** area is hidden. You can view the **Filter** area by clicking the **Filters** (▽) icon in the upper right corner of this zone.

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Related Topics

For more information on...	See...
How to view the off-process request details of an off-process request	Viewing the Off-Process Request Details of an Off-Process Request on page 3667

Off-Process Request Error Message

The **Error Message** zone displays the error message of an off-process request. It contains the following column:

Column Name	Column Description
Error Message	Displays the error message indicating the error that occurred while executing an off-process request.

Note: This zone appears when the **Status** column in the Off-Process Request Details zone displays the status as **Error**.

Related Topics

For more information on...	See...
How to view the error message of an off-process request	Viewing the Error Message of an Off-Process Request on page 3673

Off-Process Request - Log

The **Log** tab contains the following zone:

- Off-Process Request Log on page 3672

Related Topics

For more information on...	See...
How to view the log of an off-process request	Viewing the Log of an Off-Process Request on page 3682
How to add a log entry for an off-process request	Adding a Log Entry for an Off-Process Request on page 3682

Off-Process Request Log

The **Off-Process Request Log** zone lists the complete trail of actions performed on the off-process request. It contains the following columns:

Column Name	Column Description
Creation Date/Time	Displays the date and time when the action was performed on the off-process request.
Details	Displays the details of the action performed on the off-process request.
User	Indicates the user who has performed the action on the off-process request.
Log Type	Indicates the type of log.
Related Object	Indicates the object or entity which is created when the action is performed on the off-process request.

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Column Name	Column Description
	Note: At present, no data appears in this column. The implementation team can build the custom logic to meet the business requirements.
Status Reason	Indicates the reason why the off-process request was rejected by the approver.
	Note: The data appears in this column when the off-process request is in the **Rejected** status.

Note: You can manually add a log entry for the off-process request by clicking the **Add Log Entry** link in the upper right corner of the **Off-Process Request Log** zone.

Related Topics

For more information on...	See...
How to view the log of an off-process request	Viewing the Log of an Off-Process Request on page 3682
How to add a log entry for an off-process request	Adding a Log Entry for an Off-Process Request on page 3682

Viewing the Error Message of an Off-Process Request

Procedure

To view the error message of an off-process request:

1. Search for the off-process request in the **Off-Process Request** screen.
2. In the **Search Results** section, click the link in the **Off-Process Request Information** column corresponding to *t*he off-process request whose details you want to view.
   The **Off-Process Request** screen appears.
3. Ensure that the **Main** tab is selected.
4. In **Off-Process Request Details** zone, click the **Broadcast** (⦾) icon corresponding to the off-process request *w*hose error message you want to view.
   The **Error Message** zone appears.
5. View the error message of the off-process request in the **Error Message** zone.

Related Topics

For more information on...	See...
How to search for an off-process request	Searching for an Off-Process Request on page 3665
Off-Process Request screen	Off-Process Request (Used for Searching) on page 3663
Off-Process Request - Main tab	Off-Process Request - Main on page 3668
Error Message zone	Off-Process Request Error Message on page 3672

Adding the Off-Process Request Details in an Off-Process Request

Prerequisites

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To add the off-process request details in an off-process request, you should have:

- Off-process request types defined in the application
- Categories defined in the application (where the characteristic entity is set to **Off-Process Request**)
- Applicable adjustments and billable charge line types defined in the application.

Procedure

To add the off-process request details in an off-process request:

1. Ensure that the **Off-Process Request Details** section is expanded when you are editing an off-process request.

   The **Off-Process Request Details** section contains the following fields in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Accumulation Category	Used to indicate the accumulation category whose field value you want to amend through the off-process request. The valid values are: • Aggregate Stop Loss • Discount Arrangement • Level Funded • Specific Stop-Loss	Yes
Accumulation Group ID	Used to indicate the accumulation group for which the (accumulation and amendment) changes should be reflected in the system. **Note:** The **Search** (🔍) icon appears corresponding to the **Accumulation Group ID** field. On clicking the **Search** icon, the **Accumulation Group Search** window appears. On specifying the accumulation group Id, the description of the accumulation group Id appears corresponding to the **Accumulation Group ID** field. If the accumulation category is set to **Specific Stop-Loss**, you can only select the accumulation group defined at the bill group level. However, if the accumulation category is set to **Aggregate Stop-Loss**, **Discount Arrangement**, or **Level Funded**, you can only select the accumulation group defined at the parent customer level.	No
Amendment Field	Used to indicate the accumulation field whose value you want to amend through the off-process request. The valid values are: • ASL Limit • Aggregated Amount • Cumulative ASL Credit • Cumulative SSL Credit • Maximum Limit • Minimum Limit • Run Out Fund • Settlement Fund	Yes (Conditional) **Note:** This field is required when you select the **Accumulation Category** for the off-process request.

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Field Name	Field Description	Mandatory (Yes or No)
	Note: You can select only those accumulation categories and fields for which the contract type and adjustment type or billable charge line type information is available in the respective off-process request type.	
Account ID	Used to indicate the account for which the adjustment or billable charge should be created in the system. **Note:** The account ID and the account information appear automatically when you select the appropriate option from the **Amendment Field** field. The **Search** (🔍) icon appears corresponding to the **Account ID** field. On clicking the **Search** icon, the **Account Search** window appears. On specifying the account ID, the description of the account appears corresponding to the **Account ID** field.	Yes (Conditional) **Note:** This field is required when you select the **Accumulation Group ID** for the off-process request.
Off-Process Amount	Used to specify the amount which you want amend through the off-process request.	Yes (Conditional) **Note:** This field is required when you select the **Accumulation Category** for the off-process request.
Adjustment Type/ Billable Charge Line Type	Used to indicate the adjustment type or billable charge line type using which the adjustment or billable charge should be created when the amendment mode is set to **Adjustment** or **Billable Charge** in the respective off-process request type. **Note:** The **Search** (🔍) icon appears corresponding to the **Adjustment Type/Billable Charge Line Type** field. On clicking the **Search** icon, the **Adjustment Type/Billable Charge Line Type Search** window appears. On specifying the value for a predefined adjustment type or billable charge line type, the description of the adjustment type or billable charge line type appears corresponding to the **Adjustment Type/Billable Charge Line Type Search** field. Once the **Amendment Field** is selected, its respective adjustment type or billable charge line type appears in the **Adjustment Type/Billable Charge Line Type** field.	Yes (Conditional) **Note:** This field is required when you select the **Accumulation Category** for the off-process request.
Member/Subscriber ID	Used to specify member or the main subscriber for whom the field value should be amended in the system.	No

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Field Name	Field Description	Mandatory (Yes or No)
Effective Date	Used to indicate the date from when the field value should be amended in the system.	Yes (Conditional) **Note:** This field is required when you select the **Accumulation Category** for the off-process request.
Coverage Start Date	Used to indicate the date from when the amendment is applicable for the off-process request.	No
Coverage End Date	Used to indicate the date till when the amendment is applicable for the off-process request.	No

2. Enter the required details in the **Off-Process Request Details** section.
3. If you want to define more than one off-process request detail for the off-process request, click the **Add** (+) icon and then *r*epeat step *2*.

Note: However, if you want to remove an off-process request detail from the off-process request, click the **Delete** (🗑) icon corresponding to the off-process request detail.

Related Topics

For more information on...	See...
How to define an off-process request	Defining an Off-Process Request on page 3666
How to edit an off-process request	Editing an Off-Process Request on page 3677

Defining a Characteristic for an Off-Process Request

Prerequisites

To define a characteristic for an off-process request, you should have:

- Off-process request types defined in the application
- Characteristic types defined in the application (where the characteristic entity is set to **Off-Process Request**)

Procedure

To define a characteristic for an off-process request:

1. Ensure that the **Characteristics** section is expanded when you are defining, editing, or copying an off-process request.

   The **Characteristics** section contains the following fields in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Effective Date	Used to specify the date from when the characteristic is effective for the off-process request.	Yes (Conditional) **Note:** This field is required when you are defining a characteristic for the off-process request.
Characteristic Type	Used to indicate the characteristic type.	Yes (Conditional)

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The list includes only those characteristic types where the characteristic entity is set to **Off-Process Request**.	**Note:** This field is required when you are defining a characteristic for the off-process request.
Characteristic Value	Used to specify the value for the characteristic type.	Yes (Conditional) **Note:** This field is required when you are defining a characteristic for the off-process request.

2. Enter the required details in the **Characteristic** section.
3. If you want to define more than one characteristic for the off-process request, click the **Add** (+) icon and then *r*epeat step *2*.

Note: However, if you want to remove a characteristic from the off-process request, click the **Delete** (🗑) icon corresponding to the off-process request information.

Related Topics

For more information on...	See...
How to edit an off-process request	Editing an Off-Process Request on page 3677

Editing an Off-Process Request

Procedure

To edit an off-process request:

1. Search for the off-process request in the **Off-Process request** screen.
2. In the **Search Results** section, click the link in the **Off-Process Request Information** column corresponding to *t*he off-process request whose details you want to edit.
   The **Off-Process Request** screen appears.
3. Click the **Edit** button in the **Off-Process Request** zone.

Note: The **Edit** button appears only when the off-process request is in the **Draft** status.

The **Edit Off-Process Request** screen appears. It contains the following sections:

- **Main** - Used to specify basic details about the off-process request.
- **Off-Process Request Information** - Used to specify the off-process request information.
- **Characteristics** - Used to define the characteristics for the off-process request.

The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Off-Process Request Information	Displays information about the off-process request.	Not applicable
Off-Process Request Type	Indicates the off-process request type.	Not applicable

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Field Name	Field Description	Mandatory (Yes or No)
Creation Mode	Indicates the mode in which the offset request is created. The valid values are: • Automatic • Manual	Not applicable
Parent Person ID	Indicates the parent customer (.e. person whose person type is set to **Parent Customer**) whose off-process request you want to edit.	No
Comments	Used to specify the comments for an off-process request	No

4. Modify the details of the off-process request, if required.
5. Define, edit, or remove off-process request details from the off-process request, if required.
6. Define, edit, or remove characteristics of the off-process request, if required.
7. Click **Save**.
   The changes made to the off-process request are saved.

Related Topics

For more information on...	See...
How to search for an off-process request	Searching for an Off-Process Request on page 3665
Off-Process Request screen	Off-Process Request (Used for Searching) on page 3663
Off-Process Request zone	Off-Process Request on page 3668
How to define a characteristic for an off-process request	Defining a Characteristic for an Off-Process Request on page 3676

Deleting an Off-Process Request

Procedure

To delete an off-process request:

1. Search for the off-process request in the **Off-Process Request** screen.
2. In the **Search Results** section, click the link in the **Off-Process Request Information** column corresponding to *t*he off-process request that you want to delete.
   The **Off-Process Request** screen appears.
3. Click the **Delete** button in the **Off-Process Request** zone.
   A message appears confirming whether you want to delete the off-process request.

> **Note:** The **Delete** button appears when the off-process request is in the **Draft** status.

4. Click **OK**.
   The off-process request is deleted.

Related Topics

For more information on...	See...
How to search for an off-process request	Searching for an Off-Process Request on page 3665
Off-Process Request screen	Off-Process Request Type on page 3649

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For more information on...	See...
Off-Process Request zone	Off-Process Request on page 3668

Submitting an Off-Process Request

Prerequisites

To submit an off-process request, you should have:

- Accumulation and amendment details defined in the off-process request
- Adjustment types or billable charge line types defined in the off-process request

Procedure

To submit an off-process request:

1. Search for the off-process request in the **Off-Process Request** screen.
2. In the **Search Results** section, click the link in the **Off-Process Request Information** column corresponding to *t*he off-process request that you want to submit.
   The **Off-Process Request** screen appears.
3. Click the **Submit** button in the **Off-Process Request** zone.

   The system behaves in the following manner:

If...	Then...
The **Approval Required** option is selected in the respective off-process request type	A To Do of the **C1-OFPAP** To Do type is created and sent to the approver. The status of the Off-Process Request is then changed to **Approval In Progress**. Once the approver approves the off-process request, the status of the off-process request is changed to **Approved**. The system then creates the adjustments or billable charges to amend the accumulation field values. Finally, the status of the off-process request is changed to **Processed**.
The **Approval Required** option is not selected in the respective off-process request type	The system creates the adjustments or billable charges to amend the accumulation field values. Finally, the status of the off-process request is changed to **Processed**.

Note: The **Submit** button appears when the off-process request is in the **Draft** status.

Related Topics

For more information on...	See...
How to search for an off-process request	Searching for an Off-Process Request on page 3665
Off-Process Request screen	Off-Process Request (Used for Searching) on page 3663
Off-Process Request zone	Off-Process Request on page 3668

Approving an Off-Process Request

You can view the number of off-process requests which are pending for approval in the **Off-Process Request** screen. The approver can review, and accordingly approve, reject, or submit the off-process request based on the observations.

Note: The system will not allow you to approve, reject or submit an off-process request submitted by you.

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Procedure

To approve an off-process request:

1. Do either of the following:

If you want to...	Then...
Approve an off-process request through the **Off-Process Request** screen	**a.** Search for the off-process request in the **Off-Process Request** screen. **b.** In the **Search Results** section, click the link in the **Off-Process Request Information** column corresponding to the off-process request which you want to review.
Approve an off-process request from the **To Do List** screen	**a.** Click the **Menu** link in the **Application** toolbar. A list appears. **b.** From the **Main** menu, select **To Do** and then click **To Do List**. The **To Do Type for User Search** window appears. **c.** Enter **C1-OFPAP** in the **To Do Type** field. **d.** Click the **Search** button corresponding to the **To Do Type** field. The **To Do List** screen appears. **e.** Select the **Open** option from the **Filter by** list to view all unassigned To Dos. **f.** Click the link in the **Message** column corresponding to the To Do of the off-process request that you want to review.

   The **Off-Process Request** screen appears.
2. Review the off-process request details in the **Off-Process Request** screen.
3. If the information in the off-process request is accurate, click the **Approve** button in the **Off-Process Request** zone.

If you are...	Then...
Approving an off-process request	The status of the off-process request is changed to **Approved**. The system then creates the adjustments or billable charges to amend the accumulation field values. Finally, the status of the off-process request is changed to **Processed**.

Note: The **Approve** button appears when:

- The off-process request is in the **Approval In Progress** status.
- A user with the approval To Do role is reviewing the off-process request.

Related Topics

For more information on...	See...
How to search for an off-process request	Searching for an Off-Process Request on page 3665
Off-Process Request screen	Off-Process Request (Used for Searching) on page 3663
Off-Process Request zone	Off-Process Request on page 3668

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Rejecting an Off-Process Request

Prerequisites

To reject an off-process request, you should have:

- Reasons defined for the **Rejected** status of the **C1-OffProcessRequest** business object in the **Status Reason** screen

Note: The system will not allow you to approve, reject or submit an off-process request submitted by you.

Procedure

To reject an off-process request:

1. Do either of the following:

If you want to...	Then...
Reject an off-process request through the **Off-Process Request** screen	**a.** Search for the off-process request in the **Off-Process Request** screen. **b.** In the **Search Results** section, click the link in the **Off-Process Request Information** column corresponding to the off-process request which you want to review.
Reject an off-process request from the **To Do List** screen	**a.** Click the **Menu** link in the **Application** toolbar. A list appears. **b.** From the **Main** menu, select **To Do** and then click **To Do List**. The **To Do Type for User Search** window appears. **c.** Enter **C1-OFPAP** in the **To Do Type** field. **d.** Click the **Search** button corresponding to the **To Do Type** field. The **To Do List** screen appears. **e.** Select the **Open** option from the **Filter by** list to view all unassigned To Dos. **f.** Click the link in the **Message** column corresponding to the To Do of the off-process request that you want to review.

   The **Off-Process Request** screen appears.
2. Review the off-process request details in the **Off-Process Request** screen.
3. If the information in the off-process request is incorrect, then click the **Reject** button in the **Off-Process Request** zone.

   The **Reject Off-Process Request** window appears. It contains following fields:

Field Name	Field Description	Mandatory (Yes or No)
Status Reason	Used to indicate the reason why you want to reject the off-process request. **Note:** The list includes only those reasons which are defined for the **Rejected** status of the **C1-OffProcessRequest** business object in the **Status Reason** screen.	Yes
Comments	Used to specify additional information while rejecting the off-process request.	No

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> **Note:** The **Reject** button appears when:
>
> - The off-process request is in the **Approval In Progress** status.
> - A user with the approval To Do role is reviewing the off-process request.

4. Select the rejection reason from the **Status Reason** list.
5. Click **Save**.
   The status of the off-process request is changed to **Rejected**.

Related Topics

For more information on...	See...
How to search for an off-process request	Searching for an Off-Process Request on page 3665
Off-Process Request screen	Off-Process Request (Used for Searching) on page 3663
Off-Process Request zone	Off-Process Request on page 3668

Viewing the Log of an Off-Process Request

Procedure

To view the log of an off-process request:

1. Search for the off-process request in the **Off-Process Request** screen.
2. In the **Search Results** section, click the link in the **Off-Process Request Information** column corresponding to *t*he off-process request whose log you want to view.
   The **Off-Process Request** screen appears.
3. Click the **Log** tab.
   The **Log** tab appears.
4. View the complete trail of actions performed on the off-process request in the **Off-Process Request Log** zone.

Related Topics

For more information on...	See...
How to search for an off-process request	Searching for an Off-Process Request on page 3665
Off-Process Request screen	Off-Process Request (Used for Searching) on page 3663
Off-Process Request Log zone	Off-Process Request Log on page 3672
How to add a log entry for an off-process request	Adding a Log Entry for an Off-Process Request on page 3682

Adding a Log Entry for an Off-Process Request

Procedure

To add a log entry for an off-process request:

1. Search for the off-process request in the **Off-Process Request** screen.
2. In the **Search Results** section, click the link in the **Off-Process Request Information** column corresponding to *t*he off-process request whose log you want to edit.
   The **Off-Process Request** screen appears.

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3. Click the **Log** tab.
   The **Log** tab appears.
4. Click the **Add Log Entry** link in the upper right corner of the **Off-Process Request Log** zone.

   The **Add Off-Process Request Log** window appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Off-Process Request Information	Displays information about the off-process request.	Not applicable
Log Details	Used to specify additional comments for the off-process request.	Yes

5. Enter the comments in the **Log Details** field.
6. Click **Save**.
   The log entry is added in the **Off-Process Request Log** zone.

Related Topics

For more information on...	See...
How to search for an off-process request	Searching for an Off-Process Request on page 3665
Off-Process Request screen	Off-Process Request (Used for Searching) on page 3663
Off-Process Request Log zone	Off-Process Request Log on page 3672

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Chapter 42

Individual Health Insurance Pricing

Topics:

- Business Rules
- Young Adult Coverage in an Individual Membership
- Age Calculation During Continuous Individual Membership Coverage

Oracle Revenue Management and Billing enables you to define pricing for different services offered in a health plan. Each service offered in a health plan should be defined as a price item in the system. For example, services may include medical insurance, home care, hospital visits, etc.

You can define the age based, tier based, or additional fee pricing for a price item using the respective pricing rule. You can create an age based, tier based, and additional fee pricing rule using the respective pricing rule type. The following pricing rule type and pricing rule business objects are enhanced to support the fully-insured individual business:

- C1-PrcRuleTypeAgeBased
- C1-PricingRuleAgeBased
- C1-PrcRuleTypeTierBased
- C1-PricingRuleTierBased
- C1-PrcRuleTypeCapitationFee
- C1-PricingRuleCapitationFee
- C1-PrcRuleTypeBenefit

You can create a pricing rule for a health plan using a pricing rule type only when the pricing rule type is associated with the health plan. The system enables you to define pricing rules for various services offered in the health plan. You must add the required price items in a pricing rule type. The system then enables you to create a pricing rule for a price item using the respective pricing rule type. While defining an age based pricing rule for a price item, you can offer different rates to different member persons based on the age, member relationship, geographic rating area, member person attributes, etc. You can also charge additional fee or given discount to a member person based on modifier attributes. For example, you may charge more premium to an alcoholic person compared to a non-alcoholic person for the same service (i.e. price item). While defining a tier based pricing rule for a price item, you can offer different rates to different memberships based on the subscription tier, geographic rating area, member person attributes, etc.

You can associate one or more pricing rule types with a health plan through a health product and plan inbound message. You can define one or more pricing rules for a health plan through a health product and plan inbound message. The system creates the pricing rule for a price item using the business object which is specified in the pricing rule type. While creating a pricing rule for a health plan, you can define pricing eligibility rules for a pricing rule. The system considers the pricing rule for an individual membership when the pricing eligibility rule (i.e. eligibility criteria) is satisfied.

The system enables you to define a pricing rule for a price item without the pricing rule eligibility. Such pricing rule is considered as a default pricing rule for the price item. If an individual membership is not eligible for any pricing

rule, the system uses the default pricing rule of the price item for the individual membership.

Note: On inactivating a health plan, the system will not automatically inactivate the pricing rules defined for the health plan.

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Business Rules

Oracle Revenue Management and Billing facilitates you to calculate the premium for each individual membership differently based on various health product, health plan, membership, or member person attributes. You can define different set of business rules for the following categories:

- **Binder Payment** - If an individual membership meets the criteria of a binder payment business rule, the system derives the following information from the business rule:
  - Binder Payment Applicability
  - Threshold Percentage
  - Grace Days
  - Hold Billing
- **Fully-Insured Pricing** - If an individual membership meets the criteria of a fully-insured pricing business rule, the system derives the following information from the business rule:
  - Maximum Age Limit of Dependents
  - Dependent Order Priority
  - Age Calculation Date
  - Age Recalculation Date
  - Young Adult Applicability
  - Young Adult Max Age Limit
  - Member Relationship Derivation Date
- **New Born** - If an individual membership meets the criteria of a new born business rule, the system derives the following information from the business rule:
  - Gift Days Applicability
  - New Born Gift Days
- **Rate Guarantee** - If an individual membership meets the criteria of a rate guarantee business rule, the system derives the following information from the business rule:
  - Rate Guarantee Applicability
  - Rate Guarantee Period
- **Refund/Write Off** - If an individual membership meets the criteria of a refund/write-off business rule, the system derives the following information from the business rule:
  - Refund Threshold Amount
  - Defer Refund (in Days)
  - Write Off Threshold Amount
  - Defer Write Off (in Days)
- **Delinquency Grace Period** - If an individual membership meets the criteria of a delinquency grace period business rule, the system derives the following information from the business rule:
  - Criteria Description
  - Effective Date
  - Status
  - Grace Period Type
  - Grace Period
- **Delinquency Event Attributes** - If an individual membership meets the criteria of a delinquency event attributes business rule, the system derives the following information from the business rule:
  - Criteria Description
  - Effective Date
  - Status
  - Wait Days

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    - Wait Month
    - Wait Day of Month
    - Send Membership Level Notification
- **Delinquency Process Type Derivation** - If an individual membership meets the criteria of a delinquency process type derivation business rule, the system derives the following information from the business rule:
    - Criteria Description
    - Effective Date
    - Status
    - Delinquency Process Type
- **Delinquency Termination Date** - If an individual membership meets the criteria of a delinquency termination date business rule, the system derives the following information from the business rule:
    - Criteria Description
    - Effective Date
    - Status
    - Termination Date Rule
- **Delinquency Miscellaneous Options** - If an individual membership meets the criteria of a delinquency miscellaneous options business rule, the system derives the following information from the business rule:
    - Criteria Description
    - Effective Date
    - Status
    - Trigger Date Recalculation On Hold Release
    - Trigger Date Recalculation On Resume
    - Trigger Termination Process
    - Immediate
    - Month End
    - After X Days
    - Termination Wait Days
    - Add Days to Coverage End Date
    - Add Days to Paid Through Date
    - Add Months to Paid Through Date
    - Add Days to Grace End Date
    - Add Days to Date of Processing of Termination Request

A business rule contains a criteria. If the criteria of the business rule is met, the information is derived from the business rule. This information is used while deriving the member relationship for a member person, subscription tier for an individual membership, and while deriving eligible member persons for premium calculation.

You can define criteria for a business rule using a set of parameters which are associated with a business rule type. The system enables you to associate only those parameters in a business rule type where the parameter usage is set to **Business Rule Eligibility Criteria**.

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

- **Business Rule Type** - Used to specify a list of parameters where the parameter usage is set to **Business Rule Eligibility Criteria**. You can then use the parameter while defining a criteria in the business rule.
- **Business Rule** - Used to search business rules of a particular category (i.e. Fully-Insured Pricing or New Born).

Binder Payment Business Rules

Oracle Revenue Management and Billing enables you to define business rules for binder payment. A new category named **Binder Payment Business Rule** is introduced in this release. The binder payment business rules are used for used for monitoring and processing the binder payments of an individual membership.

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The system derives the binder payment business rules for an individual membership while creating or editing an individual membership, or while adding, editing, or inactivating a member person in an individual membership. While deriving a business rule of the **Binder Payment Business Rule** category, the ORMB application considers the respective business rules which are effective on the membership start date. Once the effective business rules are identified, the ORMB application executes these business rules in the order of their priority.

Once the criteria of the business rule is met, the business rule is stamped against the individual membership. If two or more business rules have the same priority, the ORMB application sorts the business rules for execution, based on the business rule criteria sequence. The ORMB application derives the binder payment details for an individual membership through a binder payment business rule only when the binder payment details are not available for an individual membership in the respective table.

While defining the binder payment business rule criteria, you can use the parameters which are defined on the following entities:

- Health Plan
- Health Product
- Individual Membership
- Member Person of an Individual Membership

You can define, edit, and delete a binder payment business rule through the **Business Rule** screen. While defining a binder payment business rule, you need to set its category to **Binder Payment Business Rule**. The binder payment business rule enables you to define the following parameters:

- **Binder Payment Applicability** - Used to indicate that you want the system to monitor whether the binder payment is received or not before activating the individual membership.
- **Threshold Percentage** - Used to specify the threshold percentage using which the threshold amount should be calculated.
- **Grace Days** - Used to calculate the grace date for the individual membership.
- **Hold Billing** - Used to indicate whether you want to hold the bill generation process for the individual membership until the binder payment is received.

You can view the binder payment business rules through the **Business Rule** screen.

Fully-Insured Pricing Business Rules

Oracle Revenue Management and Billing enables you to define business rules for fully-insured pricing. A new category named **Fully-Insured Pricing Business Rule** is introduced in this release. The premium calculation process for an individual membership is described as follows:

- If you want to calculate the premium for an individual membership using an **Age Based Pricing** rule, the system derives the rate for each eligible member person. Once the rate is derived, the system identifies members that are eligible for premium calculation using the fully-insured pricing business rules. On creating or editing an individual membership through a health care inbound message or membership repricing inbound web service, the system determines the fully-insured pricing business rules which are applicable for the individual membership. If an individual membership meets the criteria of the fully-insured pricing business rule, the system then stamps the fully-insured pricing business rule corresponding to the individual membership.
- If you want to calculate the premium for an individual membership using a **Tier Based Pricing** rule, the system derives the subscription tier using the fully-insured pricing business rules. Once the premium is calculated for an individual membership, the system creates a billable charge for the premium. If the account is defined for the individual membership using the characteristic types specified in the **Account Identifier Type Char Type** and **Account Identifier Value Char Type** option types of the **C1-ASOBLLNG** feature configuration, the system uses the account to bill the charge for the premium. However, if these characteristics are not defined for the individual membership, the system considers the account of the financially responsible member person to the charge for the premium.

Note: While deriving a business rule of the **Fully-Insured Pricing Business Rule** category, the system considers the respective business rules which are effective on the audit event's effective date.

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You can define, edit, and delete a fully-insured pricing business rule through the **Business Rule** screen. While defining a fully-insured pricing business rule, you need to set its category to **Fully-Insured Pricing Business Rule**. The fully-insured pricing business rule enables you to define the following parameters:

- **Maximum Dependents** - Used to specify the maximum number of children which are eligible for premium calculation.
- **Dependent Max Age Limit** - Used to specify the maximum age limit for children eligible for premium calculation.
- **Dependent Order Priority** - Used to indicate the order priority of the dependent during premium calculation.
- **Age Calculation Date** - Used to indicate whether the member person's age should be calculated using the member person's enrollment date or policy's start or renewal date.
- **Age Recalculation Date** - Used to indicate whether the member person's age should be recalculated using the member person's enrollment date or policy's start or renewal date.
- **Young Adult Applicability** - Used to indicate that the child or dependent enrolling in the membership becomes the young adult in the enrollment period.
- **Young Adult Max Age Limit** - Used to specify the maximum age limit for young adults which are eligible for premium calculation.
- **Member Relationship Derivation Date** - Used to indicate the member relationship for a member person.

You can view the fully-insured pricing business rules through the **Business Rule** screen.

New Born Business Rules

Oracle Revenue Management and Billing enables you to define business rules for newborn pricing. A new category named **New Born Business Rule** is introduced in this release. The premium calculation process for an individual membership is described as follows:

- If you want to calculate the premium for an individual membership using an age based pricing rule, the system derives the rate for each eligible member person. Once the rate is derived, the system identifies members that are eligible for premium calculation using the newborn business rules. On creating or editing an individual membership through a health care inbound message or membership repricing inbound web service, the system determines the newborn business rules which are applicable for the individual membership. If an individual membership meets the criteria of the newborn business rule, the system then stamps the newborn business rule corresponding to the individual membership.
- If you want to calculate the premium for an individual membership using a tier based pricing rule, the system derives the subscription tier using the newborn business rules. Once the premium is calculated for an individual membership, the system creates a billable charge for the premium. If the account is defined for the individual membership using the characteristic types specified in the **Account Identifier Type Char Type** and **Account Identifier Value Char Type** option types of the **C1-ASOBLLNG** feature configuration, the system uses the account to bill the charge for the premium. However, if these characteristics are not defined for the individual membership, the system considers the account of the financially responsible member person to the charge for the premium.

> **Note:** While deriving a business rule of the **New Born Business Rule** category, the system considers the respective business rules which are effective on the audit event's effective date.

You can define, edit, and delete a newborn business rule through the **Business Rule** screen. While defining a newborn business rule, you need to set its category to **Fully-Insured Pricing Business Rule**. The newborn business rule enables you to define the following parameters:

- **Gift Days Applicability** - Used to indicate whether you want to offer gift days in case of a newborn child.
- **New Born Gift Days** - Used to specify the number of days you want to offer as gift days from the newborn child's birth date.

You can view the newborn business rules through the **Business Rule** screen.

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Rate Guarantee Business Rules

Oracle Revenue Management and Billing enables you to define a rate guarantee business rule for an individual membership. A new category named **Rate Guarantee Business Rule** is introduced in this release.

While deriving a business rule of the **Rate Guarantee Business Rule** category, the system considers the respective business rules which are effective on the membership start date. Once the effective business rules are identified, the system executes these business rules in the order of their priority. Once the criteria of the business rule is met, the business rule is stamped against the individual membership. If two or more business rules have the same priority, the system sorts the business rules for execution based the business rule criteria sequence.

While defining the rate guarantee business rule criteria, you can use the parameters which are defined on the following entities:

- Health Plan
- Health Product
- Individual Membership
- Member Person of an Individual Membership

You can define, edit, and delete a rate guarantee business rule through the **Business Rule** screen. While defining a rate guarantee business rule, you need to set its category to **Rate Guarantee Business Rule**. The rate guarantee business rule enables you to define the following parameters:

- **Rate Guarantee Applicability** - Used to indicate whether the rate guarantee is available for the individual membership.
- **Rate Guarantee Period** - Used to derive the rate guarantee start and end dates.

> **Note:** The system sets the rate guarantee start date to the membership start date and the rate guarantee end date to the rate guarantee start date + rate guarantee period.

You can view the rate guarantee business rules through the **Business Rule** screen.

Refund/Write Off Business Rules

Oracle Revenue Management and Billing enables you to define business rules to initiate automatic refund and write off. The refund/write off business rules are used while creating automatic refund/write off request for accounts when the fully insured group policy or individual membership is terminated.

While terminating a fully insured group policy or individual membership, the system derives the refund/write off business rule for the fully insured group policy or individual membership, respectively. While deriving the refund/write off business rule, the system considers the business rules with the **Refund/Write Off Business Rule** category that are effective on the termination date. Note that the system considers only those effective business rules which are in the **Active** status. The system then executes the criteria of each effective business rule and considers the business rule that meet the criteria. If two or more business rules meet the criteria, the system considers the business rule with the highest priority. The system then stamps the refund/write off business rule against the fully insured group policy or individual membership in the **C1_ENT_BUS_RULE** table.

While defining criteria for a refund/write off business rule, you can use parameters that are defined on the following source entities:

- Membership
- Membership Person
- Health Plan
- Health Product
- Policy
- Account

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You can define, edit, and delete a refund/write off business rule through the **Business Rule** screen. While defining a refund/write off business rule, you need to set the category to **Refund/Write Off Business Rule**. The refund/write off business rule enables you to define the following parameters:

- **Refund Threshold Amount** - Used to specify the threshold amount for refund. If the account balance is greater than or equal to the refund threshold amount, the system creates automatic refund for an account.
- **Defer Refund (in Days)** - Used to specify the number of days till when you want to defer automatic refund for an account. It is used to calculate the automatic refund request creation date.
- **Write Off Threshold Amount** - Used to specify the threshold amount for write off. If the account balance is less than or equal to the write off threshold amount, the system creates automatic write off for an account.
- **Defer Write Off (in Days)** - Used to specify the number of days till when you want to defer automatic write off for an account. It is used to calculate the automatic write off request creation date.

You can use the same criteria in multiple business rules to derive different set of refund/write off parameters but with different effective date. You can view the refund/write off business rules through the **Business Rule** screen.

Delinquency Grace Period Business Rule

Oracle Revenue Management and Billing enables you to define business rules to determine the grace period while monitoring delinquency at the person or account level. The insurance company may offer different grace period for different policies, direct billed group memberships, or individual memberships based on their attributes, such as health or policy plan, division, policy or membership characteristic, etc. The system will then accordingly use the grace period to calculate the following:

- Trigger dates for the delinquency events.
- Termination request date when you want to send the outbound message to the external system requesting to terminate the fully insured group policy, direct billed group membership, or individual membership, respectively.

While executing the **C1-DPEVL** batch, the system derives the business rules with the **Delinquency Grace Period Business Rule** category that are effective on the batch business date. Note that the system considers only those effective business rules which are in the **Active** status. The system then executes the criteria of each effective business rule and considers the business rule that meet the criteria. If two or more business rules meet the criteria, the system considers the business rule with the highest priority.

The system stamps the delinquency grace period business rule against the fully insured group policy, direct billed group membership, or individual membership, respectively, in the **C1_ENT_BUS_RULE** table. The system derives the grace details for the delinquency process from the business rule. The system derives the grace period for each active policy billed to the delinquent person or account. Similarly, the system derives the grace period for each active direct billed group membership or individual membership billed to the delinquent account. Among the grace period derived for different policies or memberships, the system considers the grace period of the policy or membership with maximum grace limit and calculates the grace end date for the delinquency process using the maximum grace limit.

Note: The system considers the delinquency grace period business rules to determine the grace period only when the grace period source is set to **Algorithm** in the respective delinquency process type. If the grace period source is set to **Algorithm**, the system executes the **C1-DERGRBR** algorithm attached to the **Grace Period Derivation** system event of the delinquency process type. For more information about the algorithm, see C1-DERGRBR on page 4152.

While defining criteria for a delinquency grace period business rule, you can use parameters that are defined on the following source entities:

- Account
- Customer Class
- Delinquency Event Type
- Division
- Health Plan
- Health Product
- Membership

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- Membership Person
- Policy
- Policy Plan
- Algorithm

You can define, edit, and delete a delinquency grace period business rule through the **Business Rule** screen. While defining a delinquency grace period business rule, you need to set the category to **Delinquency Grace Period Business Rule**. The delinquency grace period business rule enables you to define the following parameter:

- **Grace Period Type** - Used to indicate whether the grace period is in days or months.
- **Grace Period** - Used to specify the number of days or months.

You can use the same criteria in multiple business rules to derive different grace details but with different effective date. You can view the delinquency grace period business rules through the **Business Rule** screen.

Delinquency Event Attributes Business Rule

Oracle Revenue Management and Billing enables you to define business rules to determine how much to wait before an event is triggered in a delinquency process. The insurance company may offer different wait period for different delinquency event types (such as, while sending letters, To Do notification, or initiating the termination request) based on certain parameters, such as health or policy plan, division, policy or membership characteristic, etc. The system will accordingly derive wait days or wait months and day of month based on the wait period (configured in the respective delinquency process type) and calculate trigger date for the delinquency event.

While executing the **C1-DPEVL** batch, the system derives the business rules with the **Delinquency Event Attributes Business Rule** category that are effective on the batch business date. Note that the system considers only those effective business rules which are in the **Active** status. The system then executes the criteria of each effective business rule and considers the business rule that meet the criteria. If two or more business rules meet the criteria, the system considers the business rule with the highest priority.

The system stamps the delinquency event attributes business rule against the fully insured group policy, direct billed group membership, or individual membership, respectively in the **C1_ENT_BUS_RULE** table. The system derives wait days or wait months and day of month based on the wait period (configured in the respective delinquency process type) from the business rule. The system derives the wait days or wait month and day of month for each active policy billed to the delinquent person or account. Similarly, the system derives the wait days or wait month and day of month for each active direct billed group membership or individual membership billed to the delinquent account. Among the wait days or wait months derived for different policies or memberships, the system considers the wait days or wait months of the policy or membership with maximum limit and calculates trigger date for the respective delinquency event using the maximum limit.

Note: The system considers the delinquency event attributes business rules to determine the wait period only when the wait period source is set to **Algorithm** in the respective delinquency process type. If the wait period source is set to **Algorithm**, the system executes the **C1-DERWDBR** algorithm attached to the **Wait Days Derivation** system event of the delinquency process type. For more information about the algorithm, see C1-DERWDBR on page 4158.

The system also derives the **Send Membership Level Notification** parameter from the business rule. The system checks whether the **Send Membership Level Notification** parameter is set to **Send Membership Level Notification Required** for at least one policy, direct billed group membership, or individual membership, respectively, billed to the delinquent entity. If so, the system sets the **Send Membership Level Notification** parameter of the delinquency event to **Send Membership Level Notification Required**. However, if the **Send Membership Level Notification** parameter is set to **Send Membership Level Notification Not Required** for all the policies, direct billed group memberships, or individual memberships, respectively, billed to the delinquent entity, the system sets the **Send Membership Level Notification** parameter of the delinquency event to **Send Membership Level Notification Not Required**.

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Note: The system considers the delinquency event attributes business rules to determine the **Send Membership Level Notification** parameter only when the send membership level notification source is set to **Algorithm** in the respective delinquency process type. If the send membership level notification source is set to **Algorithm**, the system executes the **C1-DERMLNBR** algorithm attached to the **Send Member Level Notification Option Derivation** system event of the delinquency process type. For more information about the algorithm, see C1-DERMLNBR on page 4156.

While defining criteria for a delinquency event attributes business rule, you can use the parameters that are defined on the following source entities:

- Account
- Customer Class
- Delinquency Event Type
- Division
- Health Plan
- Health Product
- Membership
- Membership Person
- Policy
- Policy Plan
- Algorithm

You can define, edit, and delete a delinquency event attributes business rule through the **Business Rule** screen. While defining a delinquency event attributes business rule, you need to set the category to **Delinquency Event Attributes Business Rule**. The delinquency event attributes business rule enables you to define the following parameters:

- **Wait Days** – Used to indicate the number of days for which you want to delay a delinquency event in a delinquency process.
- **Wait Month** – Used to indicate the number of months for which you want to delay a delinquency event in a delinquency process.
- **Wait Day of Month** – Used to indicate the day of the month when you want to trigger a delinquency event in a delinquency process.
- **Send Membership Level Notification** – Used to indicate whether you want to create a customer contact for the main subscriber of each membership billed to the delinquent customer or account.

You can use the same criteria in multiple business rules to derive different event attributes but with different effective date. You can view the delinquency event attributes business rules through the **Business Rule** screen.

Delinquency Process Type Derivation Business Rule

Oracle Revenue Management and Billing enables you to define business rules for determining the delinquency process type for an account to which an individual membership is billed. The insurance company may want to use different delinquency process type for different accounts based on certain parameters, such as health plan, division, membership effectuation status, membership termination status, and so on. The system will then accordingly derive the delinquency process type using which delinquency process should be created for the account.

While defining the delinquency process type derivation business rule criteria, you can use the parameters which are defined on the following source entities:

- Account
- Customer Class
- Delinquency Event Type
- Division
- Health Plan
- Health Product
- Membership

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- Membership Person
- Algorithm

Note: Two new source type codes named **Membership Effectuation Status** and **Terminated membership status** are introduced in this release.

You can define, edit, and delete a delinquency process type derivation business rule through the **Business Rule** screen. While defining a delinquency process type derivation business rule, you need to set its category to **Delinquency Process Type Derivation Business Rule** and specify the following details:

- **Criteria Description** – Used to indicate the business criteria that an account or its each billed individual membership must satisfy in order to derive the delinquency process type from the business rule.
- **Effective Date** – Used to specify the date from when the business rule is effective.
- **Status** – Used to indicate the status of the business rule. The valid values are **Active** and **Inactive**.
- **Delinquency Process Type** – Used to indicate the delinquency process type. The list includes only those delinquency process type which are in the **Active** status.

You can use the same criteria in the business rule to derive a different delinquency process type for a different effective date. You can view the delinquency process type derivation business rules through the **Business Rule** screen.

Delinquency Termination Date Rule Business Rule

Oracle Revenue Management and Billing enables you to define business rules for determining the termination date rule during the delinquency management. The termination date rule is used to derive the termination date for a policy or individual membership. The insurance company may derive different termination date rule for different policies or individual memberships based on certain parameters, such as division, customer class, region, and jurisdiction, in which the group or individual customer has availed for the policy plan or health plan coverage. The system will then accordingly use the termination date rule to calculate the termination date for the delinquency event type that requests to terminate the following:

- Policies billed to the delinquent person or account
- Individual memberships billed to the delinquent account

The system always derives the termination date rule through a delinquency termination date rule business rule. The system executes the **C1-DERTRBR** algorithm attached to the **Termination Date Rule Derivation** system event of the respective delinquency process type to derive the termination date rule for the delinquency event. For more information on how the termination date rule is derived, refer to the **C1-DERTRBR** algorithm description in the Delinquency Process Type Algorithms on page 4150 section.

While defining the delinquency termination date rule business rule criteria, you can use the parameters which are defined on the following entities:

The following table lists the entities on which the parameters are used while defining the delinquency termination date rule business rule criteria

Line of Business	Source Entity	Supported Source Type
Fully Insured Group Health Insurance	Account	Field and Characteristic
	Customer Class	Field
	Delinquency Event Type	Field
	Division	Field
	Policy	Field and Characteristic
	Policy Plan	Field and Characteristic
Fully Insured Individual Health Insurance	Health Plan	Field and Characteristic

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Line of Business	Source Entity	Supported Source Type
	Health Product	Field and Characteristic
	Delinquency Event Type	Field
	Membership	Field and Characteristic
	Membership Person	Field and Characteristic

Note:

If the delinquency process is created at the person level and if an attribute of a division or customer class is used in the business rule criteria, the system will check whether the division or customer class is present on the person (i.e. on the parent customer or bill group, respectively) while evaluating the business rule criteria. If so, the system will use the details of the person to evaluate the business rule criteria. However, if the division or customer class is not present on the person, the system will use the details of any account where the person is added as the main customer to evaluate the business rule criteria.

If the delinquency process is created at the account level and if an attribute of a division or customer class is used in the business rule criteria, the system will use the details of the respective account to evaluate the business rule criteria.

You can define, edit, and delete a delinquency termination date rule business rule through the **Business Rule** screen. While defining a delinquency termination date rule business rule, you need to set its category to **Delinquency Termination Date Rule Business Rule** and specify the following details:

- **Criteria Description** - Used to indicate the business criteria that a policy or individual membership must satisfy in order to derive the termination date rule from the business rule.
- **Effective Date** - Used to specify the date from when the business rule is effective.
- **Status** - Used to indicate the status of the business rule. The valid values are:
  - Active
  - Inactive
- **Termination Date Rule** - Used to indicate the termination date rule using which you want to calculate the termination date. The valid values are:
  - Latest Billed Coverage End Date
  - Latest Due Coverage End Date
  - X days After Paid Through Date
  - X Months After Paid Through Date
  - Month End of Grace Period Start
  - Month End of Termination Letter Creation
  - Month End of Termination Request Event
  - X days After Grace End Date
  - X days After Termination Request Event

Once the business rule is created, the business rule ID is generated. While creating a business rule, the status is, by default, non-editable and set to **Active**. While editing a business rule, you can change its status from **Active** to **Inactive** and vice-versa. Note that you cannot edit or delete a business rule if it is referred in the system. You can view the delinquency termination date rule business rules through the **Business Rule** screen.

For more information on how the termination date rule is used to calculate the termination date, refer to the **C1-DETTERMDT** algorithm description in the **Delinquency Event Activation** section.

Delinquency Miscellaneous Options Business Rule

Oracle Revenue Management and Billing enables you to define business rules for determining the following during the delinquency management:

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- Whether the trigger dates of delinquency events should be recalculated when the hold on the delinquency process is released
- Whether the trigger dates of delinquency events should be recalculated when the delinquency process is resumed after cancellation
- Whether you want to send an outbound message to the enrollment system for terminating the individual memberships billed to the delinquent account immediately, at the end of the month when the termination event is triggered, or after X number of days (i.e. termination wait days) from the termination event trigger date
- The number of days that you want to add to the base date while calculating the termination effective date

The insurance company may offer different delinquency arrangements to different individuals based on certain parameters, such as division, customer class, region, and jurisdiction in which the individual customer has availed for the health plan coverage. The system will then accordingly use the business rule to calculate the following:

- Trigger dates for the delinquency events
- Termination request date when you want to send the outbound message to the external system requesting to terminate the individual membership
- Termination effective date for the delinquency event type that requests to terminate the individual memberships billed to the delinquent account

The system considers the delinquency miscellaneous options business rules to determine the following:

- The value for the **Trigger Date Recalculation On Hold Release** flag when the trigger date recalculation on hold release source is set to **Algorithm** in the respective delinquency process type. If the trigger date recalculation on hold release source is set to **Algorithm**, the system executes the **C1-DERRTDBR** algorithm attached to the **Trigger Date Recalculation Option Derivation** system event of the delinquency process type when you execute the **C1-DPMON** batch. For more information on how the value is derived for the **Trigger Date Recalculation On Hold Release** flag, refer to the respective algorithm description in the Delinquency Process Type Algorithms on page 4150 section.
- The value for the **Trigger Date Recalculation On Resume** flag when the trigger date recalculation on resume source is set to **Algorithm** in the respective delinquency process type. If the trigger date recalculation on resume source is set to **Algorithm**, the system executes the **C1-DERRTDBR** algorithm attached to the **Trigger Date Recalculation Option Derivation** system event of the delinquency process type when you execute the **C1-DPMON** batch. For more information on how the value is derived for the **Trigger Date Recalculation On Resume** flag, refer to the respective algorithm description in the Delinquency Process Type Algorithms on page 4150 section.
- The value for the **Trigger Termination Process** flag and the termination wait days when the termination reinstatement configuration source is set to **Algorithm** in the respective delinquency process type. If the termination reinstatement configuration source is set to **Algorithm**, the system executes the **C1-DERTROBR** algorithm attached to the **Termination and Reinstatement Configuration Derivation** system event of the delinquency process type when you execute the **C1-DPMON** batch. For more information on how the value is derived for the **Trigger Termination Process** flag, refer to the respective algorithm description in the Delinquency Process Type Algorithms on page 4150 section.
- The number of days that you want to add to the base date while deriving the termination effective date. The system executes the **C1-DETTERMDT** algorithm attached to the **Event Activation** system event of the respective delinquency event type whenever the delinquency event is triggered manually or automatically on the trigger date.
    - Add Days to Coverage End Date
    - Add Days to Paid Through Date
    - Add Months to Paid Through Date
    - Add Days to Grace End Date
    - Add Days to Date of Processing of Termination Request

While defining the delinquency miscellaneous options business rule criteria, you can use the parameters which are defined on the following entities for individual membership:

- Delinquency Event Type
- Health Plan
- Health Product
- Membership
- Membership Person

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While defining the delinquency miscellaneous options business rule criteria, you can use the parameters which are defined on the following entities for group membership:

- Account
- Customer Class
- Delinquency Event Type
- Division
- Policy
- Policy Plan

You can define, edit, and delete a delinquency miscellaneous options business rule through the **Business Rule** screen. While defining a delinquency miscellaneous options business rule, you need to set its category to **Delinquency Miscellaneous Options Business Rule** and specify the following details:

- **Criteria Description** - Used to indicate the business criteria that an individual membership must satisfy in order to derive the required parameters from the business rule.
- **Effective Date** - Used to specify the date from when the business rule is effective.
- **Status** - Used to indicate the status of the business rule. The valid values are **Active** and **Inactive**.
- **Trigger Date Recalculation On Hold Release** - Used to indicate whether the trigger dates of delinquency events should be recalculated when the hold on the delinquency process is released. The valid values are - **Yes** and **No**.
- **Trigger Date Recalculation On Resume** - Used to indicate whether the trigger dates of delinquency events should be recalculated when the delinquency process is resumed after cancellation. The valid values are - **Yes** and **No**.
- **Trigger Termination Process** - Used to indicate when you want the system to send an outbound message to the enrollment system for terminating the individual memberships billed to the delinquent account. The valid values are:
  - **Immediate** - Used when you want the system to send an outbound message for termination on the same day when the termination event is triggered.
  - **Month End** - Used when you want the system to send an outbound message for termination at the end of the month when the termination event is triggered.
  - **After X Days** - Used when you want the system to send an outbound message for termination after X number of days from the date when the termination event is triggered.
- **Termination Wait Days** - Used to specify the number of days after which an outbound message for termination should be sent to the enrollment system. This parameter is required only when the **Trigger Termination Process** parameter in the business rule is set to **After X Days**.
- **Add Days to Coverage End Date** - Used to specify the number of days that you want to add to coverage end date in order to derive termination effective date.
- **Add Days to Paid Through Date** - Used to specify the number of days that you want to add to the paid through date (of the account) in order to derive termination effective date.
- **Add Months to Paid Through Date** - Used to specify the number of months that you want to add to the paid through month (derived from the paid through date of the account) in order to derive termination effective date.
- **Add Days to Grace End Date** - Used to specify the number of days that you want to add to grace end date in order to derive termination effective date.
- **Add Days to Date of Processing of Termination Request** - Used to specify the number of days that you want to add to termination request date in order to derive termination effective date.

Note: The **Allow Automatic Reinstatement**, **Maximum Automatic Reinstatement Count**, **Trigger Reinstatement Process**, **Reinstatement Wait Days**, **Reinstatement Threshold (%)**, **Days Since Termination**, and **Member Notification Days** parameters in the delinquency miscellaneous options business rule are not applicable for the fully insured individual business.

You can view the delinquency miscellaneous options business rules through the **Business Rule** screen.

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Business Rule Type

The **Business Rule Type** screen allows you to search for a business rule type using various search criteria. It also allows you to define, edit and delete a business rule type. It contains the following zone:

- Search Business Rule Type on page 3699
- Business Rule Type on page 3702

Search Business Rule Type

The **Search Business Rule Type** zone allows you to search for a business rule type using various search criteria. It contains the following two sections:

- **Search Criteria** - The **Search Criteria** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Business Rule Type	Used to search a particular business rule type.	No
Priority	Used to search a business rule type based on the priority. **Note:** If you set the priority to a lowest number, the system crawls from the lowest number to the highest, whenever you perform a search for a business rule type. For example, a business rule type with the priority 10 will be searched before a business rule type with the priority 20.	No
Description	Used to search a business rule type having a particular description.	No
Criteria Sequence	Used to search a business rule type where the business rule criteria has a specific order of execution. **Note:** This field appears when you click the **Advanced Search** link.	No
Criteria Description	Used to search a business rule type where the business rule criteria has a specific description. **Note:** This field appears when you click the **Advanced Search** link.	No
Parameter 1	Used to search a business rule type with a parameter code. **Note:** This field appears when you click the **Advanced Search** link. You can specify the parameter code where the parameter usage is set to **Business Rule Eligibility Criteria**. You must not specify the ampersand (&) character in this field. The **Search** (🔍) icon appears corresponding to this field. On clicking the **Search** icon, the **Parameter Search** window appears.	No

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Field Name	Field Description	Mandatory (Yes or No)
Parameter 1 Value	Used to search a business rule type with a parameter value.	Yes (Conditional) **Note:** This field is required if **Parameter 1** is specified.
Parameter 2	Used to search a business rule type with a parameter code. **Note:** This field appears when you click the **Advanced Search** link. You can specify the parameter code where the parameter usage is set to **Business Rule Eligibility Criteria**. You must not specify the ampersand (&) character in this field. The **Search** (🔍) icon appears corresponding to this field. On clicking the **Search** icon, the **Parameter Search** window appears.	No
Parameter 2 Value	Used to search a business rule type with a parameter value.	Yes (Conditional) **Note:** This field is required if **Parameter 2** is specified.
Parameter 3	Used to search a business rule type with a parameter code. **Note:** This field appears when you click the **Advanced Search** link. You can specify the parameter code where the parameter usage is set to **Business Rule Eligibility Criteria**. You must not specify the ampersand (&) character in this field. The **Search** (🔍) icon appears corresponding to this field. On clicking the **Search** icon, the **Parameter Search** window appears.	No
Parameter 3 Value	Used to search a business rule type with a parameter value.	Yes (Conditional) **Note:** This field is required if **Parameter 3** is specified.
Parameter 4	Used to search a business rule type with a parameter code.	No

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Field Name	Field Description	Mandatory (Yes or No)
	Note: This field appears when you click the **Advanced Search** link. You can specify the parameter code where the parameter usage is set to **Business Rule Eligibility Criteria**. You must not specify the ampersand (&) character in this field. The **Search** (🔍) icon appears corresponding to this field. On clicking the **Search** icon, the **Parameter Search** window appears.	
Parameter 4 Value	Used to search a business rule type with a parameter value.	Yes (Conditional) **Note:** This field is required if **Parameter 4** is specified.

Note: While searching for the business rule type, always ensure that you provide the parameter and the parameter value in a sequential order.

- **Search Results** - On clicking the **Search** button, the search results appear based on the specified search criteria. The **Search Results** section contains the following columns:

Column Name	Column Description
Business Rule Type	Displays the business rule type which is associated with the parameters of the usage type **Business Rule Eligibility Criteria**.
Description	Displays the description of the business rule type.
Priority	Displays the priority of the business rule type.
Parameters	Indicates the parameters which are associated with the business rule type.
Edit	On clicking the **Edit** (✎) icon, the **Business Rule Type** screen appears where you can edit the business rule type details.
Delete	On clicking the **Delete** (🗑) icon, you can delete the business rule type.

Note:

Pagination is used to display limited number of records in the **Search Results** section. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

By default, the **Filter** area is visible. You can hide the **Filter** area by clicking the **Filters** (⧩) icon in the upper right corner of this zone.

On clicking the **Broadcast** (📡) icon corresponding to a business rule type, the **Business Rule Type** zone appears where you can view the details of the respective business rule type.

Related Topics

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For more information on...	See...
Business Rule Type screen	Business Rule Type on page 3699
How to edit a business rule type	Editing a Business Rule Type on page 3707
How to delete a business rule type	Deleting a Business Rule Type on page 3708

Business Rule Type

The **Business Rule Type** zone displays the details of the business rule type. It contains the following sections:

- **Main** - Displays basic information about the business rule type. It contains the following fields:

Field Name	Field Description
Business Rule Type	Displays the business rule type.
Priority	Displays the priority of the business rule type.
Description	Displays the description of the business rule type.

- **Parameters** - The parameters section lists the parameters associated with the business rule type where the parameter usage is set to **Business Rule Eligibility Criteria**. It contains the following columns:

Column Name	Column Description
Sequence	Indicates the order in which the business rule criteria should be executed in the business rule.
Parameter	Indicates the parameter which is associated with the business rule type.

- **Characteristics** - The characteristics section lists the characteristics defined for the business rule type. It contains the following columns:

Column Name	Column Description
Characteristic Type	Indicates the characteristic type.
Characteristic Value	Displays the value of the characteristic type.

- **Record Actions** - This section contains the following buttons:

Button Name	Button Description
Edit	Used to edit the details of the business rule type.
Delete	Used to delete the business rule type.

- **Record Information** - This section contains the following field:

Field Name	Field Description
Business Object	Indicates the business object using which the business rule type is created. In addition, a context menu appears corresponding to this field which helps in navigating to other screens in the application. **Note:** It has a link. On clicking the link, the **Business Object** screen appears where you can view the details of the respective business object.

Note: By default, the **Business Rule Type** zone does not appear in the **Business Rule Type** screen. It appears when you click the **Broadcast** (📡) icon corresponding to a business rule type in the **Search Business Rule Type** zone.

Related Topics

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For more information on...	See...
How to edit a business rule type	Editing a Business Rule Type on page 3707
How to delete a business rule type	Deleting a Business Rule Type on page 3708
How to view the details of a business rule type	Viewing the Business Rule Type Details on page 3704

Business Rule Criteria

The **Business Rule Criteria** zone displays the criteria details of the business rule. It contains the following columns:

Column Name	Column Description
Criteria Sequence	Displays the order in which the criteria is executed in the business rule.
Criteria Description	Displays the description of the criteria.
Criteria	Displays the details of the criteria.
Edit	On clicking the **Edit** ( ) icon, the **Business Rule Criteria** screen appears where you can edit the business rule criteria details.
Delete	On clicking the **Delete** ( ) icon, you can delete the business rule criteria.

Note:

By default, the **Business Rule Criteria** zone does not appear in the **Business Rule Type** screen. It appears when you click the **Broadcast** ( ) icon corresponding to a business rule type in the **Search Business Rule Type** zone.

You can either edit or delete all the business criterias by clicking the **Select All** check box available in the first column of the table in the **Business Rule Criteria** zone.

You can also add a new business criteria by clicking the **Add** link in the upper right corner of the **Business Rule Criteria** zone.

Related Topics

For more information on...	See...
How to edit the business rule criteria of a business rule type	Editing the Business Rule Criteria of a Business Rule Type on page 3710

Searching for a Business Rule Type

Prerequisites

To search for a business rule type, you should have:

- Parameters defined in the application where the parameter usage is set to **Business Rule Eligibility Criteria**

Procedure

To search for a business rule type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, click **B** and then click **Business Rule Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Business Rule Type** sub-menu.
   The **Business Rule Type** screen appears.

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4. Enter the search criteria in the **Search Business Rule Type** zone.

> **Note:** ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.

5. Click **Search**.
   A list of business rule types that meet the search criteria appears in the **Search Results** section.

> **Note:** Pagination is used to display limited number of records in the **Search Results** section. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

Related Topics

For more information on...	See...
Search Business Rule Type zone	Search Business Rule Type on page 3699
Business Rule Type screen	Business Rule Type on page 3699
Business Rule Criteria screen	Business Rule Criteria on page 3703

Viewing the Business Rule Type Details

Procedure

To view the business rule type details:

1. Search for the business rule type in the **Business Rule Type** screen.
2. In the **Search Results** section, click the **Broadcast** (📡) icon corresponding *t*o the business rule type whose details you want to view:
   The **Business Rule Type** zone appears.
3. View the details of the business rule type in the **Business Rule Type** zone.

Related Topics

For more information on...	See...
Business Rule Type screen	Business Rule Type on page 3699
Search Business Rule Type zone	Search Business Rule Type on page 3699
Business Rule Type zone	Business Rule Type on page 3702

Defining a Business Rule Type

Prerequisites

To define a business rule type you should have:

- Parameters defined in the application (where the **Business Rule Eligibility Criteria** option is selected in the **Parameter Usage** section)
- Characteristic types defined in the application (where the characteristic entity is set to **Business Rule Type**).

Procedure

To define a business rule type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **B** and then click **Business Rule Type**.

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A sub-menu appears.

3. Click the **Add** option from the **Business Rule Type** sub-menu.

   The **Business Rule Type** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details about the business rule type.
   - **Parameters** - Used to associate the parameters with the business rule type.
   - **Characteristics** - Used to define the characteristics for the business rule type.

   The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Business Rule Type	Used to specify the business rule type.	Yes
Priority	Used to specify the priority for the business rule type. **Note:** If you set the priority to a lowest number, the system crawls from the lowest number to the highest, whenever you perform a search for a business rule type. For example, a business rule type with the priority 10 will be searched before a business rule type with the priority 20. The priority cannot be less than or equal to zero.	Yes
Description	Used to specify the description for the business rule type.	Yes

Tip: Alternatively, you can access the **Business Rule Type** screen by clicking the **Add** button in the **Page Title** area of the **Business Rule Type** screen.

4. Enter the required details in the **Main** section.
5. Associate the parameters with the business rule type, if required.
6. Define the characteristics for the business rule type, if required.
7. Click **Save**.
   The business rule type is defined.

Related Topics

For more information on...	See...
Business Rule Type screen	Business Rule Type on page 3699
How to associate parameters with the business rule type	Associating a Parameter with a Business Rule Type on page 3705
How to define a characteristic for the business rule type	Defining a Characteristic for a Business Rule Type on page 3706

Associating a Parameter with a Business Rule Type

Prerequisites

To associate a parameter with a business rule type, you should have:

- Parameters defined in the application (where the **Business Rule Eligibility Criteria** option is selected in the **Parameter Usage** section)

Procedure

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To associate a parameter with a business rule type:

1. Ensure that the **Parameters** section is expanded when you are defining, editing, or copying a business rule type.

   The **Parameters** section contains the following fields in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Sequence	Used to specify the sequence number for the parameter.	Yes (Conditional)
	Note: The sequence cannot be less than or equal to zero.	**Note:** This data is required while associating the parameters with the business rule type.
Parameter	Used to indicate the parameter which you want to associate with the business rule type.	Yes (Conditional)
	Note: The **Search** (🔍) icon appears corresponding to the **Parameter** field. On clicking the **Search** icon, the **Parameter Search** window appears. On specifying the value for a parameter, the description of the parameter appears corresponding to the **Parameter** field.	**Note:** This data is required while associating the parameters with the business rule type.

2. Enter the required details in the **Parameters** section.
3. If you want to associate more than one parameter with the business rule type, click the **Add** (+) icon and *t*hen repeat step 2.

> **Note:** However, if you want to disassociate a parameter from the business rule type, click the **Delete** (🗑) icon corresponding to the parameter.

4. Click **Save**.
   The parameter is associated with the business rule type.

Related Topics

For more information on...	See...
How to define a business rule type	Defining a Business Rule Type on page 3704
How to edit a business rule type	Editing a Business Rule Type on page 3707

Defining a Characteristic for a Business Rule Type

Prerequisites

To define a characteristic for a business rule type, you should have:

- Characteristic types defined in the application (where the characteristic entity is set to **Business Rule Definition**)

Procedure

To define a characteristic for a business rule type:

1. Ensure that the **Characteristics** section is expanded when you are defining, editing, or copying a business rule type.

   The **Characteristics** section contains the following fields in a grid:

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Field Name	Field Description	Mandatory (Yes or No)
Characteristic Type	Used to indicate the characteristic type. **Note:** The list includes only those characteristic types where the characteristic entity is set to **Business Rule Definition**.	No
Characteristic Value	Used to specify the value for the characteristic type. **Note:** On specifying the value for a predefined characteristic type, the description of the characteristic value appears corresponding to the **Characteristic Value** field.	No

2. Enter the required details in the **Characteristics** section.
3. If you want to define more than one characteristic for the business rule type, click the **Add** (+) icon and *t*hen repeat step 2.

Note: However, if you want to remove a characteristic from the business rule type, click the **Delete** (🗑) icon corresponding to the characteristic.

4. Click **Save**.
   The characteristic is defined for the business rule type.

Related Topics

For more information on...	See...
How to define a business rule type	Defining a Business Rule Type on page 3704
How to edit a business rule type	Editing a Business Rule Type on page 3707

Editing a Business Rule Type

Prerequisites

To edit a business rule type you should have:

- Parameters defined in the application (where the **Business Rule Eligibility Criteria** option is selected in the **Parameter Usage** section)
- Characteristic types defined in the application (where the characteristic entity is set to **Business Rule Type**).

Procedure

To edit a business rule type:

1. Search for the business rule type in the **Business Rule Type** screen.
2. In the **Search Results** section, click the **Edit** (✎) icon in the **Edit** column corresponding to the business rule type whose *d*etails you want to edit.

   The **Business Rule Type** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details about the business rule type.
   - **Parameters** - Used to associate the parameters with the business rule type.
   - **Characteristics** - Used to define the characteristics for the business rule type

   The **Main** section contains the following fields:

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Field Name	Field Description	Mandatory (Yes or No)
Business Rule Type	Displays the business rule type.	Not applicable
Priority	Used to specify the priority for the business rule type. **Note:** If you set the priority to a lowest number, the system crawls from the lowest number to the highest, whenever you perform a search for a business rule type. For example, a business rule type with the priority 10 will be searched before a business rule type with the priority 20. The priority cannot be less than or equal to zero.	Yes
Description	Used to specify the description for the business rule type.	Yes

3. Modify the required details in the **Main** section.
4. Associate or disassociate parameters from the business rule type, if required.
5. Define, edit, or remove characteristics of the business rule type, if required.
6. Click **Save**.
   The changes made to the business rule type are saved.

Tip: Alternatively, you can edit the details of a business rule type by clicking the **Edit** button in the **Business Rule Type** zone.

Related Topics

For more information on...	See...
Business Rule Type screen	Business Rule Type on page 3699
Business Rule Type zone	Business Rule Type on page 3702
How to associate parameters with the business rule type	Associating a Parameter with a Business Rule Type on page 3705
How to define a characteristic for the business rule type	Defining a Characteristic for a Business Rule Type on page 3706

Deleting a Business Rule Type

Procedure

To delete a business rule type:

1. Search for the business rule type in the **Business Rule Type** screen.
2. In the **Search Results** section, click the **Delete** (🗑) icon in the **Delete** column corresponding to the business rule type that you want to delete.
   A message appears confirming whether you want to delete the business rule type.

Note: You can delete a business rule type when a deal is not created using the business rule type.

Tip: Alternatively, you can delete a business rule type by clicking the **Delete** button in the **Business Rule Type** zone.

3. Click **OK**.
   The business rule type is deleted.

Related Topics

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For more information on...	See...
Business Rule Type screen	Business Rule Type on page 3699
Business Rule Type zone	Business Rule Type on page 3702

Defining a Business Rule Criteria for a Business Rule Type

Procedure

To define a business rule criteria for a business rule type, you should have:

- Business rule type defined in the application.
- Parameters defined in the application where the parameter usage is set to **Business Rule Eligibility Criteria**.

Procedure

To define a business rule criteria for a business rule type:

1. Search for the business rule type in the **Business Rule Type** screen.
2. In the **Search Results** section, click the **Broadcast** (ᯤ) icon corresponding to the business rule type whose *b*usiness rule criteria details you want to edit.

   The following zones appear:

   - Business Rule Type on page 3702
   - Business Rule Criteria on page 3703
3. In the **Business Rule Criteria** zone, click the **Add** link in the upper-right corner of this zone.
   The **Business Rule Criteria** screen appears. It contains the following columns:

Column Name	Column Description
Business Rule Type	Displays the business rule type for which you want to define the criteria.
Description	Displays the description of the business rule type.

In addition to these columns, this screen contains additional fields:

Field Name	Field Description
Criteria Sequence	Used to specify the order in which the criteria is executed in the business rule.
Criteria Description	Used to specify the description of the criteria.
Criteria	In addition, this column contains some more additional fields:

Field Name	Field Description
Parameter	Displays the parameter code associated with the criteria. **Note:** This is a read-only field.
Parameter Value	Used to indicate the value of the parameter code.

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Field Name	Field Description
	Field Name / **Field Description** **Note:** This is a read-only field. The **Search** (🔍) icon appears corresponding to this field. On clicking the **Search** icon, the **Parameter Search** window appears. On specifying the parameter, the description of the parameter appears corresponding to the **Parameter Value** field.

4. Enter the required business rule criteria details.
5. If you want to add more than one criteria to the business rule type, click the **Add** (+) icon and *t*hen repeat step 2.

Note: However, if you want to remove a criteria from the business rule type, click the **Delete** (🗑) icon corresponding to the criteria sequence field.

6. Click **Save**.
   The business rule criteria is defined for the business rule type.

Related Topics

For more information on...	See...
Business Rule Type screen	Business Rule Type on page 3699

Editing the Business Rule Criteria of a Business Rule Type

Procedure

To edit the business rule criteria of a business rule type:

1. Search for the business rule type in the **Business Rule Type** screen.
2. In the **Search Results** section, click the **Broadcast** (📡) icon corresponding to the business rule type whose *b*usiness rule criteria details you want to edit.

   The following zones appear:

   - Business Rule Type on page 3702
   - Business Rule Criteria on page 3703
3. In the **Business Rule Criteria** zone, click the check box corresponding to the **Criteria Sequence** column whose business rule criteria details you want to edit and click the **Edit** button available above the table in this zone.
   The **Business Rule Criteria** screen appears.

Note: You can also edit all the business criterias by clicking the **Select All** check box available in the first column of the table

The **Business Rule Criteria** screen contains the following columns:

Column Name	Column Description
Business Rule Type	Displays the business rule type.
Description	Displays the description of the business rule type.

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In addition to these columns, this screen contains additional fields:

Field Name	Field Description
Criteria Sequence	Displays the order in which the criteria is executed in the business rule. **Note:** This is a read-only field.
Criteria Description	Used to specify the description of the criteria.
Criteria	In addition, this column contains some more additional fields: **Field Name** / **Field Description** Parameter / Displays the parameter code associated with the criteria. **Note:** This is a read-only field. Parameter Value / Indicates the value of the parameter code. **Note:** This is a read-only field.

4. Modify the criteria description.

Note: You can only modify the criteria description.

5. Click **Save**.
The changes made to the business rule criteria are saved.

Related Topics

For more information on...	See...
Business Rule Type screen	Business Rule Type on page 3699

Deleting the Business Rule Criteria of a Business Rule Type

Procedure

To delete the business rule criteria of a business rule type:

1. Search for the business rule type in the **Business Rule Type** screen.
2. In the **Search Results** section, click the **Broadcast** (ᯤ) icon corresponding *t*o the business rule type whose criteria details you want to view.
The following zones appear:
   - **Business Rule Type**
   - **Business Rule Criteria**
3. In the **Business Rule Criteria** zone, click the check box corresponding to the **Criteria Sequence** column whose business rule criteria details you want to delete and click the **Delete** button available above the table in this zone.
A message appears confirming whether you want to delete the business rule criteria.
4. Click **OK**.
The business rule criteria is deleted.

Related Topics

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For more information on...	See...
Business Rule Type screen	Business Rule Type on page 3699
Search Business Rule Type zone	Search Business Rule Type on page 3699
Business Rule Type zone	Business Rule Type on page 3702
Business Rule Criteria zone	Business Rule Criteria on page 3703

Business Rule (Used for Searching)

The **Business Rule** screen allows you to search for a business rule using various search criteria. It also allows you to define, edit, and delete a business rule. It contains the following zones:

- Search Business Rule on page 3712
- Business Rule Log on page 3719

Search Business Rule

The **Search Business Rule** zone allows you to search for a business rule using various search criteria. It contains the following two sections:

- **Search Criteria** - The **Search Criteria** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Search By	Used to indicate whether you want to search for a business rule using the business rule category. The valid values are: • Binder Payment Rules • Fully-Insured Pricing Rules • New Born Rules • Rate Guarantee Rules • Refund/Write Off Business Rules • Delinquency Grace Period Business Rules • Delinquency Event Attributes Business Rules • Delinquency Termination Date Business Rules • Delinquency Miscellaneous Options Business Rules **Note:** By default, the **Fully-Insured Pricing Rules** option is selected.	No
Business Rule ID	Used to search a particular business rule.	No
Business Rule Type Description	Used to search a business rule with a particular business rule type description.	No
Effective Date	Used to search business rule which is effective from a particular date.	No
Criteria Description	Used to search a business rule with a particular business rule criteria description.	No
Status	Used to search business rules with a particular status. The valid values are: • Active • Inactive	No

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Field Name	Field Description	Mandatory (Yes or No)
Parameter 1	Used to search a business rule based on a particular parameter code. **Note:** You can specify the parameter code where the parameter usage is set to **Business Rule Eligibility Criteria**. You must not specify the ampersand (&) character in this field. The **Search** (🔍) icon appears corresponding to this field. On clicking the **Search** icon, the **Parameter Search** window appears.	No
Parameter 1 Value	Used to search a business rule based on a particular parameter value.	Yes (Conditional) **Note:** This field is required if **Parameter 1** is specified.
Parameter 2	Used to search a business rule based on a particular parameter code. **Note:** You can specify the parameter code where the parameter usage is set to **Business Rule Eligibility Criteria**. You must not specify the ampersand (&) character in this field. The **Search** (🔍) icon appears corresponding to this field. On clicking the **Search** icon, the **Parameter Search** window appears.	No
Parameter 2 Value	Used to search a business rule based on a particular parameter value.	Yes (Conditional) **Note:** This field is required if **Parameter 2** is specified.
Parameter 3	Used to search a business rule based on a particular parameter code. **Note:** You can specify the parameter code where the parameter usage is set to **Business Rule Eligibility Criteria**. You must not specify the ampersand (&) character in this field. The **Search** (🔍) icon appears corresponding to this field. On clicking the **Search** icon, the **Parameter Search** window appears.	No

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Field Name	Field Description	Mandatory (Yes or No)
Parameter 3 Value	Used to search a business rule based on a particular parameter value.	Yes (Conditional) **Note:** This field is required if **Parameter 3** is specified.
Parameter 4	Used to search a business rule based on a particular parameter code. **Note:** You can specify the parameter code where the parameter usage is set to **Business Rule Eligibility Criteria**. You must not specify the ampersand (&) character in this field. The **Search** (🔍) icon appears corresponding to this field. On clicking the **Search** icon, the **Parameter Search** window appears.	No
Parameter 4 Value	Used to search a business rule based on a particular parameter value.	Yes (Conditional) **Note:** This field is required if **Parameter 4** is specified.

Note: While searching for the business rule, always ensure that you provide the parameter and the parameter value in a sequential order.

- **Search Results** - On clicking the **Search** button, the search results appear based on the specified search criteria. The **Search Results** section contains the following columns:

Column Name	Column Description
Criteria Description	Displays the description of the criteria which is associated with the business rule.
Eligibility Criteria	Displays the eligibility criteria for the business rule.
Priority	Displays the sequence in which the business rule criteria must be executed in the business rule.
Effective Date	Displays the date from when the business rule is effective.
Status	Indicates the status of the business rule. The valid values are: • Active • Inactive
Grace Period Days	Displays the number of days which are used to define the grace period end date for the delinquency process. **Note:** This column appears when the **Delinquency Grace Period Business Rule** option is selected from the **Search By** list.
Wait Days	Displays the wait period (in days) after which the delinquency event is triggered.

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Column Name	Column Description
	Note: This column appears when the **Delinquency Events Attribute Business Rule** option is selected from the **Search By** list.
Wait Month	Displays the wait period (in months) after which the delinquency event is triggered.
	Note: This column appears when the **Delinquency Events Attribute Business Rule** option is selected from the **Search By** list.
Wait Day Of Month	Indicates the particular day of the month after which the delinquency event is triggered.
	Note: This column appears when the **Delinquency Events Attribute Business Rule** option is selected from the **Search By** list.
Send Membership Level Notification	Indicates whether you want to send membership level notification when the customer contacts are created as part of the events in the delinquency process, created using the delinquency process type. The valid values are: • Send Membership Level Notification Required • Send Membership Level Notification Not Required
	Note: This column appears when the **Delinquency Events Attribute Business Rule** option is selected from the **Search By** list. This field is not applicable in the case of **Individual Delinquency**.
Termination Date Rule	Indicates the termination date rule used for calculating the termination effective date.
	Note: This column appears when the **Delinquency Termination Date Business Rule** option is selected from the **Search By** list.
Trigger Date Recalculation On Hold Release	Indicates whether you want to recalculate the trigger date once the hold request is released. The valid values are: • Yes • No
	Note: This column appears when the **Delinquency Miscellaneous Options Business Rule** option is selected from the **Search By** list.
Trigger Date Recalculation On Resume	Indicates whether you want to recalculate the trigger date once the hold request is resumed. The valid values are: • Yes • No
	Note: This column appears when the **Delinquency Miscellaneous Options Business Rule** option is selected from the **Search By** list.
Trigger Termination Process	Indicates an option based on which the termination process is triggered. The valid values are: • After X Days

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Column Name	Column Description
	• Immediate • Month End
	Note: This column appears when the **Delinquency Miscellaneous Options Business Rule** option is selected from the **Search By** list.
Termination Wait Days	Displays the wait period (in days) after which the termination process is triggered.
	Note: The system sets the termination wait days to zero, if you do not specify a value while defining or editing a delinquency process type. This column appears when the **Delinquency Miscellaneous Options Business Rule** option is selected from the **Search By** list.
Allow Automatic Reinstatement	Indicates whether you want to allow automatic reinstatement of the individual membership. The valid values are: • Yes • No
	Note: This column appears when the **Delinquency Miscellaneous Options Business Rule** option is selected from the **Search By** list. This field is not applicable for **Individual Delinquency**.
Maximum Automatic Reinstatement Count	Displays the maximum number of time the system allows automatic reinstatement.
	Note: This column appears when the **Delinquency Miscellaneous Options Business Rule** option is selected from the **Search By** list. This field is not applicable for **Individual Delinquency**.
Trigger Reinstatement Process	Indicates an option based on which the reinstatement process must be triggered. The valid values are: • After X Days • Immediate • Month End
	Note: This column appears when the **Delinquency Miscellaneous Options Business Rule** option is selected from the **Search By** list. This field is not applicable for **Individual Delinquency**.
Reinstatement Wait Days	Displays the wait period (in days) after which the reinstatement process is triggered.

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Column Name	Column Description
	Note: This column appears when the **Delinquency Miscellaneous Options Business Rule** option is selected from the **Search By** list. This field is not applicable for **Individual Delinquency**.
Reinstatement Threshold (%)	Displays the percentage value based on which the automatic reinstatement takes place.
	Note: This column appears when the **Delinquency Miscellaneous Options Business Rule** option is selected from the **Search By** list. This field is not applicable for **Individual Delinquency**.
Days Since Termination	Displays the number of days since the termination effective date for automatic reinstatement to take place.
	Note: This column appears when the **Delinquency Miscellaneous Options Business Rule** option is selected from the **Search By** list. This field is not applicable for **Individual Delinquency**.
Member Notification Days	Displays the number of days after which the member receives notification.
	Note: This column appears when the **Delinquency Miscellaneous Options Business Rule** option is selected from the **Search By** list. This field is not applicable for **Individual Delinquency**.
Add Days to Date of Processing of Termination Request	Displays the number of days that you want to add to termination request date in order to derive termination effective date.
	Note: This column appears when the **Delinquency Miscellaneous Options Business Rule** option is selected from the **Search By** list.
Add Days to Grace End Date	Displays the number of days that you want to add to grace end date in order to derive termination effective date.
	Note: This column appears when the **Delinquency Miscellaneous Options Business Rule** option is selected from the **Search By** list.
Add Days to Coverage End Date	Displays the number of days that you want to add to coverage end date in order to derive termination effective date.
	Note: This column appears when the **Delinquency Miscellaneous Options Business Rule** option is selected from the **Search By** list.

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Column Name	Column Description
Add Days to Paid Through Date	Displays the number of days that you want to add to the paid through date (of the account) in order to derive termination effective date. **Note:** This column appears when the **Delinquency Miscellaneous Options Business Rule** option is selected from the **Search By** list.
Add Months to Paid Through Date	Displays the number of months that you want to add to the paid through month (derived from the paid through date of the account) in order to derive termination effective date. **Note:** This column appears when the **Delinquency Miscellaneous Options Business Rule** option is selected from the **Search By** list.
Maximum Dependents	Indicates the maximum number of dependent persons which are eligible for premium calculation.
Dependant Max Age Limit	Indicates the maximum age limit for children which are eligible for premium calculation.
Dependant Order Priority	Indicates the order in which the system should first consider youngest or eldest children during premium calculation. The valid values are - **YOUNGEST** and **ELDEST**.
Age Calculation Date	Indicates whether you want to calculate the member person's age using the member person's enrollment date or policy's start or renewal date.
Age Recalculation Date	Indicates whether you want to recalculate the member person's age using the member person's age changes or next month or policy renewal date.
Young Adult Applicability	Indicates whether you want to consider the young adults during the premium calculation. The system supports the following two characteristic values - **Y** and **N**.
Young Adult Max Age Limit	Indicates the maximum age limit for young adults which are eligible for premium calculation.
Member Relationship Derivation Date	Indicates whether you want to derive the member relationship for a member person using its date of birth or enrollment date. The system supports the following two characteristic values - Date of Birth and Enrollment Date.
Business Rule ID	Displays the business rule ID.

Note: Pagination is used to display limited number of records in the **Search Results** section. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

By default, the **Filter** area is visible. You can hide the **Filter** area by clicking the **Filters** (⧩) icon in the upper right corner of this zone.

On clicking the **Broadcast** (📡) icon corresponding to a business rule, the **Business Rule** zone appears where you can view the details of the respective business rule.

Related Topics

For more information on...	See...
Business Rule screen	Business Rule (Used for Searching) on page 3712
How to search a business rule	Searching for a Business Rule on page 3719

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Business Rule Log

The **Business Rule Log** zone lists the complete trail of actions performed on the business rule. It contains the following columns:

Column Name	Column Description
Creation Date Time	Displays the date and time when the action was performed on the business rule.
Details	Displays the details of the action performed on the business rule.
User	Indicates the user who has performed the action on the business rule.

Related Topics

For more information on...	See...
How to view the log of a business rule	Viewing the Log of a Business Rule on page 3753

Searching for a Business Rule

Prerequisites

To search for a business rule, you should have:

- Business rule criteria defined in the application
- Business rule types associated with the business rule
- Parameters associated with the business rule types and their corresponding vales defined in the application
- Business rules defined in the application

Procedure

To search for a business rule:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, click **B** and then click **Business Rule**.
   A sub-menu appears.
3. Click the **Search** option from the **Business Rule** sub-menu.
   The **Business Rule** screen appears.
4. Enter the search criteria in the **Search Business Rule** zone.

> **Note:** ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.

5. Click **Search**.
   A list of business rules that meet the search criteria appears in the **Search Results** section.

> **Note:** Pagination is used to display limited number of records in the **Search Results** section. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

Related Topics

For more information on...	See...
Business Rule screen	Business Rule (Used for Searching) on page 3712

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For more information on...	See...
Search Business Rule zone	Search Business Rule on page 3712

Defining a Binder Payment Business Rule

To define a binder payment business rule, you should have:

- Business rule type defined in the application
- Binder payment business rule category defined in the application
- Values defined for the **BUS_RULE_CAT_FLG** lookup field
- Status defined for the binder payment business rule in the application

Procedure

To define a binder payment business rule:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **B** and then click **Business Rule**.
   A sub-menu appears.
3. Click the **Add** option from the **Business Rule** sub-menu.

   The **Select Business Category** screen appears. It contains the following field:

Field Name	Field Description	Mandatory (Yes or No)
Business Rule Category	Used to indicate the business rule category using which you want to create a business rule. The valid values are: • Binder Payment Business Rule • Fully-Insured Pricing Business Rule • New Born Business Rule • Rate Guarantee Business Rule	Yes

Note: Alternatively, you can access the **Business Rule Category** screen by clicking the **Add** button in the **Page Title** area of the **Business Rule** screen.

4. Select the **Binder Payment Business Rule** option from the **Business Rule Category** list.
5. Click **OK**.
   The **Binder Payment Business Rule** screen appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Criteria Description	Used to indicate the business criteria for the binder payment business rule. **Note:** The **Search** (🔍) icon appears corresponding to the **Criteria Description** field. On clicking the **Search** icon, the **Business Rule Criteria Search** window appears.	Yes
Effective Date	Used to specify the date from when the binder payment business rule is effective.	Yes
Status	Used to indicate the status of the binder payment business rule. The valid values are: • Active	Not applicable

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Field Name	Field Description	Mandatory (Yes or No)
	• Inactive **Note:** It is a read-only field. By default, the **Active** option is selected.	
Binder Payment Applicability	Used to indicate that you want the system to monitor whether the binder payment is received or not before activating the individual membership.	No
Threshold Percentage	Used to specify the threshold percentage using which the threshold amount should be calculated. **Note:** This field is enabled only when the **Binder Payment Applicability** check box is selected.	No
Grace Days	Used to calculate the grace date for the individual membership. **Note:** The grace days cannot be less than or equal to zero. This field is enabled only when the **Binder Payment Applicability** check box is selected.	Yes (Conditional) **Note:** This field is required if the **Binder Payment Applicability** check box is selected.
Hold Billing	Used to indicate whether you want to hold the bill generation process for the individual membership until the binder payment is received. **Note:** This field is enabled only when the **Binder Payment Applicability** check box is selected.	No

6. Enter the required details in the **Binder Payment Business Rule** screen.
7. If you want to define more than one binder payment business rule, click the **Add** (+) icon and then repeat step 6.

Note: However, if you want to remove a binder payment business rule, click the **Delete** (🗑) icon corresponding to the **Criteria Description** field.

8. Click **Save**.
   The binder payment business rule is defined.

Related Topics

For more information on...	See...
Business Rule screen	Business Rule (Used for Searching) on page 3712

Defining a Fully-Insured Pricing Business Rule

To define a fully-insured pricing business rule, you should have:

- Business rule type defined in the application
- Fully-Insured pricing business rule category defined in the application

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- Values defined in the following lookup fields:
  - **BUS_RULE_CAT_FLG** lookup field
  - **DEP_ORDER_PRIORITY_FLG** lookup field
  - **AGE_CAL_DT_BASED_ON_FLG** lookup field
  - **AGE_RECAL_DT_BASED_ON_FLG** lookup field
  - **MEM_ROLE_DERV_DT_BASED_ON_FLG** lookup field
- Status defined for the fully-insured pricing business rule in the application

Procedure

To define a fully-insured pricing business rule:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **B** and then click **Business Rule**.
   A sub-menu appears.
3. Click the **Add** option from the **Business Rule** sub-menu.

   The **Select Business Category** screen appears. It contains the following field:

Field Name	Field Description	Mandatory (Yes or No)
Business Rule Category	Used to indicate the business rule category using which you want to create a business rule. The valid values are: • Binder Payment Business Rule • Fully-Insured Pricing Business Rule • New Born Business Rule • Rate Guarantee Business Rule	Yes

Note: Alternatively, you can access the **Business Rule Category** screen by clicking the **Add** button in the **Page Title** area of the **Business Rule** screen.

4. Select the **Fully-Insured Pricing Business Rule** option from the **Business Rule Category** list.
5. Click **OK**.
   The **Fully-Insured Pricing Business Rule** screen appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Criteria Description	Used to indicate the business criteria for the fully-insured pricing business rule. **Note:** The **Search** (🔍) icon appears corresponding to the **Criteria Description** field. On clicking the **Search** icon, the **Business Rule Criteria Search** window appears.	Yes
Effective Date	Used to specify the date from when the fully-insured pricing business rule is effective.	Yes
Status	Used to indicate the status of the fully-insured pricing business rule. **Note:** It is a read-only field. By default, the **Active** option is selected.	Not applicable

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Field Name	Field Description	Mandatory (Yes or No)
Maximum Dependents	Used to specify the maximum number of children which are eligible for premium calculation. **Note:** The value for this field must either be zero (0) or a positive integer.	No
Dependent Max Age Limit	Used to specify the maximum age limit for children eligible for premium calculation. **Note:** The value for this field must either be zero (0) or a positive integer.	Yes (Conditional) **Note:** This field is required when you have specified zero (0) in the **Maximum Dependents** field while defining a fully-insured pricing business rule.
Dependent Order Priority	Used to indicate the order priority of the dependent during premium calculation. The valid values are: • Eldest • Youngest	Yes (Conditional) **Note:** This field is required when you have specified zero (0) in the **Maximum Dependents** field while defining a fully-insured pricing business rule.
Age Calculation Date	Used to indicate whether the member person's age should be calculated using the member person's enrollment date or policy's start or renewal date. The valid values are: • Member Enrollment Date • Member Enrollment Nearest Age • Membership Renewal Date	Yes
Age Recalculation Date	Used to indicate whether the member person's age should be recalculated using the member person's enrollment date or policy's start or renewal date. The valid values are: • After Birthday Month • Membership Renewal Date • Nearest Birthday	No
Young Adult Applicability	Used to indicate that the child or dependent enrolling in the membership becomes the young adult in the enrollment period.	No
Young Adult Max Age Limit	Used to specify the maximum age limit for young adults which are eligible for premium calculation. **Note:** This field is enabled only when the **Young Adult Applicability** check box is selected.	Yes (Conditional) **Note:** This field is required if you have selected the **Young Adult Applicability** check box.
Member Relationship Derivation Date	Used to indicate the member relationship for a member person. The valid values are:	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	• Member Date of Birth • Member Enrollment Date	

6. Enter the required details in the **Fully-Insured Pricing Business Rule** screen.
7. If you want to define more than one fully-insured pricing business rule, click the **Add** (+) icon and then repeat step 6.

Note: However, if you want to remove a fully-insured pricing business rule, click the **Delete** (🗑) icon corresponding to the **Criteria Description** field.

8. Click **Save**.
   The fully-insured pricing business rule is defined.

Related Topics

For more information on...	See...
Business Rule screen	Business Rule (Used for Searching) on page 3712

Defining a New Born Business Rule

To define a new born business rule, you should have:

- Business rule type defined in the application
- Newborn business rule category defined in the application
- Values defined in the **BUS_RULE_CAT_FLG** lookup field
- Status defined for the newborn business rule in the application

Procedure

To define a newborn business rule:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **B** and then click **Business Rule**.
   A sub-menu appears.
3. Click the **Add** option from the **Business Rule** sub-menu.

   The **Select Business Category** screen appears. It contains the following field:

Field Name	Field Description	Mandatory (Yes or No)
Business Rule Category	Used to indicate the business rule category using which you want to create a business rule. The valid values are: • Binder Payment Business Rule • Fully-Insured Pricing Business Rule • New Born Business Rule • Rate Guarantee Business Rule	Yes

Note: Alternatively, you can access the **Business Rule Category** screen by clicking the **Add** button in the **Page Title** area of the **Business Rule** screen.

4. Select the **New Born Business Rule** option from the **Business Rule Category** list.
5. Click **OK**.
   The **New Born Business Rule** screen appears. It contains the following fields:

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Field Name	Field Description	Mandatory (Yes or No)
Criteria Description	Used to indicate the business criteria for the newborn business rule. **Note:** The **Search** (🔍) icon appears corresponding to the **Criteria Description** field. On clicking the **Search** icon, the **Business Rule Criteria Search** window appears.	Yes
Effective Date	Used to specify the date from when the newborn business rule is effective.	Yes
Status	Used to indicate the status of the newborn business rule. **Note:** It is a read-only field. By default, the **Active** option is selected.	Not applicable
Gift Days Applicability	Used to indicate whether you want to offer gift days in case of a newborn child.	No
New Born Gift Days	Used to specify the number of days you want to offer as gift days from the newborn child's birth date. **Note:** By default, this field is disabled. It is enabled when you select the **Gift Days Applicability** check box. The value for this field must be a positive integer.	Yes (Conditional) **Note:** This field is required if you select the **Gift Days Applicability** check box.

6. Enter the required details in the **New Born Business Rule** screen.
7. If you want to define more than one newborn business rule, click the **Add** (+) icon and then repeat step 6.

Note: However, if you want to remove a newborn business rule, click the **Delete** (🗑) icon corresponding to the **Criteria Description** field.

8. Click **Save**.
   The newborn business rule is defined.

Related Topics

For more information on...	See...
Business Rule screen	Business Rule (Used for Searching) on page 3712

Defining a Rate Guarantee Business Rule

To define a rate guarantee business rule, you should have:

- Business rule type defined in the application
- Rate guarantee business rule category defined in the application
- Values defined in the **BUS_RULE_CAT_FLG** lookup field
- Status defined for the rate guarantee business rule in the application

Procedure

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To define a rate guarantee business rule:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **B** and then click **Business Rule**.
   A sub-menu appears.
3. Click the **Add** option from the **Business Rule** sub-menu.

   The **Select Business Category** screen appears. It contains the following field:

Field Name	Field Description	Mandatory (Yes or No)
Business Rule Category	Used to indicate the business rule category using which you want to create a business rule. The valid values are: • Binder Payment Business Rule • Fully-Insured Pricing Business Rule • New Born Business Rule • Rate Guarantee Business Rule	Yes

Note: Alternatively, you can access the **Business Rule Category** screen by clicking the **Add** button in the **Page Title** area of the **Business Rule** screen.

4. Select the **Rate Guarantee Business Rule** option from the **Business Rule Category** list.
5. Click **OK**.
   The **Rate Guarantee Business Rule** screen appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Criteria Description	Used to indicate the business criteria for the rate guarantee business rule. **Note:** The **Search** (🔍) icon appears corresponding to the **Criteria Description** field. On clicking the **Search** icon, the **Business Rule Criteria Search** window appears.	Yes
Effective Date	Used to specify the date from when the rate guarantee business rule is effective.	Yes
Status	Used to indicate the status of the rate guarantee business rule. **Note:** It is a read-only field. By default, the **Active** option is selected.	Not applicable
Rate Guarantee Applicability	Used to indicate whether the rate guarantee is available for the individual membership.	No
Rate Guarantee Period	Used to specify the rate guarantee period for the individual membership.	Yes (Conditional)

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Field Name	Field Description	Mandatory (Yes or No)
	Note: By default, this field is disabled. It is enabled when you select the **Rate Guarantee Applicability** check box. The value for this field must be a positive integer.	**Note:** This field is required if you select the **Rate Guarantee Applicability** check box.

6. Enter the required details in the **New Born Business Rule** screen.
7. If you want to define more than one rate guarantee business rule, click the **Add** (+) icon and then repeat step 6.

Note: However, if you want to remove a rate guarantee business rule, click the **Delete** (🗑) icon corresponding to the **Criteria Description** field.

8. Click **Save**.
   The rate guarantee business rule is defined.

Related Topics

For more information on...	See...
Business Rule screen	Business Rule (Used for Searching) on page 3712

Defining a Refund/Write Off Business Rule

Prerequisites

To define a refund/write off business rule, you should have:

- Required business rule criteria defined in the application

Procedure

To define a refund write/off business rule:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **B** and then click **Business Rule**.
   A sub-menu appears.
3. Click the **Add** option from the **Business Rule** sub-menu.

   The **Select Business Rule Category** screen appears. It contains the following field:

Field Name	Field Description	Mandatory (Yes or No)
Business Rule Category	Used to indicate the category for which you want to create a business rule. The valid values are: • Binder Payment Business Rule • Delinquency Event Attributes Business Rule • Delinquency Grace Period Business Rule • Delinquency Miscellaneous Options Business Rule • Delinquency Termination Date Rule Business Rule • Fully-Insured Pricing Business Rule • New Born Business Rule • Rate Guarantee Business Rule • Refund/Write Off Business Rule	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The list includes only those values which are defined in the **BUS_RULE_CAT_FLG** lookup field. You must select the **Refund Write-Off Business Rule** option from the list while creating a refund/write off business rule.	

Note: Alternatively, you can access the **Refund Write-Off Business Rule** screen by clicking the **Add** button in the **Page Title** area of the **Business Rule** screen.

4. Select the **Refund Write-Off Business Rule** option from the **Business Rule Category** list.
5. Click **OK**.

The **Refund Write-Off Business Rule** screen appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Criteria Description	Used to indicate the criteria for the refund/write off business rule. **Note:** The **Search** (🔍) icon appears corresponding to the **Criteria Description** field. On clicking the **Search** icon, the **Business Rule Criteria Search** window appears.	Yes
Effective Date	Used to specify the date from when the business rule is effective. **Note:** You can either manually specify the date or select it using the **Date Picker** (📅) icon corresponding to the field.	Yes
Status	Indicates the status of the business rule. **Note:** This field is disabled. By default, the status is set to **Active**.	Not applicable
Refund Threshold Amount	Used to specify the threshold amount for refund. The system creates automatic refund for an account when the account balance is greater than or equal to the refund threshold amount. **Note:** If you do not specify any value, by default, it is set to **zero (0.00)**.	No
Defer Refund (In Days)	Used to specify the number of days till when you want to defer automatic refund for an account. It is used to calculate the automatic refund request creation date. **Note:** If you do not specify any value, by default, it is set to **zero (0)**.	No
Write Off Threshold Amount	Used to specify the threshold amount for write off. If the account balance is less than or equal to the write off threshold amount, the system creates automatic write off for an account.	No

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Field Name	Field Description	Mandatory (Yes or No)
	Note: If you do not specify any value, by default, it is set to **zero (0.00)**.	
Defer Write Off (In Days)	Used to specify the number of days till when you want to defer automatic write off for an account. It is used to calculate the automatic write off request creation date.	No
	Note: If you do not specify any value, by default, it is set to **zero (0)**.	

6. Enter the required details in the **Refund/Write Off Business Rule** screen.
7. If you want to define more than one refund/write off business rule, click the **Add** (+) icon and then repeat step 6.

Note: However, if you want to remove a refund/write off business rule, click the **Delete** (🗑) icon corresponding to the **Criteria Description** field.

8. Click **Save**.
   The refund/write off business rule is defined.

Related Topics

For more information on...	See...
Business Rule screen	Business Rule (Used for Searching) on page 3712

Defining a Delinquency Grace Period Business Rule

Prerequisites

To define a delinquency grace period business rule, you should have:

- Required business rule criteria defined in the application

Procedure

To define a delinquency grace period business rule:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **B** and then click **Business Rule**.
   A sub-menu appears.
3. Click the **Add** option from the **Business Rule** sub-menu.

   The **Select Business Rule Category** screen appears. It contains the following field:

Field Name	Field Description	Mandatory (Yes or No)
Business Rule Category	Used to indicate the category for which you want to create a business rule. The valid values are: • Binder Payment Business Rule • Delinquency Event Attributes Business Rule • Delinquency Grace Period Business Rule • Delinquency Miscellaneous Options Business Rule • Delinquency Termination Date Rule Business Rule • Fully-Insured Pricing Business Rule	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	• New Born Business Rule • Rate Guarantee Business Rule • Refund/Write Off Business Rule	
	Note: The list includes only those values which are defined in the **BUS_RULE_CAT_FLG** lookup field. You must select the **Delinquency Grace Period Business Rule** option from the list while creating a delinquency grace period business rule.	

Note: Alternatively, you can access the **Delinquency Grace Period Business Rule** screen by clicking the **Add** button in the **Page Title** area of the **Business Rule** screen.

4. Select the **Delinquency Grace Period Business Rule** option from the **Business Rule Category** list.
5. Click **OK**.

The **Delinquency Grace Period Business Rule** screen appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Criteria Description	Used to indicate the criteria for the delinquency grace period business rule. **Note:** The **Search** (🔍) icon appears corresponding to the **Criteria Description** field. On clicking the **Search** icon, the **Business Rule Criteria Search** window appears.	Yes
Effective Date	Used to specify the date from when the business rule is effective. **Note:** You can either manually specify the date or select it using the **Date Picker** (📅) icon corresponding to the field.	Yes
Status	Indicates the status of the business rule. **Note:** This field is disabled. By default, the status is set to **Active**.	Not applicable
Grace Period Type	Used to indicate whether the grace period is in days or months. The valid values are: • Day(s) • Month(s)	Yes
Grace Period	Used to specify the number of days of grace you want to offer from the grace start date.	No

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Field Name	Field Description	Mandatory (Yes or No)
	Note: For example, if the trigger date calculation mode in the respective delinquency process type is set to **Latest Bill Due Date with Grace Period** and if a delinquency process contains bills with the latest bill due date as 01-Jan-2026, the system considers the latest bill due date as the grace start date. Now, if the grace period is set to 30 days, the system sets the grace end date to 31-Jan-2026 using the following formula: `Grace End Date = Grace Start Date + Grace Period` If you do not specify any value, by default, it is set to **zero (0)**. If the drag days (i.e., additional grace days (if any)) are offered at the account or person level, then these drag days are considered while calculating the grace end date when the trigger date calculation mode (in the respective delinquency process type) is set to either **Latest Bill Due Date with Grace Period** or **Usage Basis**. For example, if the latest bill due date is 05-Jan-2026, grace period is set to 5 days, and drag days is to 10 days (for the respective account), then the grace end date is set to 20-Jan-2026.	

6. Enter the required details in the **Delinquency Grace Period Business Rule** screen.
7. If you want to define more than one delinquency grace period business rule, click the **Add** (+) icon and then repeat step 6.

Note: However, if you want to remove a delinquency grace period business rule, click the **Delete** (🗑) icon corresponding to the **Criteria Description** field.

8. Click **Save**.
   The delinquency grace period business rule is defined.

Related Topics

For more information on...	See...
Business Rule screen	Business Rule (Used for Searching) on page 3712

Defining a Delinquency Event Attributes Business Rule

Prerequisites

To define a delinquency event attributes business rule, you should have:

- Required business rule criteria defined in the application

Procedure

To define a delinquency event attributes business rule:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **B** and then click **Business Rule**.
   A sub-menu appears.
3. Click the **Add** option from the **Business Rule** sub-menu.

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The **Select Business Category** screen appears. It contains the following field:

Field Name	Field Description	Mandatory (Yes or No)
Business Rule Category	Used to indicate the business rule category using which you want to create a business rule. The valid values are: • Binder Payment Business Rule • Delinquency Event Attributes Business Rule • Delinquency Grace Period Business Rule • Delinquency Miscellaneous Options Business Rule • Delinquency Termination Date Rule Business Rule • Fully-Insured Pricing Business Rule • New Born Business Rule • Rate Guarantee Business Rule	Yes
	Note: The list includes only those values which are defined in the **BUS_RULE_CAT_FLG** lookup field. You must select the **Delinquency Event Attributes Business Rule** option from the list while creating a delinquency event attributes business rule.	

Note: Alternatively, you can access the **Business Rule Category** screen by clicking the **Add** button in the **Page Title** area of the **Business Rule** screen.

4. Select the **Delinquency Event Attributes Business Rule** option from the **Business Rule Category** list.
5. Click **OK**.
   The **Delinquency Event Attributes Business Rule** screen appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Criteria Description	Used to indicate the criteria for the delinquency event attributes business rule.	Yes
	Note: The **Search** (🔍) icon appears corresponding to the **Criteria Description** field. On clicking the **Search** icon, the **Business Rule Criteria Search** window appears.	
Effective Date	Used to specify the date from when the business rule is effective.	Yes
	Note: You can either manually specify the date or select it using the **Date Picker** (📅) icon corresponding to the field.	
Status	Indicates the status of the business rule.	Not applicable
	Note: This field is disabled. By default, the status is set to **Active**.	
Wait Days	Used to indicate the number of days for which you want to delay a delinquency event in a delinquency process.	No

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Field Name	Field Description	Mandatory (Yes or No)
	Note: If you do not specify any value, by default, it is set to **zero (0)**.	
Wait Month	Used to indicate the number of months for which you want to delay a delinquency event in a delinquency process. **Note:** If you do not specify any value, by default, it is set to **zero (0)**.	No
Wait Day Of Month	Used to indicate the day of the month when you want to trigger a delinquency event in a delinquency process. **Note:** If you do not specify any value, by default, it is set to **zero (0)**.	No
Send Membership Level Notification	Used to indicate whether you want to create a customer contact for the main subscriber of each membership billed to the delinquent customer or account. The valid values are: • **Send Membership Level Notification Required** - Used when you want to create a customer contact for the main subscriber of each membership billed to the delinquent customer or account. • **Send Membership Level Notification Not Required** - Used when you do not want to create a customer contact for each membership billed to the delinquent customer or account. **Note:** For more information, see Creating Customer Contacts for Each Membership Billed to Delinquent Customer or Account on page 4188	No

6. Enter the required details in the **Delinquency Event Attributes Business Rule** screen.
7. If you want to define more than one delinquency event attributes business rule, click the **Add** (+) icon and then repeat step 6.

Note: However, if you want to remove a delinquency event attributes business rule, click the **Delete** (🗑) icon corresponding to the **Criteria Description** field.

8. Click **Save**.
   The new delinquency event attributes rule is defined.

Related Topics

For more information on...	See...
Business Rule screen	Business Rule (Used for Searching) on page 3712

Defining a Delinquency Termination Date Rule Business Rule

To define a delinquency termination date rule business rule, you should have:

- Business rule type defined in the application

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- Delinquency termination date rule business rule category defined in the application
- Values defined in the **BUS_RULE_CAT_FLG** lookup field
- Status defined for the delinquency termination date rule business rule in the application

Procedure

To define a delinquency termination date rule business rule:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **B** and then click **Business Rule**.
   A sub-menu appears.
3. Click the **Add** option from the **Business Rule** sub-menu.

   The **Select Business Category** screen appears. It contains the following field:

Field Name	Field Description	Mandatory (Yes or No)
Business Rule Category	Used to indicate the business rule category using which you want to create a business rule. The valid values are: • Binder Payment Business Rule • Delinquency Event Attributes Business Rule • Delinquency Grace Period Business Rule • Delinquency Miscellaneous Options Business Rule • Delinquency Termination Date Rule Business Rule • Fully-Insured Pricing Business Rule • New Born Business Rule • Rate Guarantee Business Rule	Yes

Note: Alternatively, you can access the **Business Rule Category** screen by clicking the **Add** button in the **Page Title** area of the **Business Rule** screen.

4. Select the **Delinquency Termination Date Rule Business Rule** option from the **Business Rule Category** list.
5. Click **OK**.
   The **Delinquency Termination Date Rule Business Rule** screen appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Criteria Description	Used to indicate the business criteria that an individual membership must satisfy in order to derive the termination date rule from the business rule. **Note:** The **Search** (🔍) icon appears corresponding to the **Criteria Description** field. On clicking the **Search** icon, the **Business Rule Criteria Search** window appears.	Yes
Effective Date	Used to specify the date from when the business rule is effective.	Yes
Status	Used to indicate the status of the business rule. The valid values are: • **Active** • **Inactive**	Not applicable

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Field Name	Field Description	Mandatory (Yes or No)
	Note: It is a read-only field. By default, the **Active** option is selected.	
Termination Date Rule	Used to indicate the termination date rule using which you want to calculate the termination date. The valid values are: • Latest Billed Coverage End Date • Latest Due Coverage End Date • X days After Paid Through Date • X Months After Paid Through Date • Month End of Grace Period Start • Month End of Termination Letter Creation • Month End of Termination Request Event • X days After Grace End Date • X days After Termination Request Event	No

6. Enter the required details in the **Delinquency Termination Date Rule** screen.
7. If you want to define more than one delinquency termination date rule business rule, click the **Add** (+) icon and then repeat step 6.

Note: However, if you want to remove a delinquency termination date rule business rule, click the **Delete** (🗑) icon corresponding to the **Criteria Description** field.

8. Click **Save**.
   The delinquency termination date rule business rule is defined.

Related Topics

For more information on...	See...
Business Rule screen	Business Rule (Used for Searching) on page 3712

Defining a Delinquency Miscellaneous Options Business Rule

To define a delinquency miscellaneous options business rule, you should have:

- Business rule type defined in the application
- Delinquency miscellaneous options business rule category defined in the application
- Values defined in the **BUS_RULE_CAT_FLG** lookup field
- Status defined for the delinquency miscellaneous options business rule in the application

Procedure

To define a delinquency miscellaneous options business rule:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **B** and then click **Business Rule**.
   A sub-menu appears.
3. Click the **Add** option from the **Business Rule** sub-menu.

   The **Select Business Category** screen appears. It contains the following field:

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Field Name	Field Description	Mandatory (Yes or No)
Business Rule Category	Used to indicate the business rule category using which you want to create a business rule. The valid values are: • Binder Payment Business Rule • Delinquency Event Attributes Business Rule • Delinquency Grace Period Business Rule • Delinquency Miscellaneous Options Business Rule • Delinquency Termination Date Rule Business Rule • Fully-Insured Pricing Business Rule • New Born Business Rule • Rate Guarantee Business Rule	Yes

Note: Alternatively, you can access the **Business Rule Category** screen by clicking the **Add** button in the **Page Title** area of the **Business Rule** screen.

4. Select the **Delinquency Miscellaneous Options Business Rule** option from the **Business Rule Category** list.
5. Click **OK**.
   The **Delinquency Miscellaneous Options Business Rule** screen appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Criteria Description	Used to indicate the business criteria that an individual membership must satisfy in order to derive the required parameters from the business rule. **Note:** The **Search** (🔍) icon appears corresponding to the **Criteria Description** field. On clicking the **Search** icon, the **Business Rule Criteria Search** window appears.	Yes
Effective Date	Used to specify the date from when the business rule is effective.	Yes
Status	Used to indicate the status of the business rule. The valid values are: • **Active** • **Inactive** **Note:** It is a read-only field. By default, the **Active** option is selected.	Not applicable
Trigger Date Recalculation On Hold Release	Used to indicate whether the trigger dates of delinquency events should be recalculated when the hold on the delinquency process is released. The valid values are: • **Yes** • **No**	No
Trigger Date Recalculation On Resume	Used to indicate whether the trigger dates of delinquency events should be recalculated when the delinquency process is resumed after cancellation. The valid values are:	No

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Field Name	Field Description	Mandatory (Yes or No)
	• **Yes** • **No**	
Trigger Termination Process	Used to indicate when you want the system to send an outbound message to the enrollment system for terminating the individual memberships billed to the delinquent account. The valid values are: • **After X Days** - Used when you want the system to send an outbound message for termination after X number of days from the date when the termination event is triggered. • **Immediate** - Used when you want the system to send an outbound message for termination on the same day when the termination event is triggered. • **Month End** - Used when you want the system to send an outbound message for termination at the end of the month when the termination event is triggered.	No
Termination Wait Days	Used to specify the number of days after which an outbound message for termination should be sent to the enrollment system. **Note:** The system sets the termination wait days to zero, if you do not specify a value while defining or editing a delinquency process type. This field is required only when the **Trigger Termination Process** field in the business rule is set to **After X Days**.	No
Allow Automatic Reinstatement	Used to indicate whether you want to allow automatic reinstatement of the individual membership. The valid values are: • Yes • No **Note:** This field is not applicable for **Individual Delinquency**.	No
Maximum Automatic Reinstatement Count	Used to specify the maximum number of time the system allows automatic reinstatement. **Note:** This field is not applicable for **Individual Delinquency**.	No
Trigger Reinstatement Process	Used to indicate an option based on which the reinstatement process must be triggered. The valid values are: • After X Days • Immediate • Month End	No

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Field Name	Field Description	Mandatory (Yes or No)
	Note: This field is not applicable for **Individual Delinquency**.	
Reinstatement Wait Days	Used to specify the wait period (in days) after which the reinstatement process is triggered. **Note:** This field is not applicable for **Individual Delinquency**.	No
Reinstatement Threshold	Used to specify the percentage value based on which the automatic reinstatement takes place. **Note:** This field is not applicable for **Individual Delinquency**.	No
Days Since Termination	Used to specify the number of days since the termination effective date for automatic reinstatement to take place. **Note:** This field is not applicable for **Individual Delinquency**.	No
Member Notification Days	Used to specify the number of days after which the member receives notification. **Note:** This field is not applicable for **Individual Delinquency**.	No
Add Days to Date of Processing of Termination Request	Used to specify the number of days that you want to add to termination request date in order to derive termination effective date. **Note:** This field is not applicable for **Individual Delinquency**.	No
Add Days to Grace End Date	Used to specify the number of days that you want to add to grace end date in order to derive termination effective date.	No
Add Days to Coverage End Date	Used to specify the number of days that you want to add to coverage end date in order to derive termination effective date.	No
Add Days to Paid Through Date	Used to specify the number of days that you want to add to the paid through date (of the account) in order to derive termination effective date.	No
Add Months to Paid Through Date	Used to specify the number of months that you want to add to the paid through month (derived from the paid through date of the account) in order to derive termination effective date.	No

6. Enter the required details in the **Delinquency Miscellaneous Options Business Rule** screen.
7. If you want to define more than one delinquency miscellaneous options business rule, click the **Add** (+) icon and then repeat step 6.

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> **Note:** However, if you want to remove a delinquency miscellaneous options business rule, click the **Delete** (🗑) icon corresponding to the **Criteria Description** field.

8. Click **Save**.
   The delinquency miscellaneous options business rule is defined.

Related Topics

For more information on...	See...
Business Rule screen	Business Rule (Used for Searching) on page 3712

Editing a Binder Payment Business Rule

To edit a binder payment business rule, you should have:

- Status defined for the binder payment business rule in the application

Procedure

To edit a binder payment business rule:

1. Search for the binder payment business rule in the **Business Rule** screen.
2. In the **Search Results** section, select the check box corresponding to the **Criteria Description** column and click the **Edit** button.

> **Note:**
>
> You can edit more than one binder payment business rules by selecting multiple check boxes.
>
> You can edit the binder payment business rule when it is not yet used in the system.

The **Binder Payment Business Rule** screen appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Criteria Description	Displays the business criteria for the binder payment business rule. **Note:** This is a read-only field.	Not applicable
Effective Date	Used to specify the date from when the binder payment business rule is effective.	Yes
Status	Used to indicate the status of the binder payment business rule. The valid values are: • Active • Inactive	Yes
Binder Payment Applicability	Used to indicate that you want the system to monitor whether the binder payment is received or not before activating the individual membership.	No
Threshold Percentage	Used to specify the threshold percentage using which the threshold amount should be calculated. **Note:** This field is enabled only when the **Binder Payment Applicability** check box is selected.	No

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Field Name	Field Description	Mandatory (Yes or No)
Grace Days	Used to calculate the grace date for the individual membership. **Note:** The grace days cannot be less than or equal to zero. This field is enabled only when the **Binder Payment Applicability** check box is selected.	Yes (Conditional) **Note:** This field is required if the **Binder Payment Applicability** check box is selected.
Hold Billing	Used to indicate whether you want to hold the bill generation process for the individual membership until the binder payment is received. **Note:** This field is enabled only when the **Binder Payment Applicability** check box is selected.	No

3. Modify the required details in the **Binder Payment Business Rule** screen.
4. Click **Save**.
   The changes made to the binder payment business rule are saved.

Related Topics

For more information on...	See...
Business Rule screen	Business Rule (Used for Searching) on page 3712
How to define a binder payment business rule	Defining a Binder Payment Business Rule on page 3720

Editing a Fully-Insured Pricing Business Rule

To edit a fully-insured pricing business rule, you should have:

- Status defined for the fully-insured pricing business rule in the application

Procedure

To edit a fully-insured pricing business rule:

1. Search for the fully-insured pricing business rule in the **Business Rule** screen.
2. In the **Search Results** section, select the check box corresponding to the **Criteria Description** column and click the **Edit** button.

Note:

You can edit more than one fully-insured pricing business rules by selecting multiple check boxes.

You can edit the fully-insured pricing business rule when it is not yet used in the system.

The **Fully-Insured Pricing Business Rule** screen appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Criteria Description	Displays the business criteria for the fully-insured pricing business rule.	Not applicable

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Field Name	Field Description	Mandatory (Yes or No)
	Note: This is a read-only field.	
Effective Date	Used to specify the date from when the fully-insured pricing business rule is effective.	Yes
Status	Used to indicate the status of the fully-insured pricing business rule. The valid values are: • Active • Inactive	Yes
Maximum Dependents	Used to specify the maximum number of children which are eligible for premium calculation. **Note:** The value for this field must either be zero (0) or a positive integer.	No
Dependent Max Age Limit	Used to specify the maximum age limit for children eligible for premium calculation. **Note:** The value for this field must either be zero (0) or a positive integer.	Yes (Conditional) **Note:** This field is required when you have specified zero (0) in the **Maximum Dependents** field while defining a fully-insured pricing business rule.
Dependent Order Priority	Used to indicate the order priority of the dependent during premium calculation. The valid values are: • Eldest • Youngest	Yes (Conditional) **Note:** This field is required when you have specified zero (0) in the **Maximum Dependents** field while defining a fully-insured pricing business rule.
Age Calculation Date	Used to indicate whether the member person's age should be calculated using the member person's enrollment date or policy's start or renewal date. The valid values are: • Member Enrollment Date • Member Enrollment Nearest Age • Membership Renewal Date	Yes
Age Recalculation Date	Used to indicate whether the member person's age should be recalculated using the member person's enrollment date or policy's start or renewal date. The valid values are: • After Birthday Month • Membership Renewal Date • Nearest Birthday	No

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Field Name	Field Description	Mandatory (Yes or No)
Young Adult Applicability	Used to indicate that the child or dependent enrolling in the membership becomes the young adult in the enrollment period.	No
Young Adult Max Age Limit	Used to specify the maximum age limit for young adults which are eligible for premium calculation. **Note:** This field is enabled only when the **Young Adult Applicability** check box is selected.	Yes (Conditional) **Note:** This field is required if you have selected the **Young Adult Applicability** check box.
Member Relationship Derivation Date	Used to indicate the member relationship for a member person. The valid values are: • Member Date of Birth • Member Enrollment Date	Yes

3. Modify the required details in the **Fully-Insured Pricing Business Rule** screen.
4. Click **Save**.
   The changes made to the fully-insured pricing business rule are saved.

Related Topics

For more information on...	See...
Business Rule screen	Business Rule (Used for Searching) on page 3712
How to define a fully-insured pricing business rule	Defining a Fully-Insured Pricing Business Rule on page 3721

Editing a New Born Business Rule

To edit a newborn business rule business rule, you should have:

- Status defined for the newborn business rule in the application

Procedure

To edit a newborn business rule:

1. Search for the newborn business rule in the **Business Rule** screen.
2. In the **Search Results** section, select the check box corresponding to the **Criteria Description** column and click the **Edit** button.

Note:

You can also edit more than one newborn business rule by selecting multiple check boxes and clicking the **Edit** button.

You can edit the newborn business rule when it is not yet used in the system.

The **New Born Business Rule** screen appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Criteria Description	Displays the business criteria for the newborn business rule. **Note:** This is a read-only field.	Not applicable

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Field Name	Field Description	Mandatory (Yes or No)
Effective Date	Used to specify the date from when the newborn business rule is effective.	Yes
Status	Used to indicate the status of the newborn business rule. The valid values are: • Active • Inactive	Yes
Gift Days Applicability	Used to indicate whether you want to offer gift days in case of a newborn child.	No
New Born Gift Days	Used to specify the number of days you want to offer as gift days from the newborn child's birth date. **Note:** By default, this field is disabled. It is enabled when you select the **Gift Days Applicability** check box. The value for this field must be a positive integer.	Yes (Conditional) **Note:** This field is required if you select the **Gift Days Applicability** check box.

3. Modify the required details in the **New Born Business Rule** screen.
4. Click **Save**.
   The changes made to the newborn business rules are saved.

Related Topics

For more information on...	See...
Business Rule screen	Business Rule (Used for Searching) on page 3712
How to define a newborn business rule	Defining a New Born Business Rule on page 3724

Editing a Rate Guarantee Business Rule

To edit a rate guarantee business rule, you should have:

- Status defined for the rate guarantee business rule in the application

Procedure

To edit a rate guarantee business rule:

1. Search for the rate guarantee business rule in the **Business Rule** screen.
2. In the **Search Results** section, select the check box corresponding to the **Criteria Description** column and click the **Edit** button.

Note:

You can edit more than one rate guarantee business rules by selecting multiple check boxes.

You can edit the rate guarantee business rule when it is not yet used in the system.

The **Rate Guarantee Business Rule** screen appears. It contains the following fields:

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Field Name	Field Description	Mandatory (Yes or No)
Criteria Description	Displays the business criteria for the rate guarantee business rule. **Note:** This is a read-only field.	Not applicable
Effective Date	Used to specify the date from when the rate guarantee business rule is effective.	Yes
Status	Used to indicate the status of the rate guarantee business rule. The valid values are: • Active • Inactive	Yes
Rate Guarantee Applicability	Used to indicate whether the rate guarantee is available for the individual membership.	No
Rate Guarantee Period	Used to specify the rate guarantee period for the individual membership. **Note:** By default, this field is disabled. It is enabled when you select the **Rate Guarantee Applicability** check box. The value for this field must be a positive integer.	Yes (Conditional) **Note:** This field is required if you select the **Rate Guarantee Applicability** check box.

3. Modify the required details in the **Rate Guarantee Business Rule** screen.
4. Click **Save**.
   The changes made to the rate guarantee business rule are saved.

Related Topics

For more information on...	See...
Business Rule screen	Business Rule (Used for Searching) on page 3712
How to define a rate guarantee business rule	Defining a Rate Guarantee Business Rule on page 3725

Editing a Refund/Write Off Business Rule

Procedure

To edit a refund write/off business rule:

1. Search for the refund/write off business rule in the **Business Rule** screen.
2. In the **Search Results** section, select the check box corresponding to the refund/write off business rule and then click the **Edit** button.

Note:

You can edit multiple refund/write off business rules at once by selecting the check boxes corresponding to them and then clicking the **Edit** button.

You can edit the refund/write off business rule only when it is not yet used in the system.

The **Refund/Write Off Business Rule** screen appears. It contains the following fields:

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Field Name	Field Description	Mandatory (Yes or No)
Criteria Description	Indicates the criteria for the refund/write off business rule. **Note:** By default, this field is non-editable.	Not applicable
Effective Date	Used to specify the date from when the business rule is effective. **Note:** You can either manually specify the date or select it using the **Date Picker** ( ) icon corresponding to the field.	Yes
Status	Used to indicate the status of the business rule. The valid values are: • Active • Inactive	Yes
Refund Threshold Amount	Used to specify the threshold amount for refund. The system creates automatic refund for an account when the account balance is greater than or equal to the refund threshold amount. **Note:** If you do not specify any value, by default, it is set to **zero (0.00)**.	No
Defer Refund (In Days)	Used to specify the number of days till when you want to defer automatic refund for an account. It is used to calculate the automatic refund request creation date. **Note:** If you do not specify any value, by default, it is set to **zero (0)**.	No
Write Off Threshold Amount	Used to specify the threshold amount for write off. If the account balance is less than or equal to the write off threshold amount, the system creates automatic write off for an account. **Note:** If you do not specify any value, by default, it is set to **zero (0.00)**.	No
Defer Write Off (In Days)	Used to specify the number of days till when you want to defer automatic write off for an account. It is used to calculate the automatic write off request creation date. **Note:** If you do not specify any value, by default, it is set to **zero (0)**.	No

3. Modify the required details in the **Refund/Write Off Business Rule** screen.
4. Click **Save**.
   The changes made to the refund/write off business rule are saved.

Related Topics

For more information on...	See...
Business Rule screen	Business Rule (Used for Searching) on page 3712
How to define a refund/write off business rule	Defining a Refund/Write Off Business Rule on page 3727

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Editing a Delinquency Grace Period Business Rule

Procedure

To edit a delinquency grace period business rule:

1. Search for the delinquency grace period business rule in the **Business Rule** screen.
2. In the **Search Results** section, select the check box corresponding to the delinquency grace period business rule and then click the **Edit** button.

> **Note:**
>
> You can edit multiple delinquency grace period business rules at once by selecting the check boxes corresponding to them and then clicking the **Edit** button.
>
> You can edit the delinquency grace period business rule only when it is not yet used in the system.

The **Delinquency Grace Period Business Rule** screen appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Criteria Description	Indicates the criteria for the delinquency grace period business rule. **Note:** By default, this field is non-editable.	Not applicable
Effective Date	Used to specify the date from when the business rule is effective. **Note:** You can either manually specify the date or select it using the **Date Picker** ( ) icon corresponding to the field.	Yes
Status	Used to indicate the status of the business rule. The valid values are: • Active • Inactive	Yes
Grace Period Type	Used to indicate whether the grace period is in days or months. The valid values are: • Day(s) • Month(s)	Yes
Grace Period	Used to specify the number of days of grace you want to offer from the grace start date.	No

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Field Name	Field Description	Mandatory (Yes or No)
	Note: For example, if the trigger date calculation mode in the respective delinquency process type is set to **Latest Bill Due Date with Grace Period** and if a delinquency process contains bills with the latest bill due date as 01-Jan-2026, the system considers the latest bill due date as the grace start date. Now, if the grace period is set to 30 days, the system sets the grace end date to 31-Jan-2026 using the following formula: `Grace End Date = Grace Start Date + Grace Period` If you do not specify any value, by default, it is set to **zero (0)**. If the drag days (i.e., additional grace days (if any)) are offered at the account or person level, then these drag days are considered while calculating the grace end date when the trigger date calculation mode (in the respective delinquency process type) is set to either **Latest Bill Due Date with Grace Period** or **Usage Basis**. For example, if the latest bill due date is 05-Jan-2026, grace period is set to 5 days, and drag days is to 10 days (for the respective account), then the grace end date is set to 20-Jan-2026.	

3. Modify the required details in the **Delinquency Grace Period Business Rule** screen.
4. Click **Save**.
   The changes made to the delinquency grace period business rule are saved.

Related Topics

For more information on...	See...
Business Rule screen	Business Rule (Used for Searching) on page 3712
How to define a delinquency grace period business rule	Defining a Delinquency Grace Period Business Rule on page 3729

Editing a Delinquency Event Attributes Business Rule

Procedure

To edit a delinquency event attributes business rule:

1. Search for the delinquency event attributes business rule in the **Business Rule** screen.
2. In the **Search Results** section, select the check box corresponding to the **Criteria Description** column and click the **Edit** button.

> **Note:**
>
> You can also edit more than one delinquency event attributes business rule by selecting multiple check boxes and clicking the **Edit** button.
>
> You can edit the delinquency event attributes business rule when it is not yet used in the system.

The **Delinquency Event Attributes Business Rule** screen appears. It contains the following fields:

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Field Name	Field Description	Mandatory (Yes or No)
Criteria Description	Indicates the criteria for the delinquency event attributes business rule. **Note:** By default, this field is non-editable.	Not applicable
Effective Date	Used to specify the date from when the business rule is effective. **Note:** You can either manually specify the date or select it using the **Date Picker** ( ) icon corresponding to the field.	Yes
Status	Used to indicate the status of the business rule. The valid values are: • Active • Inactive	Yes
Wait Days	Used to indicate the number of days for which you want to delay a delinquency event in a delinquency process. **Note:** If you do not specify any value, by default, it is set to **zero (0)**.	No
Wait Month	Used to indicate the number of months for which you want to delay a delinquency event in a delinquency process. **Note:** If you do not specify any value, by default, it is set to **zero (0)**.	No
Wait Day of Month	Used to indicate the day of the month when you want to trigger a delinquency event in a delinquency process. **Note:** If you do not specify any value, by default, it is set to **zero (0)**.	No
Send Membership Level Notification	Used to indicate whether you want to create a customer contact for the main subscriber of each membership billed to the delinquent customer or account. The valid values are: • **Send Membership Level Notification Required** - Used when you want to create a customer contact for the main subscriber of each membership billed to the delinquent customer or account. • **Send Membership Level Notification Not Required** - Used when you do not want to create a customer contact for each membership billed to the delinquent customer or account. **Note:** For more information, see Creating Customer Contacts for Each Membership Billed to Delinquent Customer or Account on page 4188	No

3. Modify the required details in the **Delinquency Event Attributes Business Rule** screen.
4. Click **Save**.

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The changes made to the delinquency event attributes business rule are saved.

Related Topics

For more information on...	See...
Business Rule screen	Business Rule (Used for Searching) on page 3712
How to define a delinquency event attributes business rule	Defining a Delinquency Event Attributes Business Rule on page 3731

Editing a Delinquency Termination Date Rule Business Rule

To edit a delinquency termination date rule business rule business rule, you should have:

- Status defined for the delinquency termination date rule business rule in the application

Procedure

To edit a delinquency termination date rule business rule:

1. Search for the delinquency termination date rule business rule in the **Business Rule** screen.
2. In the **Search Results** section, select the check box corresponding to the **Criteria Description** column and click the **Edit** button.

Note:

You can also edit more than one delinquency termination date rule business rule by selecting multiple check boxes and clicking the **Edit** button.

You can edit the delinquency termination date rule business rule only when it is not yet used in the system.

The **Delinquency Termination Date Rule** screen appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Criteria Description	Indicates the business criteria that an individual membership must satisfy in order to derive the termination date rule from the business rule. **Note:** This is a read-only field.	Not applicable
Effective Date	Used to specify the date from when the business rule is effective.	Yes
Status	Used to indicate the status of the business rule. The valid values are: • Active • Inactive	Yes
Termination Date Rule	Used to indicate the termination date rule using which you want to calculate the termination date. The valid values are: • Latest Billed Coverage End Date • Latest Due Coverage End Date • X days After Paid Through Date • X Months After Paid Through Date • Month End of Grace Period Start • Month End of Termination Letter Creation • Month End of Termination Request Event	No

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Field Name	Field Description	Mandatory (Yes or No)
	• X days After Grace End Date • X days After Termination Request Event	

3. Modify the required details in the **Delinquency Termination Date Rule** screen.
4. Click **Save**.
   The changes made to the delinquency termination date rule are saved.

Related Topics

For more information on...	See...
Business Rule screen	Business Rule (Used for Searching) on page 3712
How to define a delinquency termination date rule	Defining a Delinquency Termination Date Rule Business Rule on page 3733

Editing a Delinquency Miscellaneous Options Business Rule

To edit a delinquency miscellaneous options business rule, you should have:

- Status defined for the delinquency miscellaneous options business rule in the application

Procedure

To edit a delinquency miscellaneous options business rule:

1. Search for the delinquency miscellaneous options business rule in the **Business Rule** screen.
2. In the **Search Results** section, select the check box corresponding to the **Criteria Description** column and click the **Edit** button.

> **Note:**
>
> You can also edit more than one delinquency miscellaneous options business rule by selecting multiple check boxes and clicking the **Edit** button.
>
> You can edit the delinquency miscellaneous options business rule when it is not yet used in the system.

The **Delinquency Miscellaneous Options Business Rule** screen appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Criteria Description	Indicates the business criteria that an individual membership must satisfy in order to derive the required parameters from the business rule. **Note:** This is a read-only field.	Not applicable
Effective Date	Used to specify the date from when the business rule is effective.	Yes
Status	Used to indicate the status of the business rule. The valid values are: • Active • Inactive	Yes
Trigger Date Recalculation On Hold Release	Used to indicate whether the trigger dates of delinquency events should be recalculated when the hold on the delinquency process is released. The valid values are:	No

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Field Name	Field Description	Mandatory (Yes or No)
	• **Yes** • **No**	
Trigger Date Recalculation On Resume	Used to indicate whether the trigger dates of delinquency events should be recalculated when the delinquency process is resumed after cancellation. The valid values are: • **Yes** • **No**	No
Trigger Termination Process	Used to indicate when you want the system to send an outbound message to the enrollment system for terminating the individual memberships billed to the delinquent account. The valid values are: • **After X Days** - Used when you want the system to send an outbound message for termination after X number of days from the date when the termination event is triggered. • **Immediate** - Used when you want the system to send an outbound message for termination on the same day when the termination event is triggered. • **Month End** - Used when you want the system to send an outbound message for termination at the end of the month when the termination event is triggered.	No
Termination Wait Days	Used to specify the number of days after which an outbound message for termination should be sent to the enrollment system. **Note:** The system sets the termination wait days to zero, if you do not specify a value while defining or editing a delinquency process type. This field is required only when the **Trigger Termination Process** field in the business rule is set to **After X Days**.	No
Allow Automatic Reinstatement	Used to indicate whether you want to allow automatic reinstatement of the individual membership. The valid values are: • Yes • No **Note:** This field is not applicable for **Individual Delinquency**.	No
Maximum Automatic Reinstatement Count	Used to specify the maximum number of time the system allows automatic reinstatement. **Note:** This field is not applicable for **Individual Delinquency**.	No

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Field Name	Field Description	Mandatory (Yes or No)
Trigger Reinstatement Process	Used to indicate an option based on which the reinstatement process must be triggered. The valid values are: • After X Days • Immediate • Month End **Note:** This field is not applicable for **Individual Delinquency**.	No
Reinstatement Wait Days	Used to specify the wait period (in days) after which the reinstatement process is triggered. **Note:** This field is not applicable for **Individual Delinquency**.	No
Reinstatement Threshold	Used to specify the percentage value based on which the automatic reinstatement takes place. **Note:** This field is not applicable for **Individual Delinquency**.	No
Days Since Termination	Used to specify the number of days since the termination effective date for automatic reinstatement to take place. **Note:** This field is not applicable for **Individual Delinquency**.	No
Member Notification Days	Used to specify the number of days after which the member receives notification. **Note:** This field is not applicable for **Individual Delinquency**.	No
Add Days to Date of Processing of Termination Request	Used to specify the number of days that you want to add to termination request date in order to derive termination effective date. **Note:** This field is not applicable for **Individual Delinquency**.	No
Add Days to Grace End Date	Used to specify the number of days that you want to add to grace end date in order to derive termination effective date.	No
Add Days to Coverage End Date	Used to specify the number of days that you want to add to coverage end date in order to derive termination effective date.	No
Add Days to Paid Through Date	Used to specify the number of days that you want to add to the paid through date (of the account) in order to derive termination effective date.	No
Add Months to Paid Through Date	Used to specify the number of months that you want to add to the paid through month (derived from the paid through	No

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Field Name	Field Description	Mandatory (Yes or No)
	date of the account) in order to derive termination effective date.	

3. Modify the required details in the **Delinquency Miscellaneous Options Business Rule** screen.
4. Click **Save**.
   The changes made to the delinquency miscellaneous options business rule are saved.

Related Topics

For more information on...	See...
Business Rule screen	Business Rule (Used for Searching) on page 3712
How to define a delinquency miscellaneous options business rule	Defining a Delinquency Miscellaneous Options Business Rule on page 3735

Deleting a Business Rule

Procedure

To delete a business rule:

1. Search for the business rule in the **Business Rule** screen.
2. In the **Search Results** section, select the check box corresponding to the business rule which you want to delete.
   You can delete more than one business rule at the same time.
3. Click **Delete**.
   A message appears confirming whether you want to delete the business rule.

> **Note:** You can delete a business rule when it is not yet used in the system.

4. Click **OK**.
   The business rule is deleted.

Related Topics

For more information on...	See...
Business Rule screen	Business Rule (Used for Searching) on page 3712
Search Business Rule zone	Search Business Rule on page 3712

Viewing the Log of a Business Rule

Procedure

To view the log of a business rule:

1. Search for the business rule in the **Business Rule** screen.
2. In the **Search Results** section, click the **Broadcast** ( ) icon corresponding *t*o the business rule whose log details you want to view:
   The **Business Rule Log** zone appears.
3. View the complete trail of actions performed on the business rule in the **Business Rule Log** zone.

Related Topics

For more information on...	See...
Business Rule screen	Business Rule (Used for Searching) on page 3712

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For more information on...	See...
Business Rule Log zone	Business Rule Log on page 3719

Young Adult Coverage in an Individual Membership

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

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

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

- Young Adult Applicability
- Young Adult Max Age Limit

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

- Young Adult Applicability
- Young Adult Max Age Limit

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

Age Calculation During Continuous Individual Membership Coverage

In the fully insured individual line of business, there are scenarios wherein an individual and his/her dependent persons may continuously belong to different memberships of different health plans that belong to the same health product category, such as Medical or Dental, etc. In other words, an individual person has continuous insurance coverage over a period without any lapses or gaps. In such scenarios, the business requires that an individual person's age should be calculated based on the plan year's first continuous coverage start date. For example, in the plan year 2024, if an individual belongs to four memberships with continuous coverage period (for example, M1 with the coverage period 01-Jan-2024 to 31-Mar-2024, M2 with the coverage period 01-Apr-2024 to 30-Jun-2024, M3 with the coverage period 01-Jul-2024 to 30-Sep-2024, and M4 with the coverage period 01-Oct-2024 to 31-Dec-2024), the system should calculate the individual person's age using the M1 coverage start date.

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

- A new algorithm type named **C1-DTCAGEIM** is introduced in this release. An algorithm created using the **C1-DTCAGEIM** algorithm type is attached to the **Audit** system event of the **C1-IndividualMembership** business object. This algorithm determines whether the health plans belong to the same health product category (i.e., first few digits of HIOS ID are same) while deriving continuous coverage individual memberships and the plan year

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start month (i.e., 1 for Jan-Dec, 3 for Mar-Feb, 6 for Jun-May, etc.) based on which first continuous coverage is considered for the plan year.

- The **C1CTRLDT** characteristic type is shipped with the product.

Now, when an individual person belongs to different memberships with continuous coverage period, the system stores the plan year's first continuous coverage start date in the form of characteristic corresponding to the member person using the **C1CTRLDT** characteristic type. The system then considers this characteristic while calculating the individual person's age during premium calculation.

The system stamps this characteristic against the main subscriber and each dependent person in an individual membership. However, in the following scenarios, the **C1CTRLDT** characteristic is not stamped on the respective dependent person:

- A dependent person in any subsequent memberships (i.e., M2, M3, or M4) was not enrolled on the plan year's first continuous coverage membership (i.e. M1) start date.
- A dependent person is not continuously covered in different memberships (for example, DP1 is covered in M1 and M2 for the entire coverage period, covered in M3 from 01-Jul-2024 to 31-Jul-2024, and then covered in M4 for the entire coverage period).

If the characteristic is not stamped on any dependent person in an individual membership, the system calculates the age using the traditional method (i.e., using the age calculation date specified in the fully insured pricing rule business rule).

The above feature is implemented with the basic assumption that the main subscriber would be same in the continuous individual membership coverage. The product does not cater to the scenario wherein the main subscriber is different in the continuous individual membership coverage of a dependent person. To handle such scenarios, you can manually stamp the **C1CTRLDT** characteristic on the dependent person so that the age is calculated during the premium calculation.

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Chapter 43

Individual Health Insurance Billing

While calculating the premium for an individual membership using an age based pricing rule, the system derives the rate for each eligible member person. The system identifies members which are eligible for premium calculation using the fully-insured pricing and newborn business rules.

On creating or editing an individual membership through a health care inbound message or membership repricing inbound web service, the system determines the fully-insured pricing and newborn business rules which are applicable for the individual membership. The system enables you to define business rules of the following categories:

- Fully-Insured Pricing
- New Born

While determining the business rules which are applicable for an individual membership, the system executes the business rules of each category which are effective on the inbound processing date based on the priority of the business rule. If an individual membership meets the criteria of the business rule, the system stamps the respective business rule corresponding to the individual membership. In this way, the system derives two business rules - one fully-insured pricing business rule and another newborn business rule.

While calculating the premium for an individual membership using a tier based pricing rule, the system derives the subscription tier using the fully-insured pricing and newborn business rules.

Once the premium is calculated for an individual membership, the system creates a billable charge for the premium. If the account is defined for the individual membership using the characteristic types specified in the **Account Identifier Type Char Type** and **Account Identifier Value Char Type** option types of the **C1-ASOBLLNG** feature configuration, the system uses the account to bill the charge for the premium. However, if these characteristics are not defined for the individual membership, the system considers the account of the financially responsible member person to the charge for the premium.

Chapter 44

Entity Audit

Topics:

- Audit Event Status Transition
- Prerequisites
- Entity Audit Process
- Algorithms Used in the Entity Audit Process
- Audit Event Type
- Audit Event (Used for Searching)
- Audit Event (Used for Viewing)

Oracle Revenue Management and Billing provides a mechanism wherein auditors can track various actions, such as add, update, and delete for an entity. If the entity audit feature is enabled for a business object, the system creates audit events whenever you define, edit, or delete an entity (which is created using the respective business object). For example, if the entity audit feature is enabled for the **C1-Membership** business object, the system creates an audit event whenever you define, edit, or delete a membership in a policy plan or whenever you add or remove persons from a membership. For more information on how to enable the entity audit feature for a business object, see Prerequisites on page 3760.

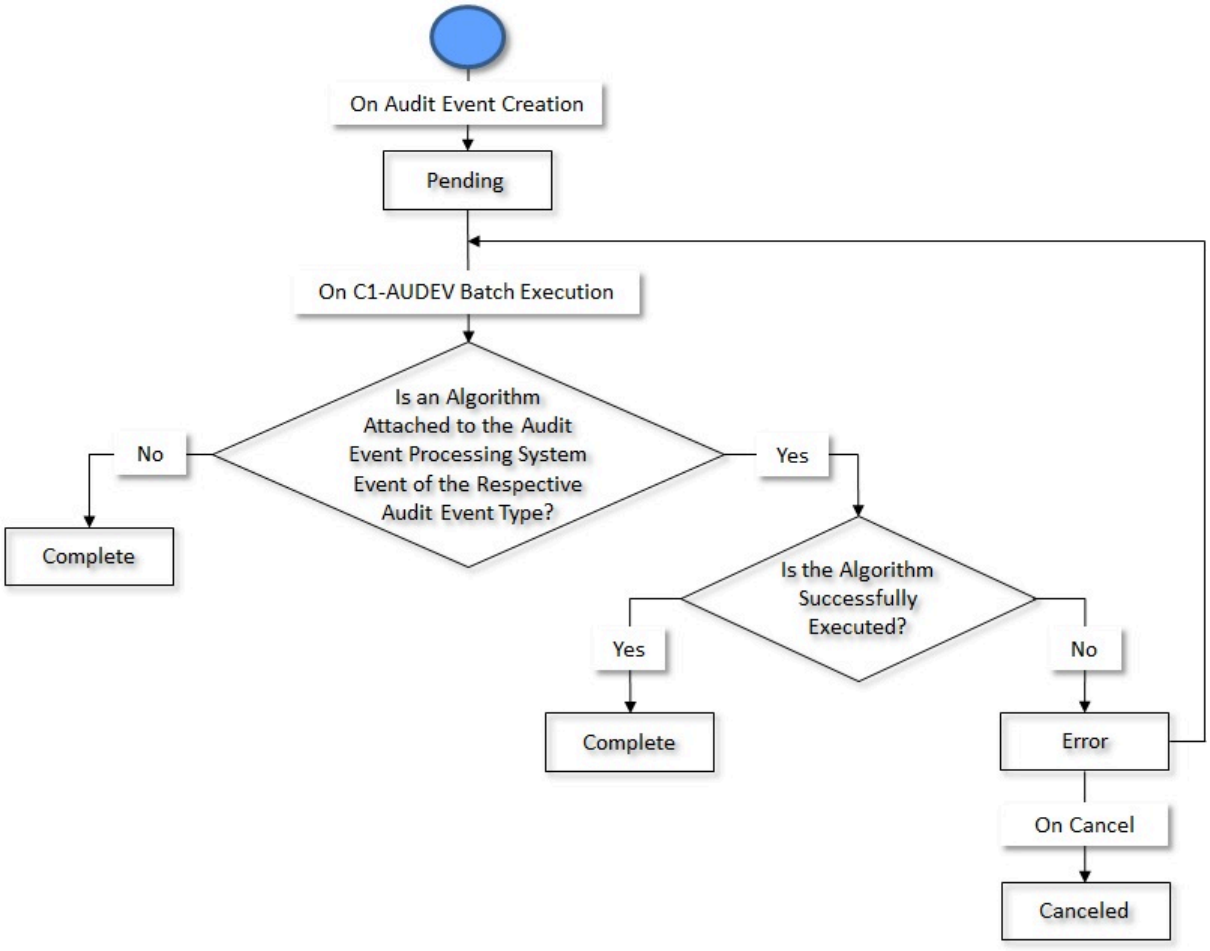
The entity audit process is a two-step process, wherein the system creates the audit events and then processes them whenever the **Audit Event Processing (C1-AUDEV)** batch is executed. For more information about these processes, see the following sections:

- Audit Event Creation on page 3761
- Audit Event Processing on page 3762

During the entity audit process, each audit event goes through various statuses in its lifecycle. For more information about the audit event statuses, see Audit Event Status Transition on page 3760.

Audit Event Status Transition

The following figure graphically indicates how an audit event moves from one status to another in its lifecycle:



Prerequisites

To setup the entity audit feature for a business object, you need to do the following:

- Set the **Eligible for Audit Event** option type of the entity business object to **Y**.

  Note: The **Eligible for Audit Event** option type is available for the entity business object when the **Valid BO Option Type** option type of the respective maintenance object is set to **C1AT**.

- Attach an algorithm created using the **C1-REAUDEVNT** algorithm type to the **Audit** system event of the entity business object.

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Note:

At present, this algorithm is designed to work with the following business objects:

- C1-POLICY
- C1-ASOPolicy
- C1-Membership
- C1-PolicyPlan
- C1_PERSON_BO
- C1-PricingRuleTierBased
- C1-PricingRuleAgeBased

If you want to use the audit algorithm for the business objects which are not listed above, you need to create a custom audit algorithm.

- Define an active audit event type for the entity business object in the system.
- Define the required algorithm types where the algorithm entity is set to **Audit Event Processing**.
- Create the required algorithms and attach them to the **Audit Event Processing** system event of the audit event type.

Note: The **C1-AUDEVMPR** algorithm type is shipped with the product. You must attach an algorithm created using the **C1-AUDEVMPR** algorithm type to the audit event types which are defined for the **C1-PricingRuleTierBased** and **C1-PricingRuleAgeBased** business objects.

- Define the values for the **AUDIT_USAGE_FLG** lookup field
- Define the required characteristic types where the characteristic entity is set to **Audit Event Type**.

Entity Audit Process

The entity audit process consists of the following two sub-processes:

- Audit Event Creation on page 3761
- Audit Event Processing on page 3762

Audit Event Creation

If you add, edit, or delete an entity which is created using a business object for which the entity audit feature is enabled, the system checks whether an active audit event type exists for the entity business object. If so, it considers the active audit event type and creates the audit event using the respective audit event type. The system creates the audit event while:

- Defining an entity when the **Add Action** option is selected in the audit event type
- Editing an entity when the **Update All** option is selected in the audit event type or when the updated element is listed in the **Audit Elements for Entity Update** section
- Deleting an entity when the **Delete Action** option is selected in the audit event type

For more information about the audit event type, see Audit Event Type on page 3763.

The audit event is created in the **Pending** status. Note that the system creates one audit event for the entity irrespective of the number of changes made during the entity update. The entity type and entity ID for which an audit event is created are added corresponding to the audit event in the **C1_AUDIT_EVENT** table. For example, if the audit event is created while adding or updating a pricing rule, then the entity type is set to **Pricing Rule** and entity ID is set to the pricing rule ID. In addition, an effective date is stamped corresponding to the audit event in the **C1_AUDIT_EVENT** table. Note that if the entity has a start date, then the effective date is set to the entity's start date. But, if the entity does not have a start date, then the effective date is set to the system date.

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At a time, you can have only two audit events for the entity in the **Pending** status - one audit event which is created during the **Add** action and another audit event which is created during the **Update** action.

Note: Before creating an audit event, the system checks whether an audit event for the entity ID with the same effective date already exists in the **Pending** or **Error** status for the respective action. If so, the system does not create a new audit event for the entity. Instead, the system adds a new log entry in the existing audit event.

Audit Event Processing

On executing the **Audit Event Processing (C1-AUDEV)** batch, the system checks whether there are any audit events in the **Pending** status. If there is an audit event in the **Pending** status, the system checks whether an algorithm is attached to the **Audit Event Processing** system event of the respective audit event type. If an algorithm is not attached to the **Audit Event Processing** system event of the respective audit event type, the status of the audit event is set to **Complete**.

However, if an algorithm is attached to the **Audit Event Processing** system event of the respective audit event type, the system executes the algorithm and accordingly changes the status of the audit event to **Complete**. For example, while processing the audit events of the **C1-PricingRuleTierBased** and **C1-PricingRuleAgeBased** business objects, the system checks whether an algorithm is attached to the **Audit Event Processing** system event of the respective audit event type. If the **C1-AUDEVMPR** algorithm is attached to the audit event type, the system identifies the policy plan where the pricing rule is defined. Once the policy plan is identified, it extracts a list of membership defined on the policy plan and the pricing rule type using which the pricing rule is created. Then, the system creates an entry for each membership, pricing rule type, and effective date combination in the **CI_REPRC_ENTITY_DTL** table. The status of these entries is set to **P**. Finally, the status of the audit event is set to **Complete**.

If any error occurs, the status of the audit event is set to **Error**. The system enables you to either reprocess or cancel the audit events which are in the **Error** status. On canceling an audit event, the status of the audit event is changed to **Canceled**.

For more information about the **Audit Event Processing (C1-AUDEV)** batch and its parameters, see *Oracle Revenue Management and Billing Batch Guide*.

Algorithms Used in the Entity Audit Process

The following table lists the algorithms which are designed to implement the entity audit process:

Algorithm	Algorithm Type	Attached To	System Event	Algorithm Description
C1-REAUDEVNT	C1-REAUDEVNT	Entity Business Object	Audit	Refer to C1-REAUDEVNT on page 3762.
C1-AUDEVMPR	C1-AUDEVMPR	Audit Event Type of the **C1-PricingRuleAgeBased** and **C1-PricingRuleTierBased** business objects	Audit Event Processing	Refer to C1-AUDEVMPR on page 3763.

C1-REAUDEVNT

If this algorithm is attached to the **Audit** system event of a business object, it is invoked whenever you define, edit, or delete the respective entity. It checks whether an active audit event type exists for the entity business object. If so, it considers the active audit event type and creates the audit event using the respective audit event type. The system creates the audit event while:

- Defining an entity when the **Add Action** option is selected in the audit event type

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- Editing an entity when the **Update All** option is selected in the audit event type or when the updated element is listed in the **Audit Elements for Entity Update** section
- Deleting an entity when the **Delete Action** option is selected in the audit event type

The entity type and entity ID for which an audit event is created are added corresponding to the audit event in the **C1_AUDIT_EVENT** table. In addition, the effective date is stamped corresponding to the audit event in the **C1_AUDIT_EVENT** table. Note that if the entity has a start date, then the effective date is set to the entity's start date. But, if the entity does not have a start date, then the effective date is set to the system date.

Note: Before creating an audit event, the system checks whether an audit event for the entity ID with the same effective date already exists in the **Pending** or **Error** status for the respective action. If so, the system does not create a new audit event for the entity. Instead, the system adds a new log entry in the existing audit event.

At present, this algorithm is designed to work with the following business objects:

- C1-POLICY
- C1-ASOPolicy
- C1-Membership
- C1-PolicyPlan
- C1_PERSON_BO
- C1-PricingRuleTierBased
- C1-PricingRuleAgeBased

If you want to use the audit algorithm for the business objects which are not listed above, you need to create a custom audit algorithm.

It contains the following parameters:

- **Audit Event Business Object** - Used to specify the business object using which you want to create the audit event.
- **Audit Event Pending Status** - Used to specify the status in which you want to create the audit event. This parameter is also used for determining whether an audit event for the entity ID already exists in the system.
- **Audit Event Error Status** - Used to specify the status in which an audit event is transitioned when an error occurs while processing the audit event. This parameter is used for determining whether an audit event for the entity ID already exists in the system.

All the above parameters are mandatory.

C1-AUDEVMPR

You must attach this algorithm to the **Audit Event Processing** system event while creating an audit event type for the **C1-PricingRuleAgeBased** and **C1-PricingRuleTierBased** business objects.

This algorithm is invoked when the **Audit Event Processing (C1-AUDEV)** batch is executed. If this algorithm is attached to the **Audit Event Processing** system event of the respective audit event type, the system identifies the policy plan where the pricing rule is defined. Once the policy plan is identified, it extracts a list of membership defined on the policy plan and the pricing rule type using which the pricing rule is created. Then, the system creates an entry for each membership, pricing rule type, and effective date combination in the **CI_REPRC_ENTITY_DTL** table. The status of these entries is set to **P** in the **CI_REPRC_ENTITY_DTL** table.

Audit Event Type

Oracle Revenue Management and Billing enables you to define an audit event type for an entity business object. However, at a time, only one audit event type of the entity business object can be in the **Active** status. The system creates an audit event using the active audit event type whenever you define, edit, or delete the respective entity. The audit event type helps the system to determine:

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- **Entity Business Object** - The business object for which you want to define the audit event type.
- **Audit Usage** - The usage indicates the purpose of auditing an entity which is created using the entity business object. For example, membership premium charges might change due to change in pricing and therefore you may want to audit the pricing rules for premium calculation.
- **Audit Actions** - The various options, such as **Add Action**, **Delete Action**, and **Update All** are available while defining an audit event type. The system creates an audit event while defining, editing or deleting an entity depending on whether the respective option is selected in the audit event type. For example, if you create the active audit event types for the following entity business objects where the below listed options are selected:

Audit Event Type	Entity Business Object	Add Action	Update All	Delete Action
AETY1	C1-POLICY	Y	N	N
AETY2	C1-ASOPolicy	Y	Y	Y

  Then, the system will create an audit event using the **AETY1** audit event type when you define a fully-insured group policy. But, the system will not create an audit event when you edit or delete a fully-insured group policy. However, the system will create an audit event using the **AETY2** audit event type when you define, edit, or delete a self-funded policy.
- **Audit Elements During Update** - Alternatively, you can list the elements of the entity business object which should be monitored for the auditing purpose while editing an entity in the audit event type. You can list the elements of the entity business object when the **Update All** option is not selected. The system enables you to monitor a set of the business object statuses, characteristic types, and fields and accordingly creates an audit event while editing an entity. For example, if you create the audit event types for the following entity business objects:

Audit Event Type	Entity Business Object	Update All	Audit Elements During Update
AETY3	C1_PERSON_BO	Y	Not applicable
AETY4	C1-PricingRuleTierBased	N	Pricing Start Date, Rate Option, Base Fee for a Price Component
AETY5	C1-PricingRuleAgeBased	N	Rate Option, Base Fee for a Price Component

  Then, the system will create an audit event using the **AETY3** audit event type when you edit any details of a person. But, the system will create an audit event using the **AETY4** audit event type when the following fields in a tier based pricing rule are edited:

  - Pricing Start Date
  - Rate Option
  - Base Fee for a Price Component

  Similarly, the system will create an audit event using the **AETY5** audit event type when the following fields in an age based pricing rule are edited:

  - Rate Option
  - Base Fee for a Price Component

The **Audit Event Type** screen allows you to define, edit, copy, and delete an audit event type. It contains the following zones:

- Audit Event Type List on page 3765
- Audit Event Type on page 3766

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Audit Event Type List

The **Audit Event Type List** zone lists the audit event types that are already defined in the system. It contains the following columns:

Column Name	Column Description
Audit Event Type	Displays the audit event type.
Description	Displays the description of the audit event type.
Entity Business Object	Indicates the business object for which the audit event type is created. In addition, this column has a context menu which helps in navigating to other screens in the application. **Note:** It has a link. On clicking the link, the **Business Object** screen appears where you can view the details of the respective business object.
Status	Indicates the status of the audit event type. The valid values are: • Active • Inactive
Audit Usage	Indicates the purpose of auditing an entity which is created using the entity business object. The valid values are: • **Disaggregation/Reseeding** - Used when you want to audit an entity for which the system should automatically create disaggregation or reseeding request. • **Premium Calculation** - Used when you want to audit an entity which has an impact on membership premium calculation.
Edit	On clicking the **Edit** (✎) icon, the **Audit Event Type** screen appears where you can edit the details of the audit event type. **Note:** You can edit an audit event type when an audit event is not yet created using the audit event type. However, if an audit event is created using the audit event type, you can only do the following: • Change the status from **Active** to **Inactive** and vice-versa • Attach algorithms (if required) to the audit event type • Define, edit, or remove characteristics of the audit event type
Duplicate	On clicking the **Duplicate** (⧉) icon, the **Audit Event Type** screen appears where you can define a new audit event type using an existing audit event type.
Delete	On clicking the **Delete** (🗑) icon, you can delete the audit event type. **Note:** You can delete an audit event type when an audit event is not yet created using the audit event type.

Note: Pagination is used to display limited number of records in this zone. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

You can filter the list using various search criteria (such as, **Status** and **Entity Business Object**) available in the **Filter** area. By default, the **Filter** area is hidden. You can view the **Filter** area by clicking the **Filters** (▽) icon in the upper right corner of this zone.

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On clicking the **Broadcast** (((•))) icon corresponding to an audit event type, the **Audit Event Type** zone appears with the details of the respective audit event type.

Related Topics

For more information on...	See...
How to edit an audit event type	Editing an Audit Event Type on page 3775
How to copy an audit event type	Copying an Audit Event Type on page 3778
How to delete an audit event type	Deleting an Audit Event Type on page 3780
How to view the details of an audit event type	Viewing the Audit Event Type Details on page 3781

Audit Event Type

The **Audit Event Type** zone displays the details of the audit event type. It contains the following sections:

- **Main** - Displays basic information about the audit event type. It contains the following fields:

Field Name	Field Description
Audit Event Type	Displays the audit event type.
Description	Displays the description of the audit event type.
Detailed Description	Displays additional information about the audit event type.
Status	Indicates the status of the audit event type. The valid values are: • Active • Inactive
Entity Business Object	Indicates the business object for which the audit event type is defined. In addition, this field has a context menu which helps in navigating to other screens in the application. **Note:** It has a link. On clicking the link, the **Business Object** screen appears where you can view the details of the respective business object.
Audit Usage	Indicates the purpose of auditing an entity which is created using the entity business object. The valid values are: • **Premium Calculation** - Used when you want to audit an entity which has an impact on membership premium calculation. • **Disaggregation/Reseeding** - Used when you want to audit an entity for which the system should automatically create disaggregation or reseeding request.
Update All	Indicates whether an audit event must be created whenever any field, characteristic, or status of the entity is updated.
Add Action	Indicates whether an audit event must be created whenever an entity is added.
Delete Action	Indicate whether an audit event must be created whenever an entity is deleted.

- **Algorithms** - Lists the algorithms associated with the audit event type. It contains the following columns:

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Column Name	Column Description
System Event	Indicates the system event when the algorithm must be triggered. The valid value is: • Audit Event Processing
Sequence	Indicates the order in which the algorithms with the same system event must be triggered.
Algorithm	Indicates the algorithm attached to the system event. **Note:** It has a link. On clicking the link, the **Algorithm** screen appears where you can view the details of the respective algorithm.

- **Audit Elements for Entity Update** - Lists the elements which must be monitored for auditing while updating the entity. It contains the following columns:

Column Name	Column Description
Element Type	Indicates the type of element. The valid values are: • Business Object Status • Characteristic • Field
Element Name	Displays the element which must be monitored for auditing. **Note:** If the element is a part of a group or list, the system displays the element name along with the element group and/or list. For example, if you select the **policyPerRole** element of the **C1-ASOPolicy** business object, the system displays the `policyPersons/policyPerRole` in the **Element Name** field. Here, the **policyPersons** is the element list.
Element Value	The following table lists the element value depending on the element type: **Element Type** / **Element Value** Business Object Status: Indicates the status of the entity business object which must be monitored for auditing. Characteristic: Indicates the characteristic type which must be monitored for auditing. **Note:** The data does not appear in this column when the element type is set to **Field**.

- **Characteristics** - Lists the characteristics which are defined for the audit event type. It contains the following columns:

Column Name	Column Description
Characteristic Type	Indicates the characteristic type.
Characteristic Value	Displays the value of the characteristic type.

- **Record Actions** - This section contains the following buttons:

Button Name	Button Description
Edit	Used to edit the details of the audit event type.

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Button Name	Button Description
	Note: You can edit an audit event type when an audit event is not yet created using the audit event type. However, if an audit event is created using the audit event type, you can only do the following: • Change the status from **Active** to **Inactive** and vice-versa • Attach algorithms (if required) to the audit event type • Define, edit, or remove characteristics of the audit event type
Delete	Used to delete the audit event type.
	Note: You can delete an audit event type when an audit event is not yet created using the audit event type.
Duplicate	Used to create a new audit event type using an existing audit event type.

- **Record Information** - This section contains the following field:

Field Name	Field Description
Business Object	Indicates the business object using which the audit event type is created. In addition, a context menu appears corresponding to this field which helps in navigating to other screens in the application.
	Note: It has a link. On clicking the link, the **Business Object** screen appears where you can view the details of the respective business object.

By default, the **Audit Event Type** zone does not appear in the **Audit Event Type** screen. It appears when you click the **Broadcast** (📡) icon corresponding to an audit event type in the **Audit Event Type List** zone.

Related Topics

For more information on...	See...
How to edit an audit event type	Editing an Audit Event Type on page 3775
How to copy an audit event type	Copying an Audit Event Type on page 3778
How to delete an audit event type	Deleting an Audit Event Type on page 3780
How to view the details of an audit event type	Viewing the Audit Event Type Details on page 3781

Defining an Audit Event Type

Prerequisites

To define an audit event type, you should have:

- Entity business objects defined in the application
- The **Eligible for Audit Event** option type of the entity business object (for which you want to define an audit event type) set to **Y**

> **Note:** The **Eligible for Audit Event** option type is available for the entity business object when the **Valid BO Option Type** option type of the respective maintenance object is set to **C1AT**.

- Values defined for the **AUDIT_USAGE_FLG** lookup field

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Procedure

To define an audit event type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **A** and then click **Audit Event Type**.
   A sub-menu appears.
3. Click the **Add** option from the **Audit Event Type** sub-menu.

   The **Audit Event Type** screen appears. It contains the following sections:

   - **Main** - Used to specify basic information about the audit event type.
   - **Algorithms** - Used to associate algorithms with the audit event type.
   - **Audit Elements for Entity Update** - Used to list the elements from the entity business object which you want to monitor for auditing while updating the entity.

     Note: The **Audit Elements for Entity Update** section is enabled only when the **Update All** option is not selected in the **Main** section.
   - **Characteristics** - Used to define the characteristics for the audit event type.

   The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Audit Event Type	Used to specify the audit event type. **Note:** You cannot specify any special characters except hyphen and underscore in the audit event type.	Yes
Business Object	Indicates the business object using which you are defining the audit event type.	Not applicable
Description	Used to specify the description for the audit event type.	Yes
Detailed Description	Used to specify additional information about the audit event type.	No
Status	Used to indicate the status of the audit event type. The valid values are: • Active • Inactive **Note:** You can create only one audit event type in the **Active** status for an entity business object.	Yes
Entity Business Object	Used to indicate the business object for which you want to define the audit event type. **Note:** The list includes only those business objects where the **Eligible for Audit Event** option type is set to **Y**.	Yes
Audit Usage	Used to indicate the purpose of auditing an entity which is created using the entity business object. The valid values are: • **Disaggregation/Reseeding** - Used when you want to audit an entity for which the system should	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	automatically create disaggregation or reseeding request. • **Premium Calculation** - Used when you want to audit an entity which has an impact on membership premium calculation.	
Update All	Used to indicate whether you want to create an audit event whenever any field, characteristic, or status of the entity is updated.	No
Add Action	Used to indicate whether you want to create an audit event whenever the entity is added.	Yes (Conditional) **Note:** This field is required when you want to create an audit event while adding the entity.
Delete Action	Used to indicate whether you want to create an audit event whenever the entity is deleted.	Yes (Conditional) **Note:** This field is required when you want to create an audit event while deleting the entity.

Tip: Alternatively, you can access this screen by clicking the **Add** button in the **Page Title** area of the **Audit Event Type** screen.

4. Enter the required details in the **Main** section.
5. Associate the required algorithms with the audit event type.
6. Add elements (such as, field, characteristic, or status) which you want to monitor for auditing while updating the entity.

Note: You can list the elements for auditing when the **Update All** option is not selected in the **Main** section.

7. Define characteristics for the audit event type, if required.
8. Click **Save**.
   The audit event type is defined.

Related Topics

For more information on...	See...
Audit Event Type screen	Audit Event Type on page 3763
How to associate an algorithm with an audit event type	Associating an Algorithm with an Audit Event Type on page 3771
How to add an element for auditing in an audit event type	Adding an Element for Auditing in an Audit Event Type on page 3772
How to define a characteristic for an audit event type	Defining a Characteristic for an Audit Event Type on page 3774

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Associating an Algorithm with an Audit Event Type

Prerequisites

To associate an algorithm with an audit event type, you should have:

- Algorithms defined in the application (which are created using an algorithm type where the algorithm entity is set to **Audit Event Processing**)

> **Note:** The **C1-AUDEVMPR** algorithm type is shipped with the product. You must attach an algorithm created using the **C1-AUDEVMPR** algorithm type to the audit event types which are defined for the **C1-PricingRuleTierBased** and **C1-PricingRuleAgeBased** business objects.

Procedure

To associate an algorithm with an audit event type:

1. Ensure that the **Algorithms** section is expanded when you are defining, editing, or copying an audit event type.

   The **Algorithms** section contains the following fields in a grid:

Field Name	Field Description	Mandatory (Yes or No)
System Event	Used to indicate the system event when you want to trigger the algorithm. The valid value is: • **Audit Event Processing** - Used when you want to trigger the attached algorithm while executing the **Audit Event Process Monitor (C1-AUDEV)** batch.	Yes (Conditional) **Note:** This field is required when you are associating an algorithm with the audit event type.
Sequence	Used to indicate the order in which the algorithms with the same system event should be triggered.	Yes (Conditional) **Note:** This field is required when you are associating an algorithm with the audit event type.
Algorithm	Used to indicate the algorithm that you want to attach to the system event. **Note:** Once you select the system event, the **Search** (🔍) icon appears corresponding to the **Algorithm** field. On clicking the **Search** icon, the **Algorithm Search** window appears. On specifying the algorithm, the description of the algorithm appears corresponding to the **Algorithm** field.	Yes (Conditional) **Note:** This field is required when you are associating an algorithm with the audit event type.

2. Enter the required details in the **Algorithms** section.
3. If you want to associate more than one algorithm with the audit event type, click the **Add** (+) icon, and then *r*epeat step 2.

> **Note:** However, if you want to remove an algorithm from the audit event type, click the **Delete** (🗑) icon corresponding to the algorithm.

Related Topics

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For more information on...	See...
How to define an audit event type	Defining an Audit Event Type on page 3768
How to edit an audit event type	Editing an Audit Event Type on page 3775
How to copy an audit event type	Copying an Audit Event Type on page 3778

Adding an Element for Auditing in an Audit Event Type

Prerequisites

To add an element for auditing in an audit event type, you should have:

- Required elements defined in the entity business object schema
- Required statuses defined in the lifecycle of the entity business object
- Required characteristic types defined in the application (where the characteristic entity is set to the respective entity)

Procedure

To add an element for auditing in an audit event type:

1. Ensure that the **Audit Elements for Entity Update** section is expanded when you are defining, editing, *or* copying an audit event type.

   The **Audit Elements for Entity Update** section contains the following fields in a grid:

<table>
<tr><th>Field Name</th><th>Field Description</th><th>Mandatory (Yes or No)</th></tr>
<tr><td>Element Type</td><td>Used to indicate the type of element. The valid values are:
Business Object Status
Characteristic
Field</td><td>Yes (Conditional)
Note: This field is required when you want to create an audit event whenever the specified element is updated.</td></tr>
<tr><td>Element Name</td><td>Used to specify the element which you want to monitor while updating the entity. The following table lists the elements which you must select for the respective element type:<table><tr><th>Element Type</th><th>Element Name</th></tr><tr><td>Business Object Status</td><td>boStatus</td></tr><tr><td>Characteristic</td><td>characteristics/characteristicsList/characteristicType</td></tr><tr><td>Field</td><td>Any field from the entity business object schema</td></tr></table></td><td>Yes (Conditional)
Note: This field is required when you want to create an audit event whenever the specified element is updated.</td></tr>
</table>

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<table>
<tr><th>Field Name</th><th>Field Description</th><th>Mandatory (Yes or No)</th></tr>
<tr><td></td><td>
<table>
<tr><th>Element Type</th><th>Element Name</th></tr>
<tr><td></td><td>Note:
Here, you must not specify a element whose type is set to group or list.
If the element is a part of a group or list, the system displays the element name along with the element group and/or list. For example, if you select the policyPerRole element of the C1-ASOPolicy business object, the system displays the <code>policyPersons/policyPerRole</code> in the Element Name field. Here, the policyPersons is the element list.</td></tr>
</table>
</td><td></td></tr>
<tr><td></td><td>Note:
The Search (🔍) icon appears corresponding to the Element Name field. On clicking the Search icon, the Schema window appears.
The Schema window does not appear when the entity business object is not specified in the Main section.</td><td></td></tr>
<tr><td>Element Value</td><td>Used to specify the element value depending on the element type. The following table lists the element value that you must specify depending on the element type:
<table>
<tr><th>Element Type</th><th>Element Value</th></tr>
<tr><td>Business Object Status</td><td>Used to indicate the status of the entity business object which you want to monitor for auditing. The system then creates an audit event whenever the entity is transitioned to the specified status.</td></tr>
<tr><td>Characteristic</td><td>Used to indicate the characteristic type which you want to monitor for auditing. Here, you must specify a characteristic type where the characteristic entity is set to the respective entity. The system then creates an audit event whenever the specified characteristic is defined, edited, or removed from the entity.</td></tr>
</table>
</td><td>Yes (Conditional)
Note: This field is required when you want to create an audit event whenever the specified element is updated.</td></tr>
</table>

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Field Name	Field Description		Mandatory (Yes or No)
	Element Type	**Element Value**	
		Note: The **Search** (🔍) icon appears corresponding to the **Element Value** field. On clicking the **Search** icon, the **Characteristic Type Search** window appears.	
	Note: This field does not appear when the **Field** option is selected from the **Element Type** list.		

Note: The **Audit Elements for Entity Update** section is enabled when the **Update All** option is not selected in the **Main** section.

2. Enter the required details in the **Audit Elements for Entity Update** section.
3. If you want to add more than one element for auditing in the audit event type, click the **Add** (+) icon and then *r*epeat step 2.

Note: However, if you want to remove an element from the audit event type, click the **Delete** (🗑) icon corresponding to the element.

Related Topics

For more information on...	See...
How to define an audit event type	Defining an Audit Event Type on page 3768
How to edit an audit event type	Editing an Audit Event Type on page 3775
How to copy an audit event type	Copying an Audit Event Type on page 3778

Defining a Characteristic for an Audit Event Type

Prerequisites

To define a characteristic for an audit event type, you should have:

- Characteristic types defined in the application (where the characteristic entity is set to **Audit Event Type**)

Procedure

To define a characteristic for an audit event type:

1. Ensure that the **Characteristics** section is expanded when you are defining, editing, or copying an audit *e*vent type.

   The **Characteristics** section contains the following fields in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Characteristic Type	Used to indicate the characteristic type.	Yes (Conditional)
	Note: The list includes only those characteristic types where the characteristic entity is set to **Audit Event Type**.	**Note:** This field is required when you are defining a characteristic for the audit event type.

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Field Name	Field Description	Mandatory (Yes or No)
Characteristic Value	Used to specify the value for the characteristic type.	Yes (Conditional)
	Note: If you select a predefined characteristic type, the **Search** (🔍) icon appears corresponding to the **Characteristic Value** field. On clicking the **Search** icon, the **Predefined Characteristic Search** window appears where you can search for a predefined characteristic value. On specifying the value for a predefined characteristic type, the description of the characteristic value appears corresponding to the **Characteristic Value** field.	**Note:** This field is required when you are defining a characteristic for the audit event type.

2. Enter the required details in the **Characteristics** section.
3. If you want to define more than one characteristic for the audit event type, click the **Add** (+) icon, and then *r*epeat step 2.

Note: However, if you want to remove a characteristic from the audit event type, click the **Delete** (🗑) icon corresponding to the characteristic.

Related Topics

For more information on...	See...
How to define an audit event type	Defining an Audit Event Type on page 3768
How to edit an audit event type	Editing an Audit Event Type on page 3775
How to copy an audit event type	Copying an Audit Event Type on page 3778

Editing an Audit Event Type

You can edit an audit event type when an audit event is not yet created using the audit event type. However, if an audit event is created using the audit event type, you can only do the following:

- Change the status from **Active** to **Inactive** and vice-versa
- Attach algorithms (if required) to the audit event type
- Define, edit, or remove characteristics of the audit event type

Prerequisites

To edit an audit event type, you should have:

- Values defined for the **AUDIT_USAGE_FLG** lookup field

Procedure

To edit an audit event type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **A** and then click **Audit Event Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Audit Event Type** sub-menu.
   The **Audit Event Type** screen appears.

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4. In the **Audit Event Type List** zone, click the **Edit** (✎) icon in the **Edit** column corresponding to the audit *e*vent type whose details you want to edit.

   The **Audit Event Type** screen appears. It contains the following sections:

   - **Main** - Used to specify basic information about the audit event type.
   - **Algorithms** - Used to associate algorithms with the audit event type.
   - **Audit Elements for Entity Update** - Used to list the elements from the entity business object which you want to monitor for auditing while updating the entity.

     Note: The **Audit Elements for Entity Update** section is enabled only when the **Update All** option is not selected in the **Main** section.

   - **Characteristics** - Used to define the characteristics for the audit event type.

   The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Audit Event Type	Displays the audit event type.	Not applicable
Business Object	Indicates the business object which is used while defining the audit event type.	Not applicable
Description	Used to specify the description for the audit event type.	Yes
Detailed Description	Used to specify additional information about the audit event type.	No
Status	Used to indicate the status of the audit event type. The valid values are: • Active • Inactive **Note:** You can create only one audit event type in the **Active** status for an entity business object.	Yes
Entity Business Object	Indicates the business object for which the audit event type is defined.	Not applicable
Audit Usage	Used to indicate the purpose of auditing an entity which is created using the entity business object. The valid values are: • **Premium Calculation** - Used when you want to audit an entity which has an impact on membership premium calculation. • **Disaggregation/Reseeding** - Used when you want to audit an entity for which the system should automatically create disaggregation or reseeding request.	Yes
Update All	Used to indicate whether you want to create an audit event whenever any field, characteristic, or status of the entity is updated.	No
Add Action	Used to indicate whether you want to create an audit event whenever the entity is added.	Yes (Conditional)

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Field Name	Field Description	Mandatory (Yes or No)
		Note: This field is required when you want to create an audit event while adding the entity.
Delete Action	Used to indicate whether you want to create an audit event whenever the entity is deleted.	Yes (Conditional) **Note:** This field is required when you want to create an audit event while deleting the entity.

Tip: Alternatively, you can access this screen by clicking the **Edit** button in the **Audit Event Type** zone.

5. Modify the required details in the **Main** section.
6. Associate or disassociate the required algorithms from the audit event type.

Note: If an audit event is created using the audit event type, you cannot edit or remove algorithms from the audit event type. In such case, you can only associate additional algorithms with the audit event type.

7. Add, edit, or remove elements from the audit event type, if required.

Note:

The **Audit Elements for Entity Update** section is enabled when the **Update All** option is not selected in the **Main** section.

You cannot add, edit, or remove elements from the **Audit Elements for Entity Update** section when an audit event is already created using the audit event type.

8. Define, edit, or remove characteristics of the audit event type, if required.

Note: You cannot define, edit, or remove characteristics of the **Characteristics** section when an audit event is already created using the audit event type.

9. Click **Save**.
   The changes made to the audit event type are saved.

Related Topics

For more information on...	See...
Audit Event Type screen	Audit Event Type on page 3763
Audit Event Type List zone	Audit Event Type List on page 3765
Audit Event Type zone	Audit Event Type on page 3766
How to associate an algorithm with an audit event type	Associating an Algorithm with an Audit Event Type on page 3771
How to add an element for auditing in an audit event type	Adding an Element for Auditing in an Audit Event Type on page 3772
How to define a characteristic for an audit event type	Defining a Characteristic for an Audit Event Type on page 3774

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Copying an Audit Event Type

Instead of creating an audit event type from scratch, you can create a new audit event type using an existing audit event type. This is possible through copying an audit event type. On copying an audit event type, the details including the algorithms, audit elements, and characteristics are copied to the new audit event type. You can then edit the details, if required.

Prerequisites

To copy an audit event type, you should have:

- Audit event type (whose copy you want to create) defined in the application
- Entity business objects defined in the application
- The **Eligible for Audit Event** option type of the entity business object (for which you want to define an audit event type) set to **Y**

> **Note:** The **Eligible for Audit Event** option type is available for the entity business object when the **Valid BO Option Type** option type of the respective maintenance object is set to **C1AT**.

- Values defined for the **AUDIT_USAGE_FLG** lookup field

Procedure

To copy an audit event type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **A** and then click **Audit Event Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Audit Event Type** sub-menu.
   The **Audit Event Type** screen appears.
4. In the **Audit Event Type List** zone, click the **Duplicate** (⧉) icon in the **Duplicate** column corresponding to the *a*udit event type whose copy you want to create.

   The **Audit Event Type** screen appears. It contains the following sections:

   - **Main** - Used to specify basic information about the audit event type.
   - **Algorithms** - Used to associate algorithms with the audit event type.
   - **Audit Elements for Entity Update** - Used to list the elements from the entity business object which you want to monitor for auditing while updating the entity.

     > **Note:** The **Audit Elements for Entity Update** section is enabled only when the **Update All** option is not selected in the **Main** section.

   - **Characteristics** - Used to define the characteristics for the audit event type.

   The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Audit Event Type	Used to specify the audit event type. **Note:** You cannot specify any special characters except hyphen and underscore in the audit event type.	Yes
Business Object	Indicates the business object which is used while defining the audit event type.	Not applicable

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Field Name	Field Description	Mandatory (Yes or No)
Description	Used to specify the description for the audit event type.	Yes
Detailed Description	Used to specify additional information about the audit event type.	No
Status	Used to indicate the status of the audit event type. The valid values are: • Active • Inactive **Note:** You can create only one audit event type in the **Active** status for an entity business object.	Yes
Entity Business Object	Used to indicate the business object for which you want to define the audit event type. **Note:** The list includes only those business objects where the **Eligible for Audit Event** option type is set to **Y**.	Yes
Audit Usage	Used to indicate the purpose of auditing an entity which is created using the entity business object. The valid values are: • **Premium Calculation** - Used when you want to audit an entity which has an impact on membership premium calculation. • **Disaggregation/Reseeding** - Used when you want to audit an entity for which the system should automatically create disaggregation or reseeding request.	Yes
Update All	Used to indicate whether you want to create an audit event whenever any field, characteristic, or status of the entity is updated.	No
Add Action	Used to indicate whether you want to create an audit event whenever the entity is added.	Yes (Conditional) **Note:** This field is required when you want to create an audit event while adding the entity.
Delete Action	Used to indicate whether you want to create an audit event whenever the entity is deleted.	Yes (Conditional) **Note:** This field is required when you want to create an audit event while deleting the entity.

Tip: Alternatively, you can copy an audit event type by clicking the **Duplicate** button in the **Audit Event Type** zone.

5. Enter the required details in the **Main** section.
6. Associate or disassociate the required algorithms from the audit event type.
7. Add, edit, or remove elements from the audit event type, if required.

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> **Note:** The **Audit Elements for Entity Update** section is enabled when the **Update All** option is not selected in the **Main** section.

8. Define, edit, or remove characteristics of the audit event type, if required.
9. Click **Save**.
   The new audit event type is defined.

Related Topics

For more information on...	See...
Audit Event Type screen	Audit Event Type on page 3763
Audit Event Type List zone	Audit Event Type List on page 3765
Audit Event Type zone	Audit Event Type on page 3766
How to associate an algorithm with an audit event type	Associating an Algorithm with an Audit Event Type on page 3771
How to add an element for auditing in an audit event type	Adding an Element for Auditing in an Audit Event Type on page 3772
How to define a characteristic for an audit event type	Defining a Characteristic for an Audit Event Type on page 3774

Deleting an Audit Event Type

Procedure

To delete an audit event type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **A** and then click **Audit Event Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Audit Event Type** sub-menu.
   The **Audit Event Type** screen appears.
4. In the **Audit Event Type List** zone, click the **Delete** (🗑) icon in the **Delete** column corresponding to the audit *e*vent type that you want to delete.

   A message appears confirming whether you want to delete the audit event type.

   > **Note:** You can delete an audit event type when an audit event is not yet created using the audit event type.

   > **Tip:** Alternatively, you can delete an audit event type by clicking the **Delete** button in the **Audit Event Type** zone.
5. Click **OK**.
   The audit event type is deleted.

Related Topics

For more information on...	See...
Audit Event Type screen	Audit Event Type on page 3763
Audit Event Type List zone	Audit Event Type List on page 3765
Audit Event Type zone	Audit Event Type on page 3766

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Viewing the Audit Event Type Details

Procedure

To view the details of an audit event type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **A** and then click **Audit Event Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Audit Event Type** sub-menu.
   The **Audit Event Type** screen appears.
4. In the **Audit Event Type List** zone, click the **Broadcast** (ᯤ) icon corresponding to the audit event type *w*hose details you want to view.
   The **Audit Event Type** zone appears.
5. View the details of the audit event type in the **Audit Event Type** zone.

Related Topics

For more information on...	See...
Audit Event Type screen	Audit Event Type on page 3763
Audit Event Type List zone	Audit Event Type List on page 3765
Audit Event Type zone	Audit Event Type on page 3766

Audit Event (Used for Searching)

The **Audit Event** screen allows you to search for an audit event using various search criteria. It contains the following zone:

- Search Audit Event on page 3781

Through this screen, you can navigate to the following screen:

- Audit Event (Used for Viewing) on page 3786

Related Topics

For more information on...	See...
How to search for an audit event	Searching for an Audit Event on page 3784
How to view the details of an audit event	Viewing the Audit Event Details on page 3785

Search Audit Event

The **Search Audit Event** zone allows you to search for an audit event using various search criteria. It contains the following two sections:

- **Search Criteria** - The **Search Criteria** section contains the following fields:

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Field Name	Field Description	Mandatory (Yes or No)
Search By	Used to indicate whether you want to search for an audit event using the entity or audit event details. The valid values are: • Entity Details • Audit Event Details **Note:** By default, the **Entity Details** option is selected.	Yes
Entity	Used to search audit events which are created for a particular entity business object. **Note:** This field appears when the **Entity Details** option is selected from the **Search By** list. The list includes only those entity business objects where the **Eligible for Audit Event** option type is set to **Y**.	No
Created From	Used to search audit events which are created from a particular date onwards.	No
Created To	Used to search audit events which are created till a particular date.	No
Entity ID	Used to search audit events which are created for a particular entity. **Note:** This field appears when the following conditions are met: • The **Entity Details** option is selected from the **Search By** list. • The entity business object is selected from the **Entity** list. You can search for an audit event by clicking the **Search** (🔍) icon corresponding to the field.	No
Status	Used to search audit events with a particular status. The valid values are: • Canceled • Complete • Error • Pending	No

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Field Name	Field Description	Mandatory (Yes or No)
	Note: This field appears in the search criteria by default, when the **Audit Event Details** option is selected from the **Search By** list. In case you choose the **Entity Details** option, this field appears only when the entity business object is selected from the **Entity** list.	
From Effective Date	Used to search audit events whose effective date is equal to or later than the specified date. **Note:** This field appears only when you choose the **Entity Details** option from the **Search By** list and entity business object from the **Entity** list.	No
To Effective Date	Used to search audit events whose effective date is equal to or earlier than the specified date. **Note:** This field appears only when you choose the **Entity Details** option from the **Search By** list and entity business object from the **Entity** list.	No
Audit Event ID	Used to search a particular audit event. **Note:** This field appears when the **Audit Event Details** option is selected from the **Search By** list.	No
Audit Event Type	Used to search audit events which are created using a particular audit event type. **Note:** This field appears when the **Audit Event Details** option is selected from the **Search By** list.	No
Audit Action	Used to search audit events which are created while adding, updating, or deleting an entity. The valid values are: • Add Row • Change Row • Delete Row **Note:** This field appears when the **Audit Event Details** option is selected from the **Search By** list.	No

Note: You must specify at least one search criterion while searching for an audit event.

- **Search Results** - On clicking the **Search** button, the search results appear based on the specified search criteria. The **Search Results** section contains the following columns:

Column Name	Column Description
Creation Date Time	Displays the date and time when the audit event is created.

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Column Name	Column Description
Audit Event Information	Displays information about the audit event. **Note:** It has a link. On clicking the link, the **Audit Event** screen appears where you can view the details of the respective audit event.
Entity ID	Indicates the entity for which the audit event is created.
Entity	Indicates the entity business object for which the audit event is created.
Effective Date	Displays the effective date which is stamped corresponding to the audit event. **Note:** The effective date is used later to derive the timeline for premium calculation.
Status	Indicates the status of the audit event. The valid values are: • Canceled • Complete • Error • Pending
Audit Action	Indicates the action due to which the audit event is created for the entity. The valid values are: • Add Row • Change Row • Delete Row
Pricing Requested	Indicates whether the repricing entity detail records are created for the audit event. The valid values are: • Yes • No **Note:** It has a link. On clicking the link, if the repricing entity record exist, the **Repricing Request** screen appears where you can view the details of the repricing entity. In case the record does not exist, the system displays a warning message.

Note: Pagination is used to display limited number of records in the **Search Results** section. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

Related Topics

For more information on...	See...
How to search for an audit event	Searching for an Audit Event on page 3784
How to view the details of an audit event	Viewing the Audit Event Details on page 3785

Searching for an Audit Event

Prerequisites

To search for an audit event, you should have:

- Entity business objects defined in the application

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- The **Eligible for Audit Event** option type of the entity business object set to **Y**

> **Note:** The **Eligible for Audit Event** option type is available for the entity business object when the **Valid BO Option Type** option type of the respective maintenance object is set to **C1AT**.

Procedure

To search for an audit event:

1. Click the **Menu** link in the **Application** toolbar.
   A list appears.
2. From the **Main** menu, select **Transaction and Audit Event Management** and then click **Audit Event**.
   The **Audit Event** screen appears.
3. Enter the search criteria in the **Search Audit Event** zone.

> **Note:** ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.

4. Click **Search**.
   A list of audit events that meet the search criteria appears in the **Search Results** section.

Related Topics

For more information on...	See...
Audit Event screen	Audit Event (Used for Searching) on page 3781
Search Audit Event zone	Search Audit Event on page 3781

Viewing the Audit Event Details

Procedure

To view the details of an audit event:

1. Search for the audit event in the **Audit Event** screen.
2. In the **Search Results** section, click the link in the **Audit Event Information** column corresponding to the *a*udit event whose details you want to view.
   The **Audit Event** screen appears.
3. Ensure that the **Main** tab is selected.
4. View the details of the audit event in the **Audit Event** zone.

Related Topics

For more information on...	See...
How to search for an audit event	Searching for an Audit Event on page 3784
Audit Event screen	Audit Event (Used for Viewing) on page 3786
Audit Event zone	Audit Event on page 3786

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Audit Event (Used for Viewing)

The **Audit Event** screen allows you to view the details of an audit event. In addition, it allows you to cancel an audit event which is in the **Error** status. It contains the following tabs:

- Audit Event - Main on page 3786
- Audit Event - Log on page 3787

Related Topics

For more information on...	See...
How to view the details of an audit event	Viewing the Audit Event Details on page 3785
How to cancel an audit event	Canceling an Audit Event on page 3788

Audit Event - Main

The **Main** tab displays information about the audit event. It contains the following zone:

- Audit Event on page 3786

Audit Event

The **Audit Event** zone displays the details of the audit event. It contains the following sections:

- **Main** - Displays basic information about the audit event. It contains the following fields:

Field Name	Field Description
Audit Event Information	Displays information about the audit event.
Audit Event Type	Indicates the audit event type using which the audit event is created. **Note:** It has a link. On clicking the link, the **Audit Event Type** screen appears where you can view the details of the respective audit event type.
Status	Indicates the status of the audit event. The valid values are: • Canceled • Complete • Error • Pending
Entity ID	Indicates the entity for which the audit event is created.
Effective Date	Displays the effective date which is stamped corresponding to the audit event in the **C1_AUDIT_EVENT** table. **Note:** If the entity has a start date, then the effective date is set to the entity's start date. But, if the entity does not have a start date, then the effective date is set to the system date.
Audit Action Flag	Indicates the action due to which the audit event is created for the entity. The valid values are:

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Field Name	Field Description
	• Add Row • Change Row • Delete Row
Maintenance Object	Indicates the maintenance object of the entity business object for which the audit event is created. **Note:** It has a link. On clicking the link, the **Maintenance Object** screen appears where you can view the details of the respective maintenance object.

- **Characteristics** - Lists the characteristics defined for the audit event. It contains the following columns:

Column Name	Column Description
Characteristic Type	Indicates the characteristic type.
Characteristic Value	Displays the value of the characteristic type.

- **Record Actions** - This section contains the following button:

Button Name	Button Description
Cancel	Used to cancel the audit event. **Note:** The **Cancel** button appears when the audit event is in the **Error** status.

- **Record Information** - This section contains the following fields:

Field Name	Field Description
Business Object	Indicates the business object using which the audit event is created. In addition, a context menu appears corresponding to this field which helps in navigating to other screens in the application. **Note:** It has a link. On clicking the link, the **Business Object** screen appears where you can view the details of the respective business object.
Status Date/Time	Displays the date and time when the audit event status is updated.
Create Date/Time	Displays the date and time when the audit event is created.

Related Topics

For more information on...	See...
How to cancel an audit event	Canceling an Audit Event on page 3788

Audit Event - Log

The **Log** tab contains the following zone:

- Audit Event Log on page 3787

Audit Event Log

The **Audit Event Log** zone lists the complete trail of actions performed on the audit event. It contains the following columns:

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Column Name	Column Description
Creation Date Time	Displays the date and time when the action was performed on the audit event.
Details	Displays the details about the action performed on the audit event.
User	Indicates the user who has performed the action on the audit event.
Log type	Indicates the type of log.
Related Object	Indicates the object or entity which is created when the action is performed on the audit event.
	Note: At present, no data appears in this column. The implementation team can build the custom logic to meet the business requirements.
Status Reason	Indicates the reason why the status of the audit event is changed.
	Note: At present, no data appears in this column. The implementation team can build the custom logic to meet the business requirements.

Related Topics

For more information on...	See...
How to view the log of an audit event	Viewing the Log of an Audit Event on page 3789

Canceling an Audit Event

There might be situations when an erroneous audit event is created in the system. In such case, the system provides you with an ability to cancel such audit events. However, note that you can cancel an audit event when the audit event is in the **Error** status.

Prerequisites

To cancel an audit event, you should have:

- Cancel reasons defined in the application

Note: While cancelling an audit event, you need to specify the reason why you want to cancel the audit event. You can select the appropriate cancel reason when you have defined the reasons for the **Canceled** status of the **C1-AuditEvent** business object in the **Status Reason** screen.

Procedure

To cancel an audit event:

1. Search for the audit event in the **Audit Event** screen.
2. In the **Search Results** section, click the link in the **Audit Event Information** column corresponding to the *a*udit event which you want to cancel.
   The **Audit Event** screen appears.
3. Ensure that the **Main** tab is selected.
4. Click the **Cancel** button in the **Audit Event** zone.

   The **Status Reason** window appears. It contains the following field:

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Field Name	Field Description	Mandatory (Yes or No)
Status Reason	Used to indicate the reason why you want to cancel the audit event.	Yes

Note: The **Cancel** button appears when the audit event is in the **Error** status.

5. Select the cancel reason from the **Status Reason** list.
6. Click **Save**.
   The status of the audit event is changed to **Canceled**.

Related Topics

For more information on...	See...
How to search for an audit event	Searching for an Audit Event on page 3784
Audit Event screen	Audit Event (Used for Viewing) on page 3786
Audit Event zone	Audit Event on page 3786

Viewing the Log of an Audit Event

Procedure

To view the log of an audit event:

1. Search for the audit event in the **Audit Event** screen.
2. In the **Search Results** section, click the link in the **Audit Event Information** column corresponding to the *a*udit event whose log you want to view.
   The **Audit Event** screen appears.
3. Click the **Log** tab.
   The **Log** tab appears.
4. View the complete trail of actions performed on the audit event in the **Audit Event Log** zone.

Related Topics

For more information on...	See...
How to search for an audit event	Searching for an Audit Event on page 3784
Audit Event screen	Audit Event (Used for Viewing) on page 3786
Audit Event Log zone	Audit Event Log on page 3787

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Chapter 45

Invoice Request

Topics:

- Invoice Request for Group Health Insurance Billing
- Invoice Request for Individual Health Insurance Billing
- Invoice Request for Direct Billed Group Membership Accounts
- Prerequisites
- Invoice Request Manual Trial Bill Generation (Without Approval) Status Transition
- Invoice Request Manual Regular Bill Generation (Without Approval) Status Transition
- Invoice Request Manual Regular Bill Generation (With Approval) Status Transition
- Invoice Request Automatic Regular Bill Generation (Without Approval) Status Transition
- Invoice Request Type
- Invoice Request (Used for Searching)
- Invoice Request (Used for Viewing)

Oracle Revenue Management and Billing enables you to create invoice request for the following lines of health insurance business:

- **Fully-Insured Group Business** - For more information about the invoice request for the fully-insured group business, see Invoice Request for Group Health Insurance Billing on page 3792 and Types of Invoice Request for Fully-Insured Group Business on page 3794
- **Fully-Insured Individual Business** - For more information about the invoice request for the fully-insured individual business, see and Invoice Request for Individual Health Insurance Billing on page 3796 and Types of Invoice Request for Fully-Insured Individual Business on page 3798

Invoice Request for Group Health Insurance Billing

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

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

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

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

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

Note:

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

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

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

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

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

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

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

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

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

> **Note:**
>
> The system will process a manual regular bill generation invoice request for an account in the deferred mode when the number of billable charges of the account exceeds the defer processing billable charge count.
>
> The defer processing billable charge count is not considered when a manual regular bill generation invoice request is created for a person.
>
> You can specify the defer processing billable charge count when the invoice mode is set to **Manual** and bill generation type is set to **Regular**.

- Whether the approval is required for the invoice request

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

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

> **Note:**
>
> If the invoice request is processed in the online mode, the system will process the invoice request when the processing date is earlier than or equal to the system date. However, if the invoice request is processed in the deferred mode, the system will process the invoice request when the processing date is earlier than or equal to the batch business date.
>
> If required, you can configure the system such that the processing date does not fall on a holiday. To implement this requirement you need to specify the work calendar which helps to determine the working day.

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

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

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

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

For more information about the types of invoice request, see Types of Invoice Request for Fully-Insured Group Business on page 3794.

For more information on how to setup the invoice request feature, see Prerequisites on page 3809.

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Types of Invoice Request for Fully-Insured Group Business

The system allows you to create the following types of invoice requests for the fully-insured group business:

- Manual Regular Bill Generation Invoice Request on page 3794
- Manual Trial Bill Generation Invoice Request on page 3795
- Automatic Regular Bill Generation Invoice Request on page 3795

Manual Regular Bill Generation Invoice Request

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

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

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

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

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

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

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

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open for the accounting date, the system creates the adhoc regular bill for the account in the **Pending** status. When you execute the **BSGENREQ** batch with the **Off Cycle Switch** parameter set to **Y**, the system creates the bill segments for the adhoc regular bill. When you execute the **POSTPROC** batch with the **Off Cycle Switch** parameter set to **Y**, the system creates the post-processing bill segments (if any) and completes the adhoc regular bill of the account. Finally, the status of the invoice request is changed to **Processed**.

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

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

Manual Trial Bill Generation Invoice Request

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

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

Automatic Regular Bill Generation Invoice Request

The following table lists the algorithms that you need to attach to the corresponding business objects in the respective scenarios:

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

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If you want to create an automatic invoice request for an account while…	Then attach the algorithm….			
	Business Object	**Status**	**System Event**	**Algor**
Note: This happens only on the customer onboarding. If an invoice request is already processed for any account in the person's hierarchy, the system will not create an invoice request for the account.				

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

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

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

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

Invoice Request for Individual Health Insurance Billing

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

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

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

The system enables you to create the following types of invoice request for the fully insured individual business:

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

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Note:

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

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

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

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

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

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

  Note: If the **Bill Generation Type** field is set to **Regular**, you must select the **Invoice Request - Regular Bill Generation** business object from the **Invoice Request Business Object** list. However, if the **Bill Generation Type** field is set to **Trial**, you must select the **Invoice Request - Trial Bill Generation** business object from the **Invoice Request Business Object** list.
- Whether a manual or automatic invoice request should be created in the system
- Whether a regular or trial bill generation invoice request should be created in the system
- Whether a manual regular bill generation invoice request for an account should be processed in the online or deferred mode

  Note:

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

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

  Note: You can set the **Approval Required** flag only when the invoice mode is set to **Manual** and bill generation type is set to **Regular**.
- The wait days using which the processing date is calculated for an invoice request

  Note: If the invoice request is processed in the online mode, the system will process the invoice request when the processing date is earlier than or equal to the system date. However, if the invoice request is processed in the deferred mode, the system will process the invoice request when the processing date is earlier than or equal to the batch business date.
- The date calculation algorithm which is used to calculate the cutoff date, bill date, processing date, and accounting date for an automatic regular bill generation invoice request

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Note:

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

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

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

System Event	Algorithm
Invoice Request Account Selection	C1-INVACTEL
Invoice Request Status Update	C1-INVRSTUP

For more information about the types of invoice request, see Types of Invoice Request for Fully-Insured Individual Business on page 3798.

For more information on how to setup the invoice request feature, see Prerequisites on page 3809.

Types of Invoice Request for Fully-Insured Individual Business

The system allows you to create the following types of invoice requests for the fully-insured individual business:

- Manual Regular Bill Generation Invoice Request on page 3798
- Manual Trial Bill Generation Invoice Request on page 3799
- Automatic Regular Bill Generation Invoice Request on page 3799

Manual Regular Bill Generation Invoice Request

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

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

If the processing date is earlier than or equal to the system date, the system checks whether the pending bill already exists for the account. If the pending bill does not exist for the account, the system checks whether the cutoff date is later than the bill after date. If cutoff date is later than the bill after date, the system checks whether the accounting calendar

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

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

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

Manual Trial Bill Generation Invoice Request

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

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

Automatic Regular Bill Generation Invoice Request

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

If you want to create an automatic invoice request for the account while…	**Then attach the algorithm….**			
	Business Object	**Status**	**System Event**	**Algorithm**
Activating an individual membership	C1-IndMembership	Active	Enter	C1-INVRQIMEN
Terminating an individual membership		Terminated	Enter	C1-INVRQIMTM
Reinstating a terminated individual membership		Active	Enter	C1-INVRQIMEN
Canceling an active individual membership		Canceled	Enter	C1-INVRQIMCN

You can create a single or different invoice request type for each individual membership event (such as, activation, termination, reinstatement, or cancelation) depending on the wait days you want to configure for the respective event. While attaching the above algorithms, you need to specify the following parameters:

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Algorithm	Parameter	Parameter Description
C1-INVRQIMEN	Invoice Request Type for Individual Membership New Enrollment	Used to indicate the invoice request type using which you want the system to automatically create an invoice request when an individual membership is activated. **Note:** This parameter is mandatory.
	Invoice Request Type for Individual Membership Reinstatement	Used to indicate the invoice request type using which you want the system to automatically create an invoice request when an individual membership is reinstated. **Note:** This parameter is optional.
	Termination Reason	Used to specify the termination reason. The system will automatically create an invoice request while reinstating an individual membership which was terminated due to the specified reason. **Note:** This parameter is valid only when you specify the value for the **Invoice Request Type for Individual Membership Reinstatement** parameter. This parameter is optional. If you do not specify the termination reason, the system will create the invoice request on the individual membership reinstatement irrespective of the termination reason. However, if you specify the termination reason, the system will create the invoice request on the individual membership reinstatement only when the individual membership was terminated due to the specified reason. You can specify maximum five comma-separated values for this parameter. You must specify a reason which is already defined for the **Terminated** status of the **C1-IndMembership** business object in the **Status Reason** screen.
C1-INVRQIMTM	Invoice Request Type	Used to indicate the invoice request type using which you want the system to automatically create an invoice request when an individual membership is terminated. **Note:** This parameter is mandatory.
	Termination Reason	Used to specify the termination reason. The system will automatically create an invoice

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Algorithm	Parameter	Parameter Description
		request when the individual membership is terminated due to the specified reason. **Note:** This parameter is optional. If you do not specify the termination reason, the system will create the invoice request on the individual membership termination irrespective of the termination reason. However, if you specify the termination reason, the system will create the invoice request on the individual membership termination only when the individual membership is terminated due to the specified reason. You can specify maximum five comma-separated values for this parameter. You must specify a reason which is already defined for the **Terminated** status of the **C1-IndMembership** business object in the **Status Reason** screen.
C1-INVRQIMCN	Invoice Request Type	Used to indicate the invoice request type using which you want the system to automatically create an invoice request when an individual membership is canceled. **Note:** This parameter is mandatory.
	Cancelation Reason	Used to specify the cancellation reason. The system will automatically create an invoice request when the individual membership is canceled due to the specified reason.

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Algorithm	Parameter	Parameter Description
		Note: This parameter is optional. If you do not specify the cancellation reason, the system will create the invoice request on the individual membership cancellation irrespective of the cancellation reason. However, if you specify the cancellation reason, the system will create the invoice request on the individual membership cancellation only when the individual membership is canceled due to the specified reason. You can specify maximum five comma-separated values for this parameter. You must specify a reason which is already defined for the **Canceled** status of the **C1-IndMembership** business object in the **Status Reason** screen.

The system determines the account to which the individual membership should be billed using the Account Identifier Type and Account Identifier Value characteristics which are defined on the individual membership. While fetching the characteristics, the system considers the characteristic types which are specified in the **Account Identifier Type Char Type** and **Account Identifier Value Char Type** option types of the **C1-ASOBLLNG** feature configuration. Before automatically creating an invoice request for the account of an individual membership, the system validates whether the individual membership is eligible for the invoice request creation. If the individual membership is eligible for the invoice request creation, the system checks whether any invoice request already exists for the account in the non-final status. If an invoice request exists for the account in the non-final status, a new invoice request is not created for the account. However, if an invoice request does not exist for the account in the non-final status, a new invoice request is created for the account in the **Draft** status. The system then transitions the status of the invoice request from **Draft** to **Defer Processing Batch**.

Note:

The system validates whether the individual membership is eligible for the invoice request creation only while activating an individual membership and not while terminating, reinstating, or canceling an individual membership.

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

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

However, if the pending bill exists for the account, or if the cutoff date is earlier than or equal to the bill after date, or if the accounting calendar is not open for the accounting date, or if an error occurs while creating adhoc regular bill or its

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bill segments, or if a To Do is generated for the bill review, the status of the invoice request is changed to **Error**. The system enables you to move such erroneous invoice request back to the **Draft** status.

Generate Bill for Each Coverage Period on Account's Hold Release

Oracle Revenue Management and Billing enables you to create automatic regular bill generation invoice request for an account which is eligible for invoice request creation whenever hold on its bill generation process is released. On manually or automatically releasing a hold on the bill generation process of an account, the system checks whether the **Eligible For Invoice Request Creation (INVRACTE)** characteristic is set to **Y** for the account. If so, the system creates an entry for the account in the **F1_GEN_PROC** table and stamps the **C1-IRBHR** batch control against it.

On executing the **C1-IRBHR** batch control, the system considers the records in the **F1_GEN_PROC** table. For each record where the batch control is set to **C1-IRBHR**, the batch checks the following:

- The respective account is eligible for invoice request creation (i.e., the **INVRACTE** characteristic type is set to **Y**).
- The bill generation process of the respective account is not kept on hold through a hold request.

If both the above conditions are met, the system creates an invoice request for the account using the invoice request type given in the **Systematic Invoice Request Type for Hold Release** parameter.

The batch then checks whether the **C1-SPCVB** characteristic type is defined for the account and its characteristic value is set to **Y**. If so, the batch stamps the **C1-IRSCP** characteristic type on the invoice request and sets it to the accounting date after the last billed coverage. The status of such invoice request is set to **Defer Processing**. However, if the **C1-SPCVB** characteristic type is not defined for the respective account, the system will not stamp the **C1-IRSCP** characteristic type on the invoice request. The status of such invoice request is set to **Defer Processing Batch**. Once the invoice request is created for an account, the entry for the respective account is removed from the **F1_GEN_PROC** table.

Note: The processing date of the invoice request is set to system date + wait days (defined in the respective invoice request type).

On executing the **C1-INVRQ** batch, the system checks whether there are any invoice requests in the **Defer Processing** status. If there is an invoice request in the **Defer Processing** status, the system checks whether the processing date of the invoice request is earlier than or equal to the batch business date. If the processing date is earlier than or equal to the batch business date, the status of the invoice request is changed to **Processing** and the algorithm attached to the **Processing** status is invoked. However, if the processing date is later than the batch business date, the status of the invoice request remains as **Defer Processing**. Once the invoice request is processed, the batch creates multiple bills for the account – one for each coverage period – against the invoice request. On executing the billing batches with the **Off Cycle Switch** parameter set to **Y** and **Off Cycle Mode** parameter set to **I**, the system checks whether the account that meets the search criteria is included in any invoice request with the **Defer Processing Batch** status. If the account is included in an invoice request with the **Defer Processing Batch** status, the system checks whether the processing date of the invoice request is earlier than or equal to the batch business date.

If the processing date is earlier than or equal to the batch business date, the system checks whether there is any record in the **PROC** (i.e., **Processing**) status for the account in the invoice request. If so, the system checks whether the pending bill already exists for the account. If the pending bill does not exist for the account, the system checks whether the cutoff date is later than the bill after date. If cutoff date is later than the bill after date, the system checks whether the accounting calendar is open for the accounting date. If the accounting calendar is open for the accounting date, the system creates a single consolidated bill for multiple coverage periods against the invoice request of the account.

Note: At present, this feature is tested and certified only for the fully insured individual business and not for any other lines of health insurance business.

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Generate Bill for Each Coverage Period on Late Enrollment or Reinstatement

Until now, the system enabled you to create an automatic invoice request for the respective account whenever an individual membership is enrolled or reinstated. Once this automatic invoice request was processed, the system used to create a bill for the account against the invoice request. However, in case of late enrollment or reinstatement, the system created a single consolidated bill for multiple coverage periods which were yet to be billed (i.e., a bill containing one bill segment for each such coverage period). However, the business requires separate bill for each coverage period instead of one consolidated bill. To implement this business requirement, we have enhanced the existing automatic regular bill generation invoice request feature for the fully insured individual business. The following changes are made to the system:

- The following new characteristic types are introduced in this release:
  - **Eligible for Separate Coverage Billing (C1-SPCVB)** – You need to define this characteristic type for an account for which you want to create a separate bill for each individual membership coverage period. You can define this characteristic for an account from the user interface, through a membership repricing request, or through a health care inbound message.
  - **Accounting date of earliest missed coverage (C1-IRSCP)** – On creating an automatic regular bill generation invoice request, the system automatically defines the **C1-IRSCP** characteristic type for the invoice request when the **C1-SPCVB** characteristic of the respective account is set to **Y**.
- The following new parameters are added in the **C1-INVRQIMEN** algorithm type:
  - **Invoice Request Type for Individual Membership New Enrollment - Separate Bill** – Used to specify the invoice request type using which you want to create an invoice request for an account for which a separate bill must be created for each individual membership coverage period on late enrollment.
  - **Invoice Request Type for Individual Membership Reinstatement - Separate Bill** – Used to specify the invoice request type using which you want to create an invoice request for an account for which a separate bill must be created for each individual membership coverage period on reinstatement.

On an individual membership enrollment or reinstatement, the system will check the following:

- The membership or account to which the membership is billed is eligible for invoice request creation (i.e., the **INVRACTE** characteristic type is set to **Y**).
- The bill generation process of the respective account is not kept on hold through a hold request.

If both the above conditions are met, the system will invoke the **C1-INVRQIMEN** algorithm attached to the **Active** status of the **C1-IndMembership** business object. This algorithm will then check whether the **C1-SPCVB** characteristic type is defined for the account and its characteristic value is set to **Y**.

If the **C1-SPCVB** characteristic type is defined for the account and its characteristic value is set to **Y**, the system will create an automatic regular bill generation invoice request where the **C1-IRSCP** characteristic type is set to the accounting date of earliest missed coverage. In case of late enrollment, the accounting date is set based on the membership start date. However, in case of reinstatement, the accounting date is set based on the membership termination date. The status of the invoice request is set to **Defer Processing**. The processing date of the invoice request is set to system date + wait days (defined in the respective invoice request type).

You need to then execute the **C1-INVRQ** batch. On executing the **C1-INVRQ** batch, the system checks whether there are any invoice requests in the **Defer Processing** status. If there is an invoice request in the **Defer Processing** status, the system checks whether the processing date of the invoice request is earlier than or equal to the batch business date. If the processing date is earlier than or equal to the batch business date, the status of the invoice request is changed to **Processing** and the algorithm attached to the **Processing** status is invoked. However, if the processing date is later than the batch business date, the status of the invoice request remains as **Defer Processing**. Once the invoice request is processed, the batch creates multiple bills for the account – one for each coverage period – against the invoice request.

However, if the **C1-SPCVB** characteristic type is not defined for the respective account, the system will create automatic regular bill generation invoice request where the **C1-IRSCP** characteristic type is not defined (i.e., in the traditional manner). The status of the invoice request is set to **Defer Processing Batch**. The processing date of the invoice request

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is set to system date + wait days (defined in the respective invoice request type). When such invoice request is processed through the billing batches, the system will create a single consolidated bill for multiple coverage periods against the invoice request of the account.

Invoice Request for Direct Billed Group Membership Accounts

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

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

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

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

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

Note:

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

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

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

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

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

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

  Note: If the **Bill Generation Type** field is set to **Regular**, you must select the **Invoice Request - Regular Bill Generation** business object from the **Invoice Request Business Object** list. However, if the **Bill Generation Type** field is set to **Trial**, you must select the **Invoice Request - Trial Bill Generation** business object from the **Invoice Request Business Object** list.
- Whether a manual or automatic invoice request should be created in the system
- Whether a regular or trial bill generation invoice request should be created in the system
- Whether a manual regular bill generation invoice request for an account should be processed in the online or deferred mode

  Note:

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

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

  Note: You can set the **Approval Required** flag only when the invoice mode is set to **Manual** and bill generation type is set to **Regular**.
- The wait days using which the processing date is calculated for an invoice request

  Note: If the invoice request is processed in the online mode, the system will process the invoice request when the processing date is earlier than or equal to the system date. However, if the invoice request is processed in the deferred mode, the system will process the invoice request when the processing date is earlier than or equal to the batch business date.
- The date calculation algorithm which is used to calculate the cutoff date, bill date, processing date, and accounting date for an automatic regular bill generation invoice request

Note:

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

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

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

System Event	**Algorithm**
Invoice Request Account Selection	C1-INVACTEL
Invoice Request Status Update	C1-INVRSTUP

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Types of Invoice Request for Direct Billed Group Membership Accounts

The system allows you to create the following types of invoice requests for the direct billed group membership accounts:

- Manual Regular Bill Generation Invoice Request on page 3807
- Manual Trial Bill Generation Invoice Request on page 3807
- Automatic Regular Bill Generation Invoice Request on page 3808

Manual Regular Bill Generation Invoice Request

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

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

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

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

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

Manual Trial Bill Generation Invoice Request

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

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

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- At present, a To Do is not generated for a trial bill review, and therefore the system does not check whether a To Do is generated for a trial bill review.

Automatic Regular Bill Generation Invoice Request

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

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

Note:

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

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

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

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

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

Note:

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

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

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

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

Prerequisites

To setup the invoice request process, you need to do the following:

- Define the required invoice request types in the system.
- Define the required characteristic types where the characteristic entity is set to **Invoice Request Type**
- Define the required characteristic types where the characteristic entity is set to **Invoice Request**
- Assign the **C1-INVRA** To Do type to a To Do role whose users must receive To Do generated while submitting an invoice request for approval
- Assign the **C1-INVRS** To Do type to a To Do role whose users must receive To Do generated while resubmitting an invoice request
- Set the batch control type of the **Invoice Request Periodic Monitor (C1-INVRQ)** batch to **Timed** and define the following attributes:
  - Time Interval
  - Timer Active
  - User ID
  - Batch Language
  - Email Address

  For more information about the **Invoice Request Periodic Monitor (C1-INVRQ)** batch, see *Oracle Revenue Management and Billing Batch Guide*.
- Set the batch control type of the **Pending Bill Generation (BILLOPEN)**, **Bill Segment Generation (BSGENREG)**, and **Bill Completion (POSTPROC)** batches to **Timed** and define the following attributes:

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- Time Interval
- Timer Active
- User ID
- Batch Language
- Email Address

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

Set the following feature configuration in the system:

- **Invoice Request Configuration (C1-INVREQ)**

Invoice Request Manual Trial Bill Generation (Without Approval) Status Transition

The following figure graphically indicates how an invoice request in the manual trial bill generation process moves from one status to another when the approval process is not configured in the invoice request type:

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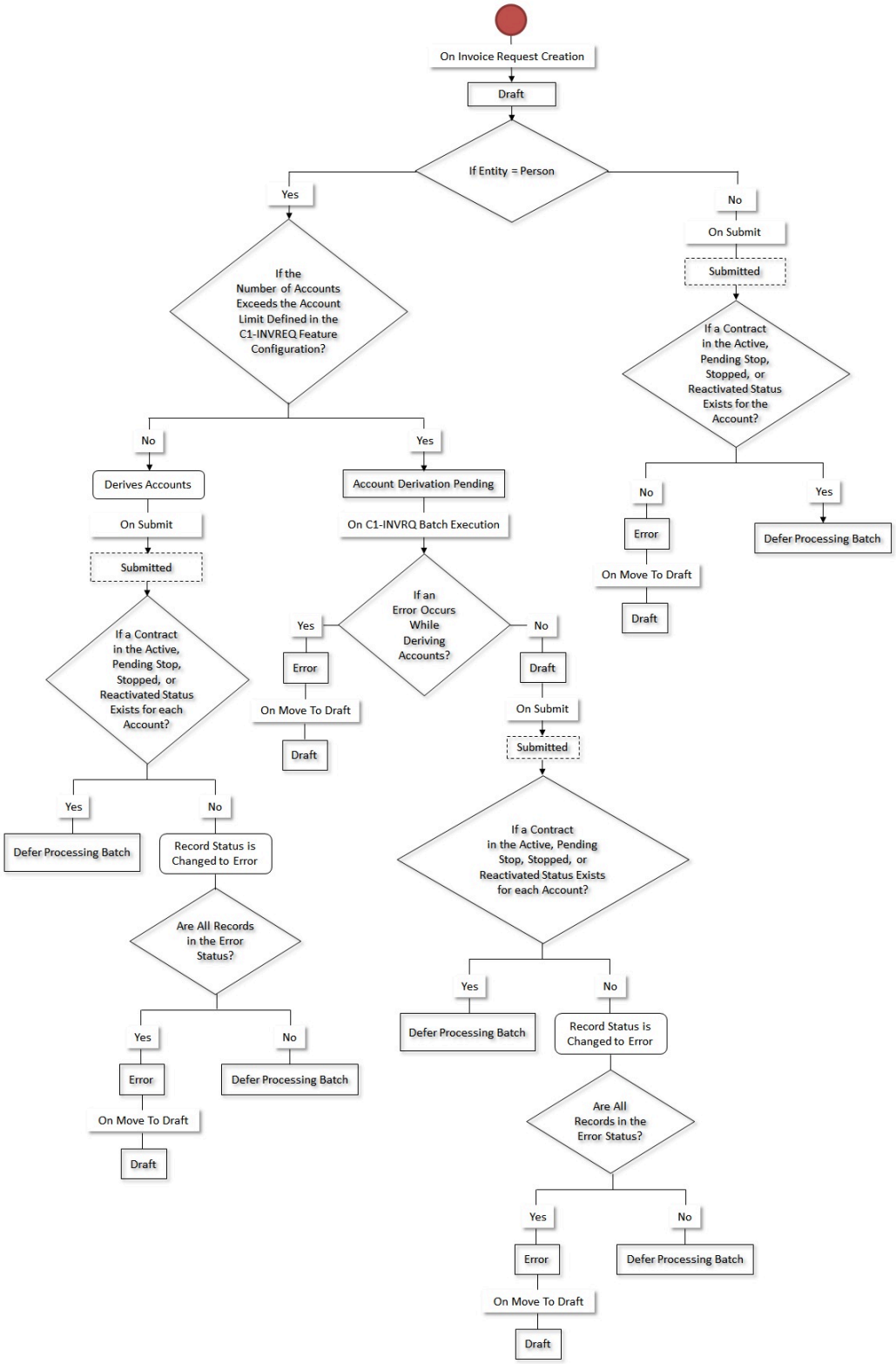

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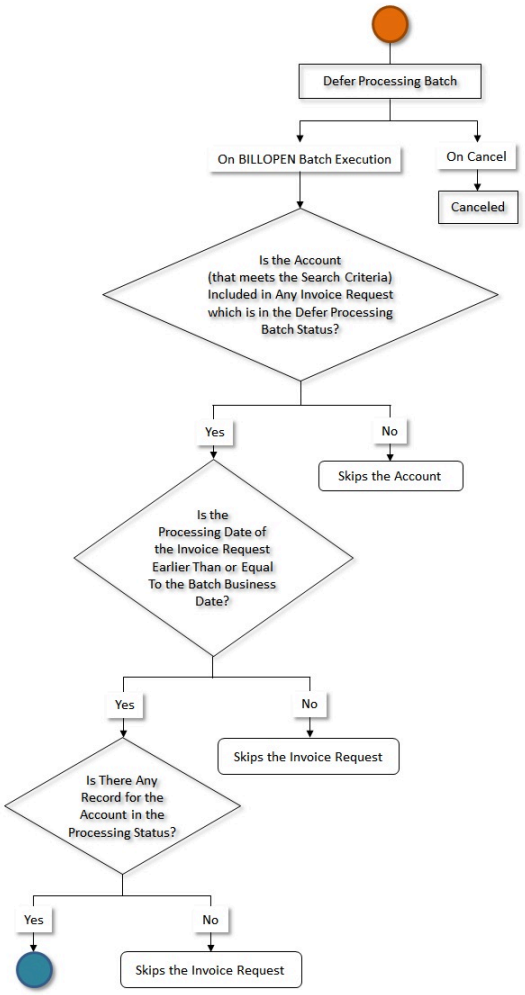

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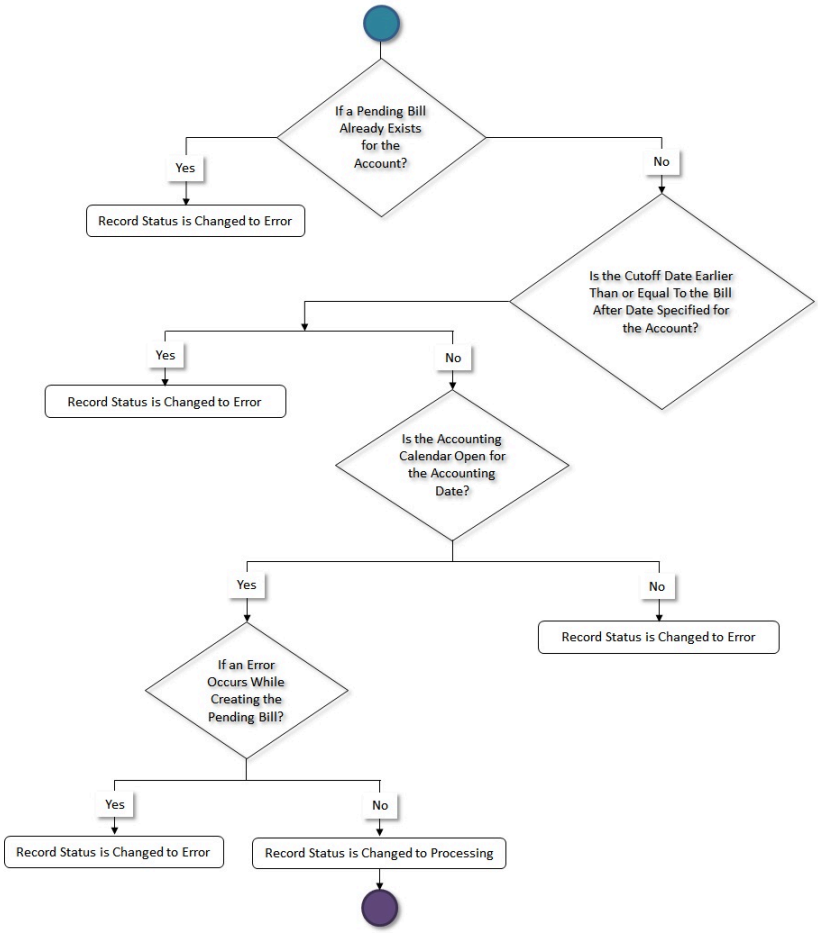

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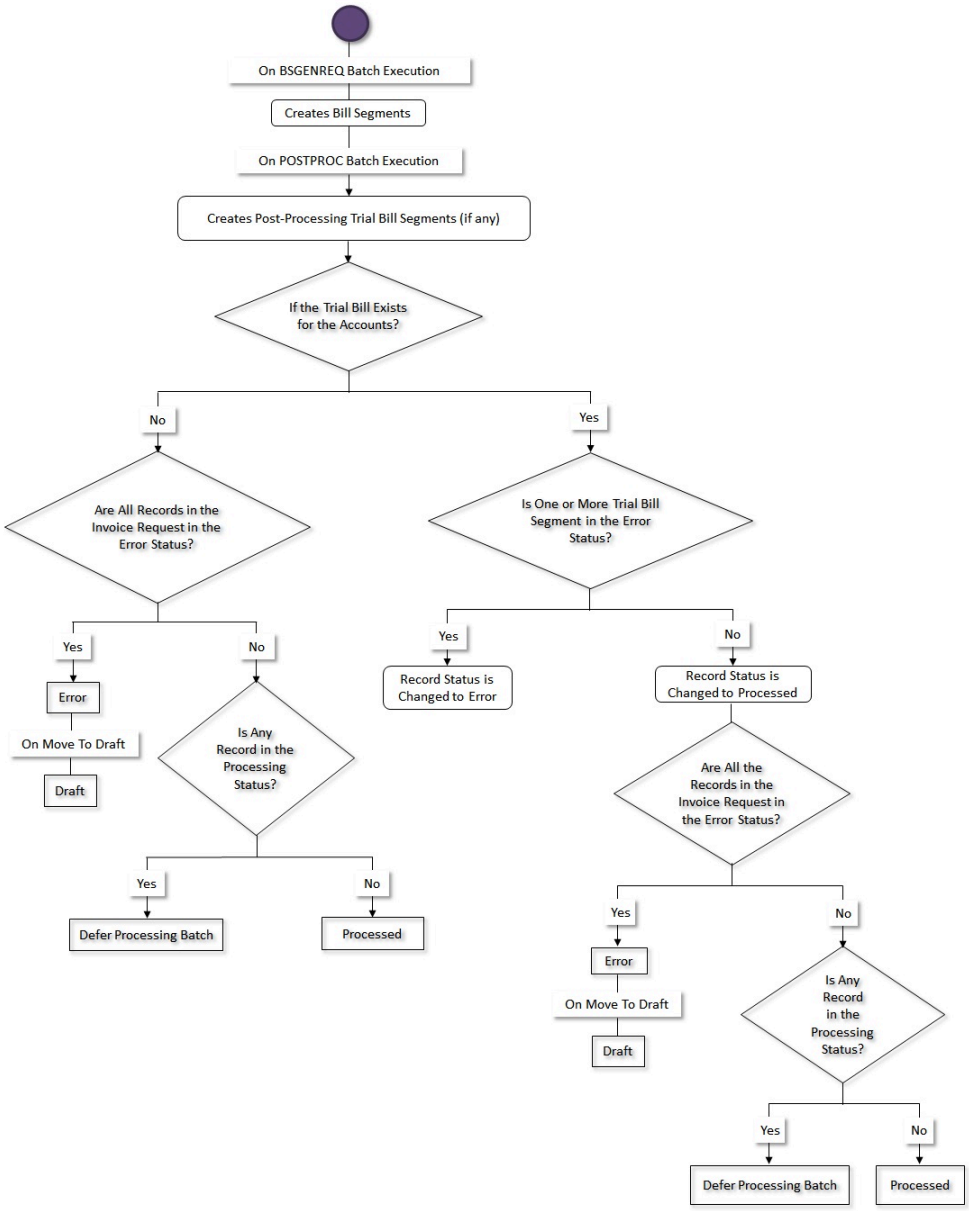

Invoice Request Manual Regular Bill Generation (Without Approval) Status Transition

The following figure graphically indicates how an invoice request in the manual regular bill generation process moves from one status to another when the approval process is not configured in the invoice request type:

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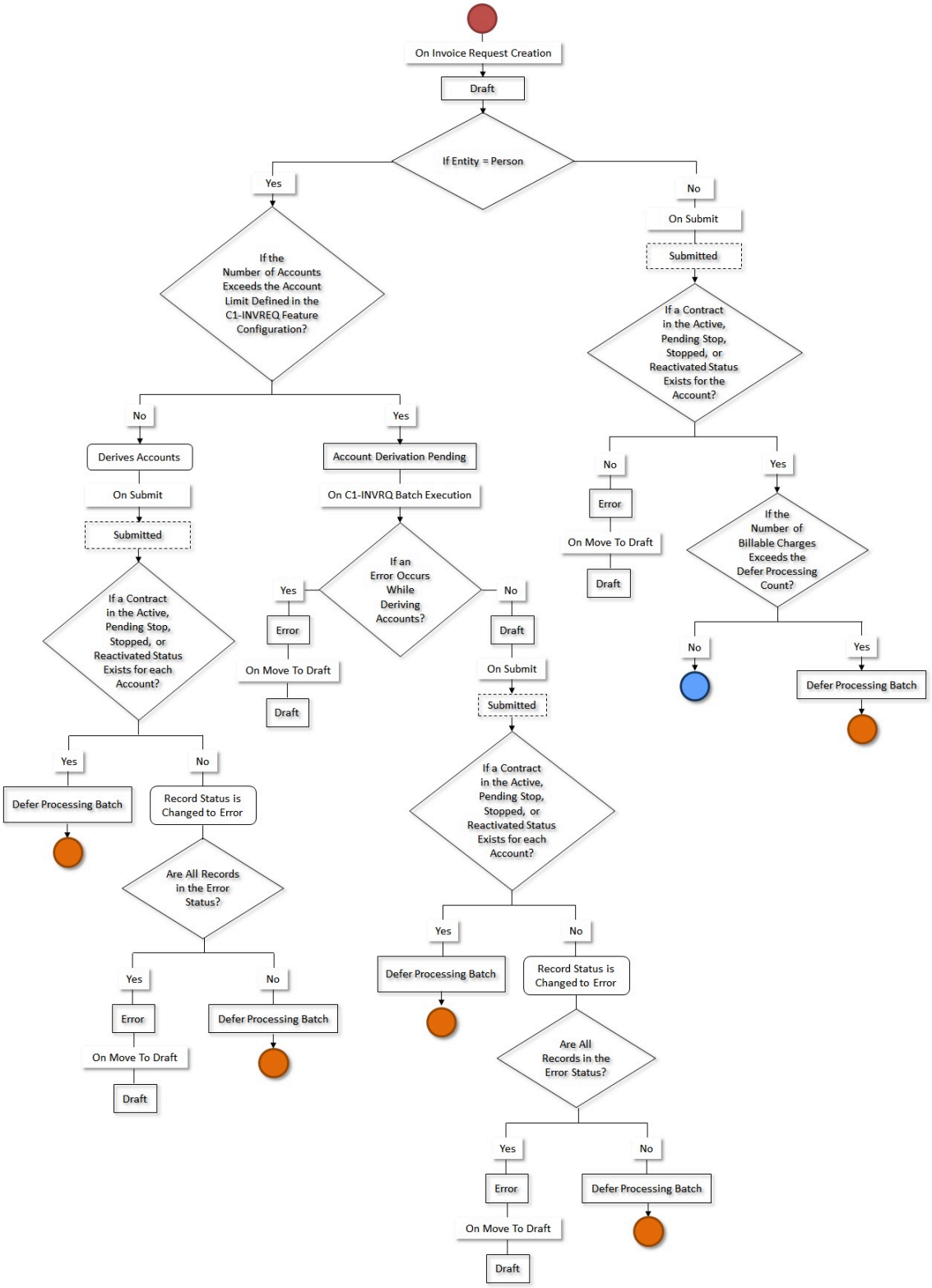

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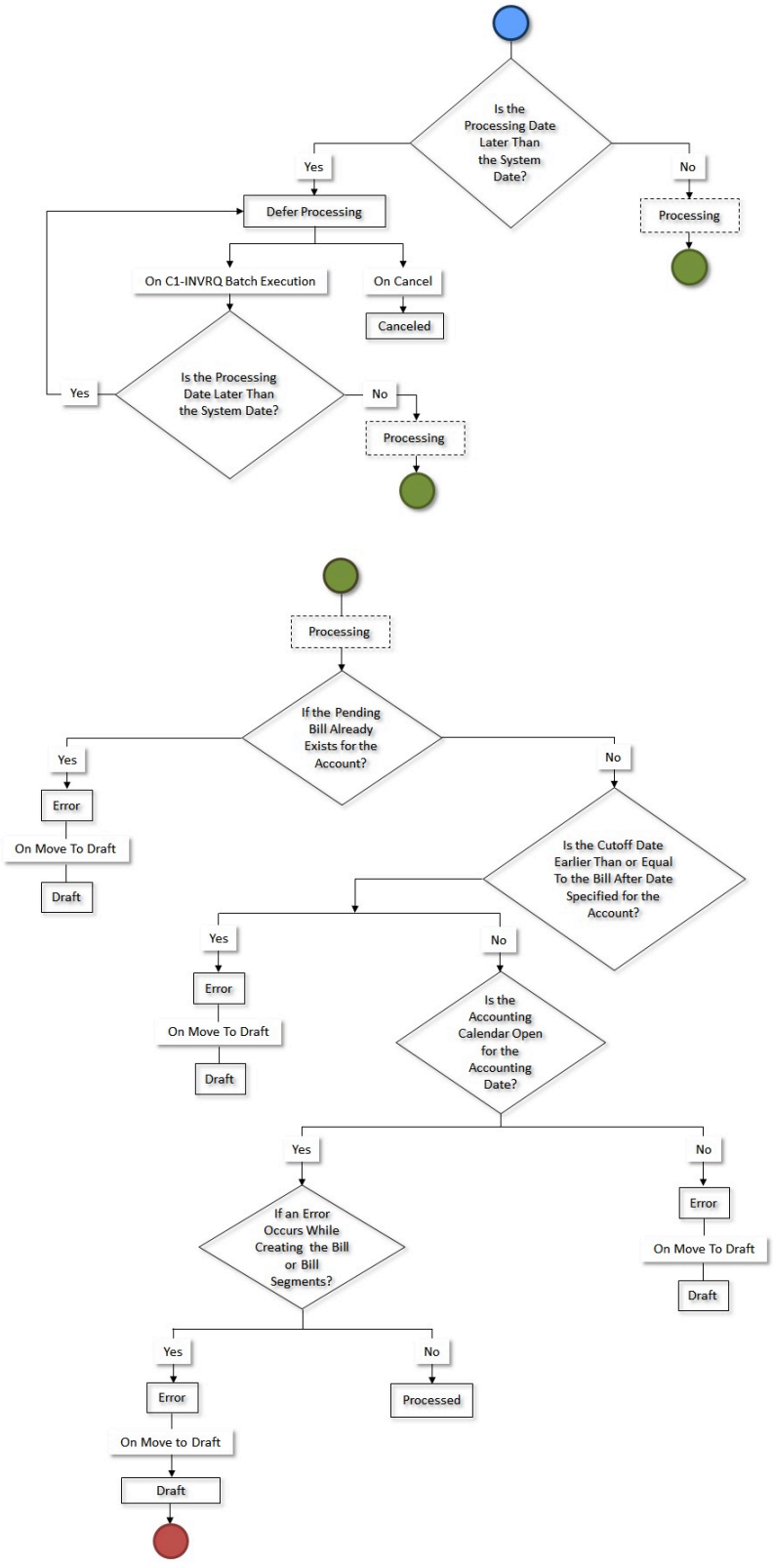

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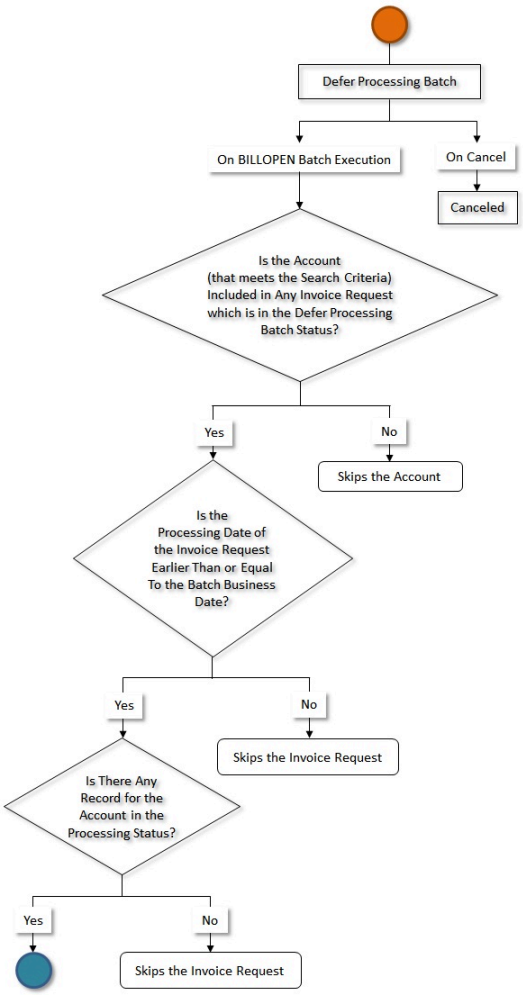

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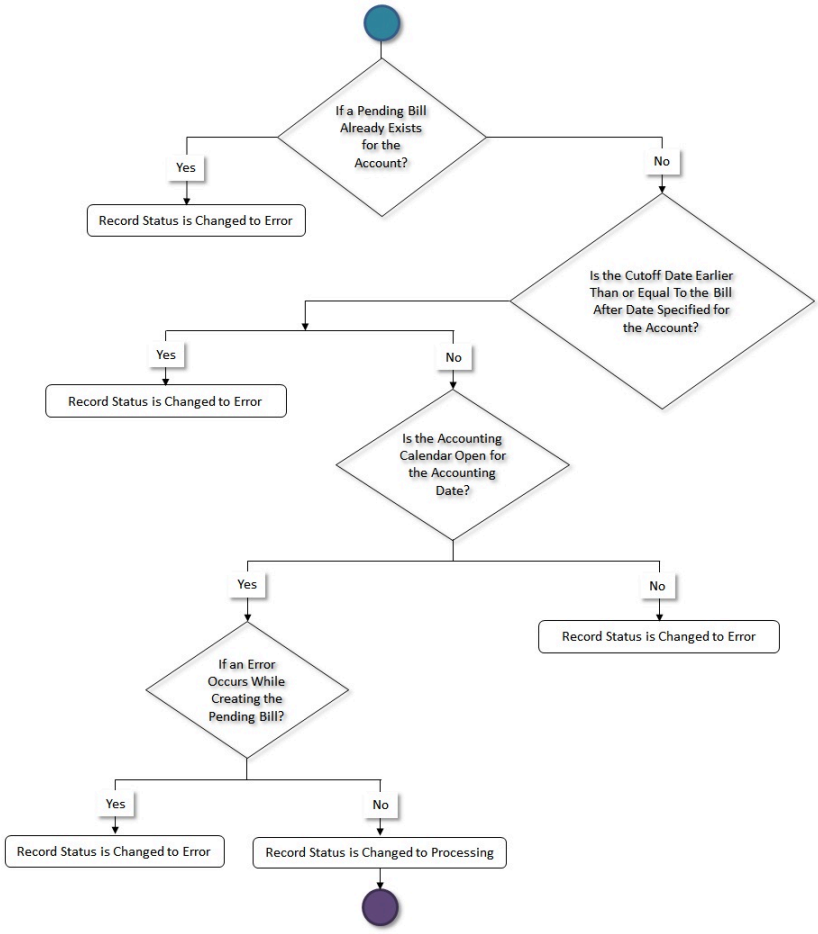

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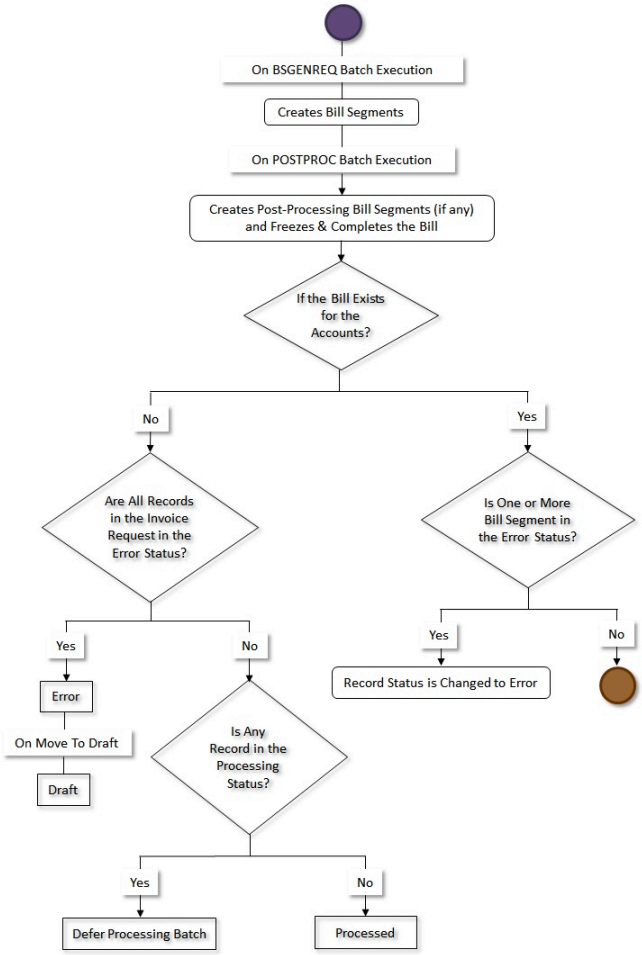

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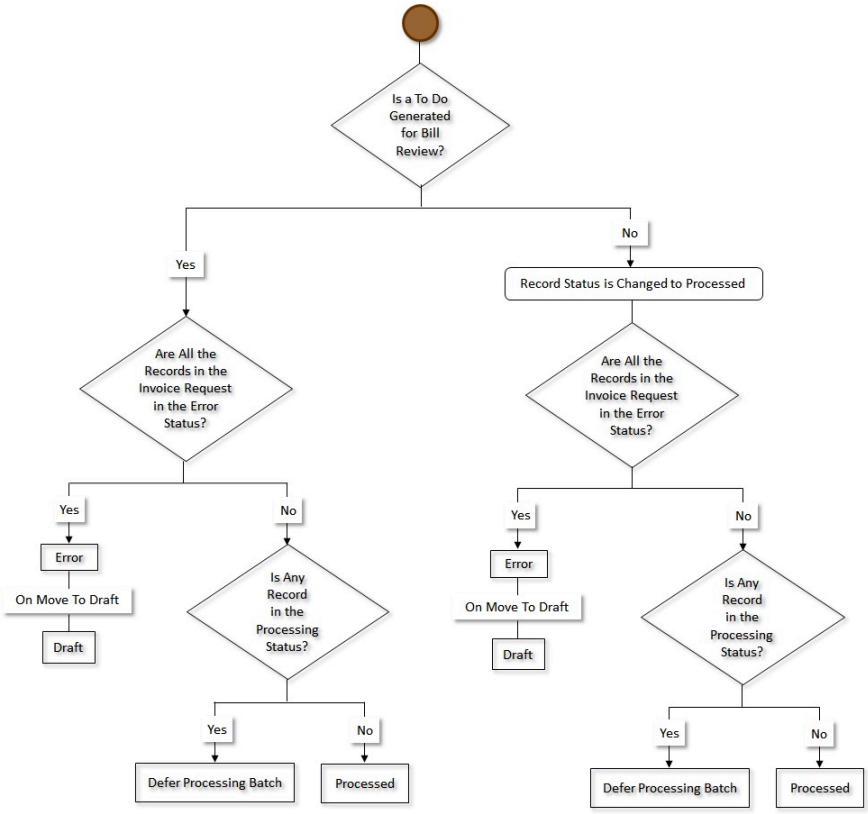

Invoice Request Manual Regular Bill Generation (With Approval) Status Transition

The following figure graphically indicates how an invoice request created through the manual regular bill generation process moves from one status to another when the approval process is configured in the invoice request type:

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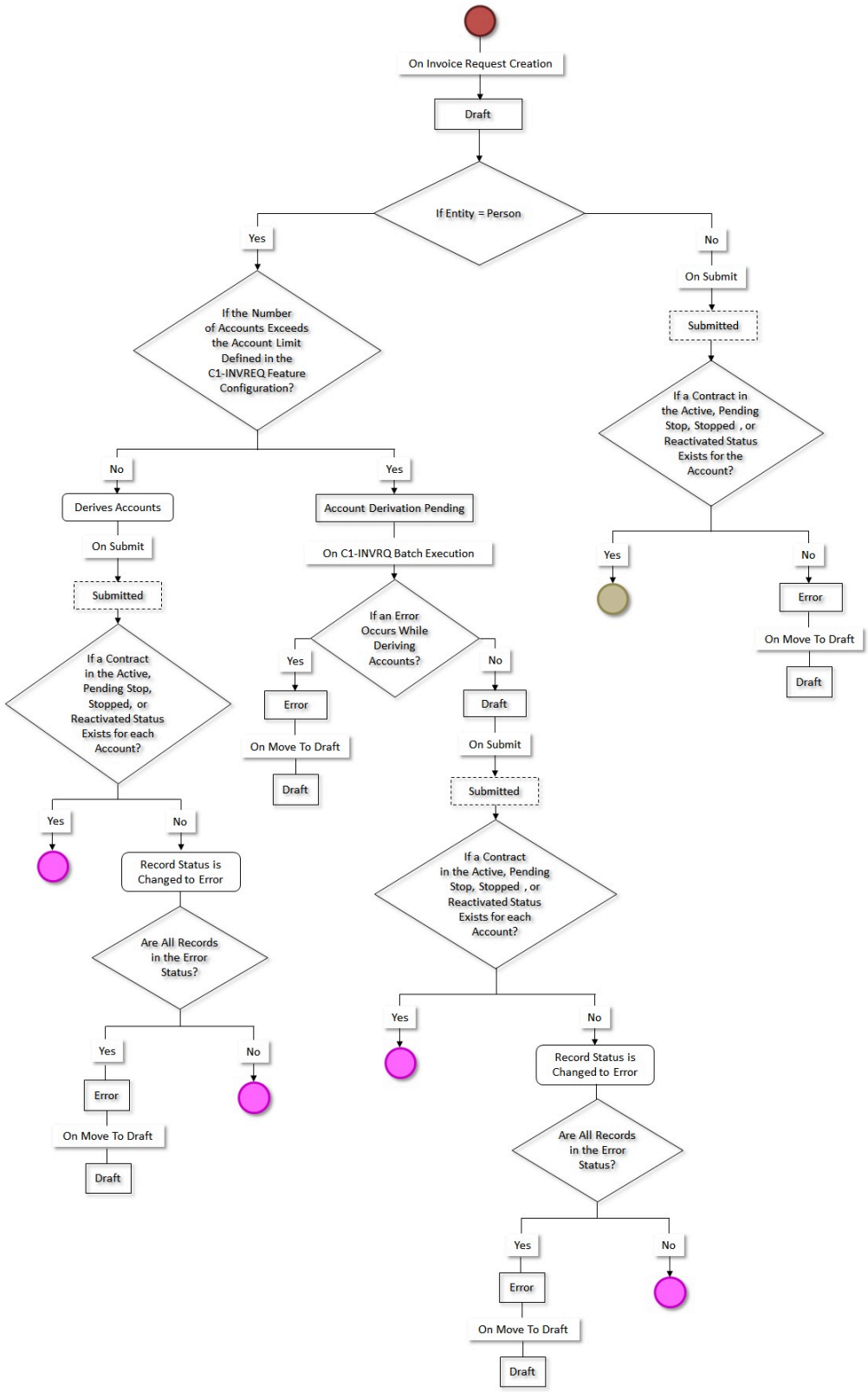

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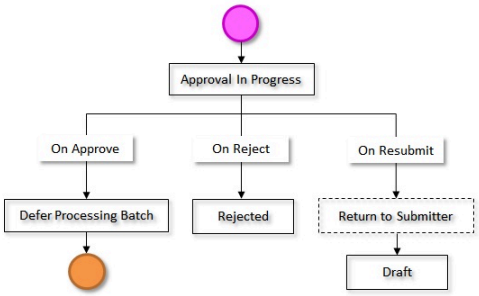

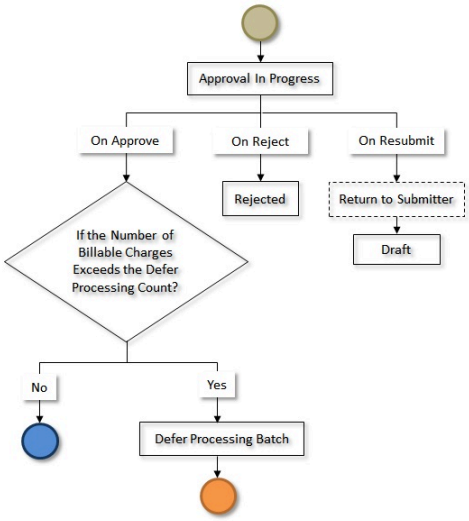

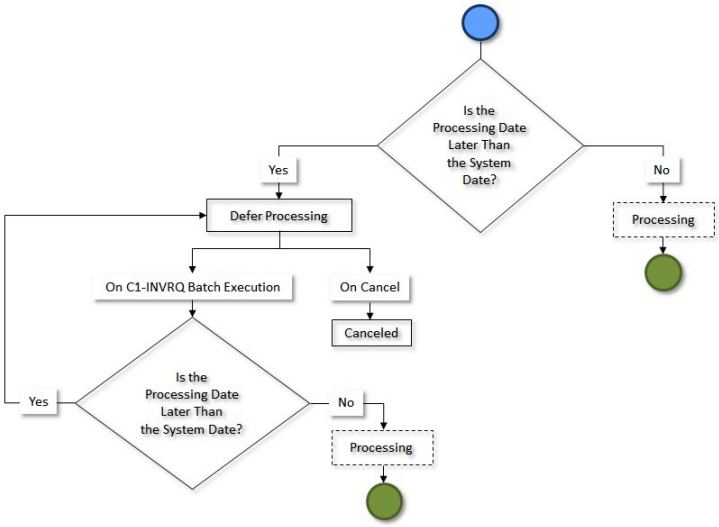

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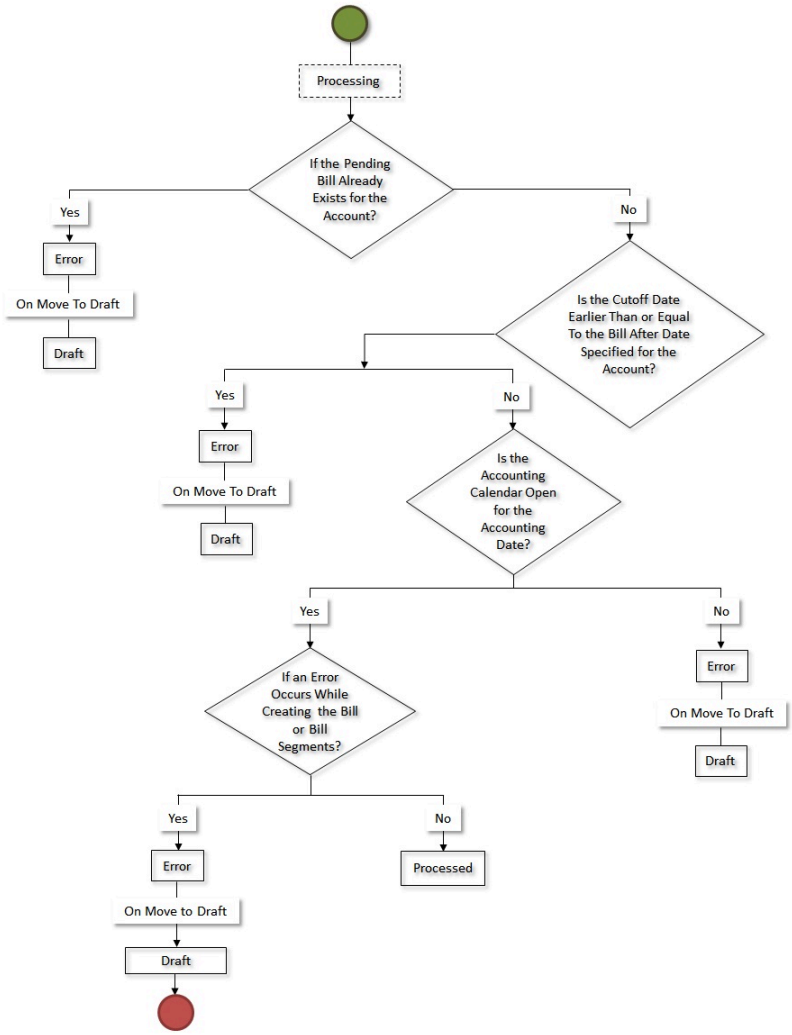

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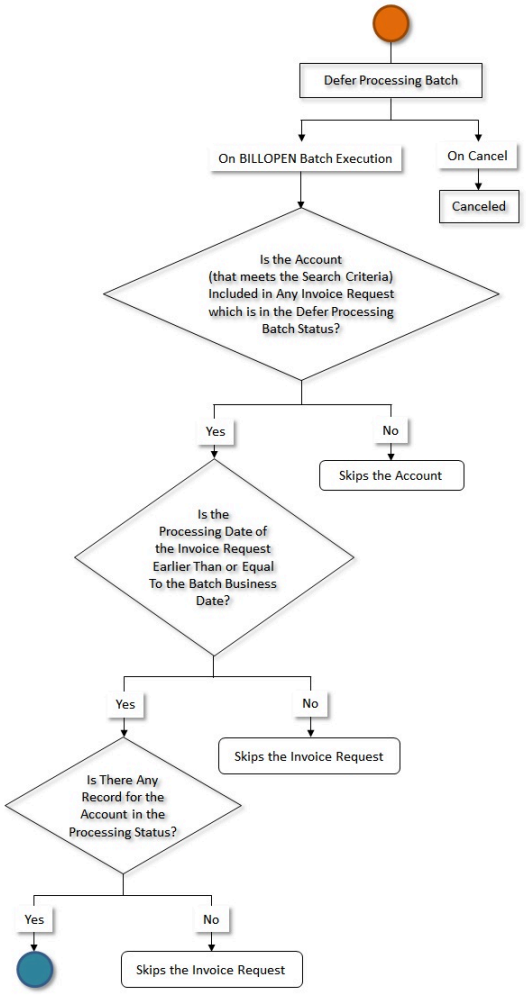

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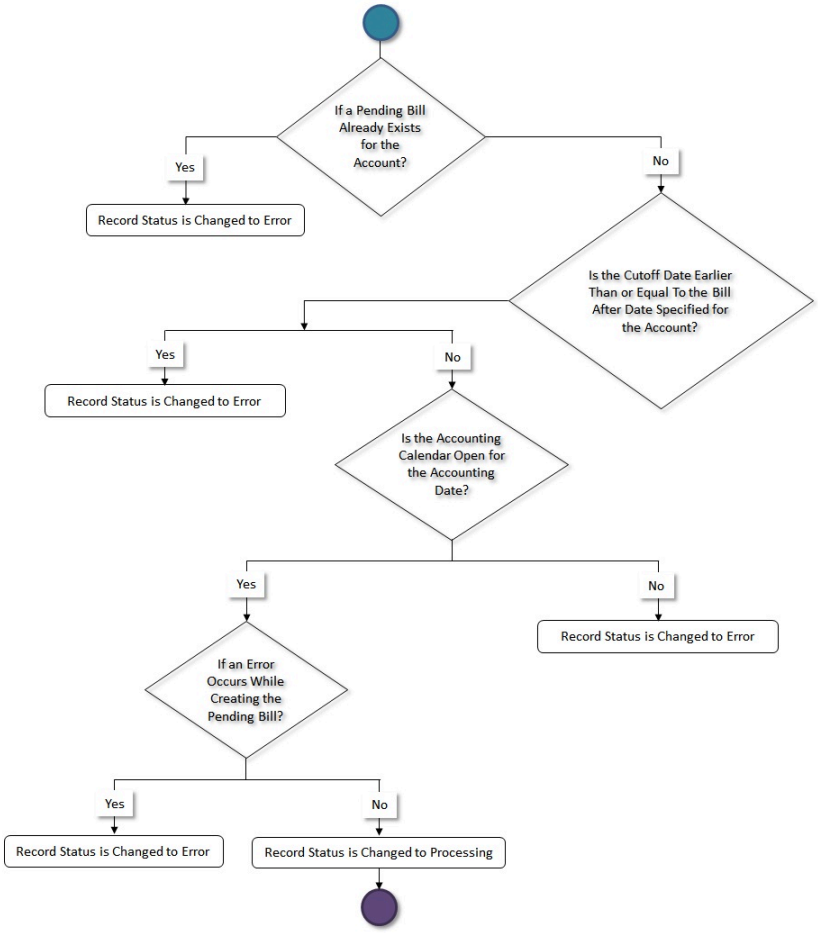

Invoice Request Automatic Regular Bill Generation (Without Approval) Status Transition

The following figure graphically indicates how an invoice request created through the automatic regular bill generation process moves from one status to another when the approval process is not configured in the invoice request type:

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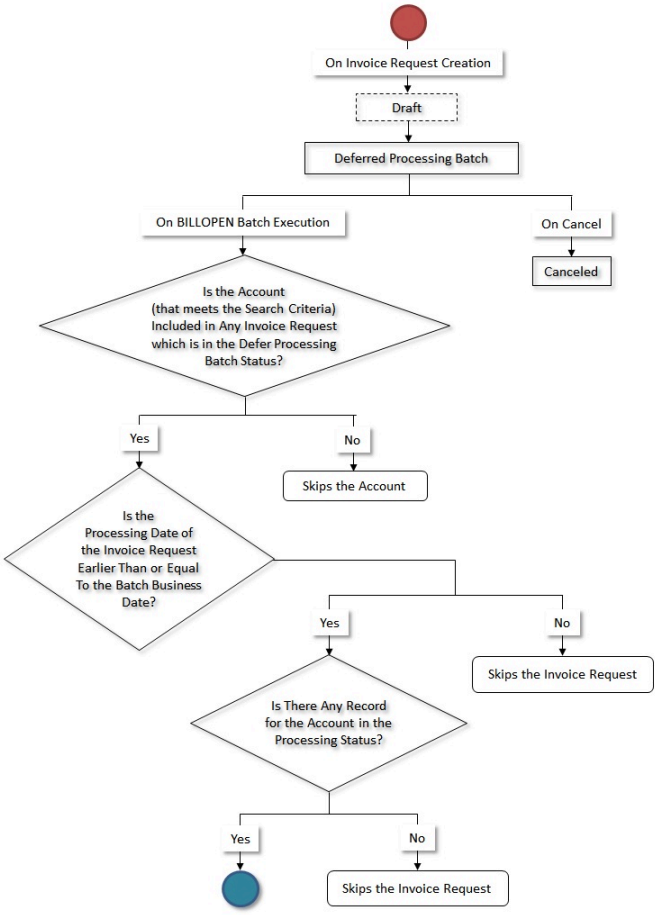

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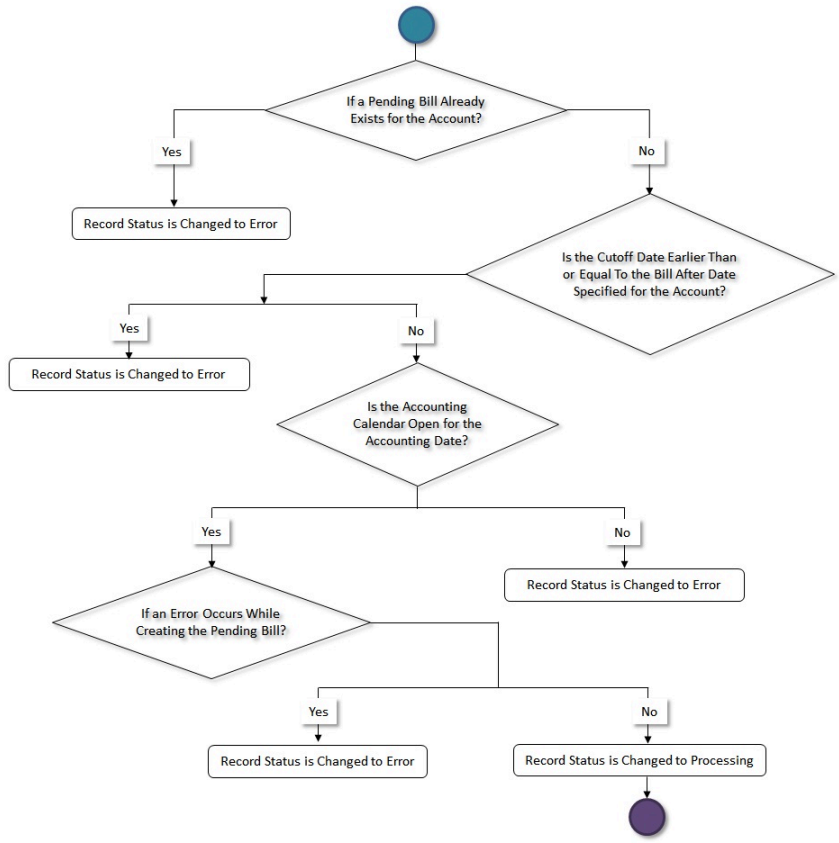

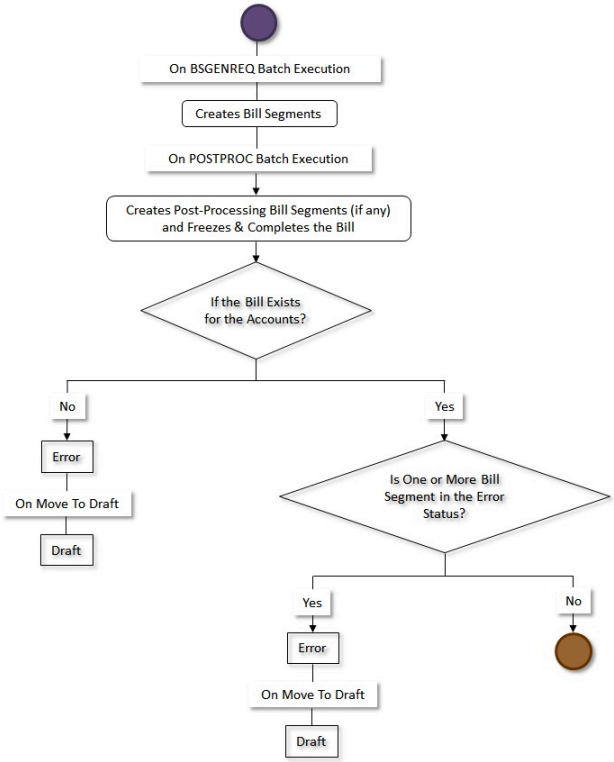

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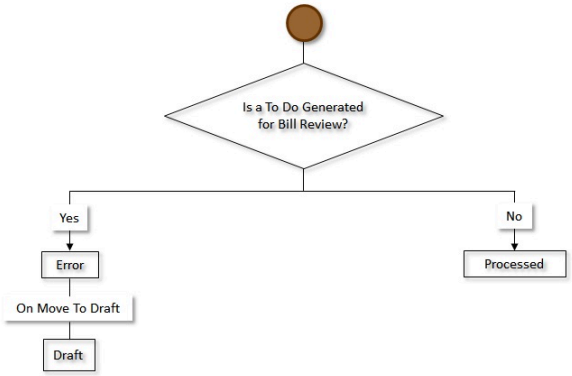

Invoice Request Type

Oracle Revenue Management and Billing enables you to configure an invoice request type using which you can create an invoice request. The invoice request type helps the system to determine:

- The invoice request business object for which the invoice request should be created in the system
- The mode in which the invoice should be created in the system
- The bill generation type using which the invoice should be created in the system
- Whether a manual regular bill generation invoice request for an account should be processed in the online or deferred mode
- The date calculation algorithm which is used to calculate the processing date for an automatic regular bill generation invoice request
- Whether the approval is required for the invoice request
- The submitter To Do role for resubmitting the invoice request for approval
- The wait days which is used to calculate the invoice request processing date

Note: The automatic invoice request is designed to work only for the fully-insured group and individual health insurance businesses and not for the financial services or self-funded health insurance businesses.

The **Invoice Request Type** screen allows you to define, edit, copy, delete, and view the details of an invoice request type. It contains the following zones:

- Invoice Request Type List on page 3828
- Invoice Request Type on page 3829

Invoice Request Type List

The **Invoice Request Type List** zone lists the invoice request types that are already defined in the system. It contains the following columns:

Column Name	Column Description
Invoice Request Type	Displays the invoice request type.
Description	Displays the description of the invoice request type.
Edit	On clicking the **Edit** (✎) icon, the **Invoice Request Type** screen appears where you can edit the details of the invoice request type.
Duplicate	On clicking the **Duplicate** (⧉) icon, the **Invoice Request Type** screen appears where you can define a new invoice request type using an existing invoice request type.

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Column Name	Column Description
Delete	On clicking the **Delete** (🗑) icon, you can delete the invoice request type.
	Note: You can delete an invoice request type only when an invoice request is not yet created using the invoice request type.

On clicking the **Broadcast** (📡) icon corresponding to an invoice request type, the **Invoice Request Type** zone appears with the details of the respective invoice request type.

Related Topics

For more information on...	See...
How to edit an invoice request type	Editing an Invoice Request Type on page 3837
How to copy an invoice request type	Copying an Invoice Request Type on page 3841
How to delete an invoice request type	Deleting an Invoice Request Type on page 3841
How to view the details of an invoice request type	Viewing the Invoice Request Type Details on page 3845

Invoice Request Type

The **Invoice Request Type** zone displays the details of the invoice request type. It contains the following sections:

- **Main** - The **Main** section displays basic information about the invoice request type. It contains the following fields:

Field Name	Field Description
Invoice Request Type	Displays the invoice request type.
Description	Displays the description of the invoice request type.
Invoice Request Business Object	Indicates the business object using which the invoice request should be created in the system. In addition, the context menu (⊙) icon appears corresponding to this field which helps in navigating to other screens in the application.
	Note: It has a link. On clicking the link, the **Business Object** screen appears where you can view the details of the respective business object.
Detailed Description	Displays additional information about the invoice request type.
Status	Indicates the current status of the invoice request type. The valid values are: • Active • Inactive
Invoice Mode	Indicates the mode in which the invoice request is created in the system using the invoice request type. The valid values are: • Automatic • Manual

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Field Name	Field Description
Bill Generation Type	Indicates the type of bill that is generated for the invoice request in the system. The valid values are: • Regular • Trial
Defer Processing Billable Charge Count	Displays the count which helps to determine whether the invoice request must be processed in the deferred mode (i.e. in the background) or in real time (i.e. immediately). If the number of billable charges created for the bills which are selected in the invoice request exceeds the defer processing billable charge count, the system processes the invoice request in the deferred mode. However, if the number of billable charges created for the bills which are selected in the invoice request does not exceed the defer processing billable charge count, the system processes the invoice request in real time (i.e. immediately).
	Note: This field appears only when the **Invoice Mode** is set to**Manual** and the **Bill Generation Type** is set to **Regular**. If you set the defer processing billable charge count to zero (0), the system resets the default value to 500.
Date Calculation Algorithm	Indicates the algorithm using which the date is calculated for processing the billable charges created for the bills in the invoice request.
	Note: It has a link. On clicking the link, the **Algorithm** screen appears where you can view the details of the respective algorithm. This field appears only when the **Invoice Mode** is set to **Automatic**.
Approval Required	Indicates whether approval is required for approving the bills generated through the invoice request.
	Note: This field appears only when the **Invoice Mode** is set to**Manual** and the **Bill Generation Type** is set to **Regular**.
Approval To Do Type	Indicates that the To Do task of the specified To Do type must be created when the invoice request is submitted for approval.
	Note: It has a link. On clicking the link, the **To Do Type** screen appears where you can view the details of the respective To Do type. This field appears only when the **Approval Required** option is selected.
Approval To Do Role	Indicates the user and/or group of users who can approve the invoice request.

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Field Name	Field Description
	Note: It has a link. On clicking the link, the **To Do Role** screen appears where you can view the details of the respective To Do role. This field appears only when the **Approval Required** option is selected.
Submitter To Do Type	Indicates that the To Do task of the specified To Do type is created for re-submitting the invoice request for approval.
	Note: It has a link. On clicking the link, the **To Do Type** screen appears where you can view the details of the respective To Do type.
Submitter To Do Role	Indicates the user and/or group of users who can re-submit the invoice request for approval.
	Note: It has a link. On clicking the link, the **To Do Role** screen appears where you can view the details of the respective To Do role.
Wait Days	Displays the maximum wait period (in days) after which the bills of the invoice request are processed.
	Note: You cannot specify a negative value in the **Wait Days** field.

- **Characteristics** - The **Characteristics** section lists the characteristics defined for the invoice request type. It contains the following columns:

Column Name	Column Description
Characteristic Type	Indicates the characteristic type.
Characteristic Value	Displays the value of the characteristic type.

- **Record Actions** - The **Record Actions** section contains the following buttons:

Button Name	Button Description
Edit	Used to edit the details of the invoice request type.
Delete	Used to delete the invoice request type.
	Note: You can delete an invoice request type only when an invoice request is not yet created using the invoice request type.
Duplicate	Used to create a new invoice request type using an existing invoice request type.

- **Record Information** - The **Record Information** section contains the following field:

Field Name	Field Description
Business Object	Indicates the business object using which the invoice request type is created in the system. In addition, the context menu (⊙) icon appears corresponding to this field which helps in navigating to other screens in the application.
	Note: It has a link. On clicking the link, the **Business Object** screen appears where you can view the details of the respective business object.

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By default, the **Invoice Request Type** zone does not appear in the **Invoice Request Type** screen. It appears when you click the **Broadcast** (📡) icon corresponding to an invoice request type in the **Invoice Request Type List** zone.

Related Topics

For more information on...	See...
How to edit an invoice request type	Editing an Invoice Request Type on page 3837
How to copy an invoice request type	Copying an Invoice Request Type on page 3841
How to delete an invoice request type	Deleting an Invoice Request Type on page 3841

Defining an Invoice Request Type

Prerequisites

To define an invoice request type, you should have:

- Invoice request type business object defined in the application.
- Invoice request business objects defined in the application.
- Date calculation algorithm defined using the **C1-INVREDTCA** algorithm type.
- Required To Do role assigned to the **C1-INVRA** and **C1-INVRS** To Do types in the application

Procedure

To define an invoice request type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **I** and then click **Invoice Request Type**.
   A sub-menu appears.
3. Click the **Add** option from the **Invoice Request Type** sub-menu.

   The **Invoice Request Type** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details about the invoice request type.
   - **Characteristics** - Used to define a list of characteristics for the invoice request type.

   The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Invoice Request Type	Used to specify the invoice request type.	Yes
Business Object	Indicates the business object using which you want to define the invoice request type.	Not applicable
Description	Used to specify the description for the invoice request type.	Yes
Invoice Request Business Object	Used to indicate the invoice request business object for which you want to define the invoice request type. The valid values are: • Invoice Request - Regular Bill Generation • Invoice Request - Trial Bill Generation	Yes
Detailed Description	Used to specify additional information about the invoice request type.	No

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Field Name	Field Description	Mandatory (Yes or No)
Status	Used to indicate the current status of the invoice request type. The valid values are: • Active • Inactive	Yes
Invoice Mode	Used to indicate the mode in which the invoice request should be created in the system using the invoice request type. The valid values are: • Automatic **Note:** The automatic mode is not supported while creating an invoice request type for the financial services domain. • Manual	Yes
Bill Generation Type	Used to indicate the type of bill that should be generated for the invoice request in the system using the invoice request type. The valid values are: • Regular • Trial **Note:** By default, this field is set to **Regular** when the **Invoice Mode** is set to **Automatic**.	Yes
Defer Processing Billable Charge Count	Used to specify the count which helps to determine whether the invoice request must be processed in the deferred mode (i.e. in the background) or in real time (i.e. immediately). If the number of billable charges created for the bills which are selected in the invoice request exceeds the defer processing billable charge count, the system processes the invoice request in the deferred mode. However, if the number of billable charges created for the bills which are selected in the invoice request does not exceed the defer processing billable charge count, the system processes the invoice request in real time (i.e. immediately). **Note:** You cannot specify a negative value in this field. Deferred mode means, in the background, when the **Generic Request Periodic Monitor (C1-GENRQ)** batch is invoked. You can configure the **Generic Request Periodic Monitor (C1-GENRQ)** batch such that it is executed at regular intervals. For more information about the **Generic Request Periodic Monitor (C1-GENRQ)** batch, refer to *Oracle Revenue Management and Billing Batch Guide*.	No

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Field Name	Field Description	Mandatory (Yes or No)
Date Calculation Algorithm	Used to indicate the algorithm using which the date is calculated for processing the billable charges created for the bills in the invoice request. **Note:** The **Search** (🔍) icon appears corresponding to the **Date Calculation Algorithm** field. On clicking the **Search** icon, the **Algorithm Search** window appears. On specifying the date calculation algorithm, the description of the date calculation algorithm appears corresponding to the **Date Calculation Algorithm** field. You can specify the date calculation algorithm only when the **Invoice Mode** is set to **Automatic**.	Yes (Conditional) **Note:** This field is required for creating an invoice request in the automatic mode.
Approval Required	Used to indicate whether approval is required for approving the bills generated through the invoice request. **Note:** This field appears only when the **Invoice Mode** is set to**Manual** and the **Bill Generation Type** is set to **Regular**.	No
Approval To Do Type	Used to indicate that the To Do task of the specified To Do type must be created when the invoice request is submitted for approval. **Note:** The **Search** (🔍) icon appears corresponding to the **Approval To Do Type** field. On clicking the **Search** icon, the **To Do Type Search** window appears. On specifying the To Do type, the description of the To Do type appears corresponding to the **Approval To Do Type** field. This field appears only when the **Approval Required** option is selected. The **C1-INVRA** To Do type is shipped with the product. You can use the **C1-INVRA** To Do type or a custom To Do type, if required.	Yes (Conditional) **Note:** This field is required for approving the invoice request which is created using the invoice request type.
Approval To Do Role	Used to indicate the user and/or group of users who can approve the invoice request. **Note:** The list includes only those To Do roles which are associated with the approval To Do type. This field appears only when the **Approval Required** option is selected.	Yes (Conditional) **Note:** This field is required for approving the invoice request which is created using the invoice request type.

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Field Name	Field Description	Mandatory (Yes or No)
Submitter To Do Type	Used to indicate that the To Do task of the specified To Do type is created for re-submitting the invoice request for approval. **Note:** The **Search** (🔍) icon appears corresponding to the **Submitter To Do Type** field. On clicking the **Search** icon, the **To Do Type Search** window appears. On specifying the To Do type, the description of the To Do type appears corresponding to the **Submitter To Do Type** field. The **C1-INVRS** To Do type is shipped with the product. You can use the **C1-INVRS** To Do type or a custom To Do type, if required.	Yes (Conditional) **Note:** This field is required for resubmitting the invoice request for approval.
Submitter To Do Role	Used to indicate the user and/or group of users who can re-submit the invoice request for approval. **Note:** The list includes only those To Do roles which are associated with the submitter To Do type.	Yes (Conditional) **Note:** This field is required for resubmitting the invoice request for approval. Once the it is defined and saved, it cannot be changed as it is linked to request(s) which are under processing.
Wait Days	Used to specify the maximum wait period (in days) after which the bills in the invoice request are processed. **Note:** You cannot specify a negative value in the **Wait Days** field.	No

4. Enter the required details in the **Main** section.
5. Define a list of characteristics for the invoice request type, if required.
6. Click **Save**.
   The invoice request type is defined.

Related Topics

For more information on...	See...
Invoice Request Type screen	Invoice Request Type on page 3828
How to define a characteristic for an invoice request type	Defining a Characteristic for an Invoice Request on page 3864

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Defining a Characteristic for an Invoice Request Type

Prerequisites

To define a characteristic for an invoice request type, you should have:

- Characteristic types defined in the application (where the characteristic entity is set to **Invoice Request Type**)

Procedure

To define a characteristic for an invoice request type:

1. Ensure that the **Characteristics** section is expanded when you *a*re defining, editing, or copying an invoice request type.

   The **Characteristics** section contains the following fields in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Characteristic Type	Used to indicate the characteristic type.	Yes (Conditional)
	Note: The list includes only those characteristic types where the characteristic entity is set to **Invoice Request Type**.	**Note:** This field is required while defining a characteristic for an invoice request type.
Characteristic Value	Used to specify the value for the characteristic type.	Yes (Conditional)
	Note: If you select a predefined characteristic type, the **Search** (🔍) icon appears corresponding to the **Characteristic Value** field. On clicking the **Search** icon, the **Predefined Characteristic Search** window appears. On specifying the value for a predefined characteristic type, the description of the characteristic value appears corresponding to the **Characteristic Value** field.	**Note:** This field is required while defining a characteristic for an invoice request type.

2. Enter the required details in the **Characteristics** section.
3. If you want to define more than one characteristic for the invoice request type, click the **Add** (+) icon and *t*hen repeat step *2*.

Note: However, if you want to remove a characteristic from the invoice request type, click the **Delete** (🗑) icon corresponding to the characteristic.

Related Topics

For more information on...	See...
How to define a invoice request type	Defining an Invoice Request Type on page 3832
How to edit a invoice request type	Editing an Invoice Request Type on page 3837
How to copy a invoice request type	Copying an Invoice Request Type on page 3841

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Editing an Invoice Request Type

Prerequisites

To edit an invoice request type, you should have:

- Invoice request type business object defined in the application.
- Invoice request business objects defined in the application.
- Date calculation algorithm defined using the **C1-INVREDTCA** algorithm type.
- Required To Do role assigned to the **C1-INVRA** and **C1-INVRS** To Do types in the application

Procedure

To edit an invoice request type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **I** and then click **Invoice Request Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Invoice Request Type** sub-menu.
   The **Invoice Request Type** screen appears.
4. In the **Invoice Request Type List** zone, click the **Edit**( ) icon in the **Edit** column corresponding *t*o the invoice request type whose details you want to edit.

   The **Invoice Request Type** screen appears. It contains the following section:

   - **Main** - Used to specify basic details about the invoice request type.
   - **Characteristics** - Used to define a list of characteristics for the invoice request type.

   The **Main** section contains the following fields:

Field Name	**Field Description**	**Mandatory (Yes or No)**
Invoice Request Type	Displays the invoice request type.	Not applicable
Business Object	Indicates the business object using which you want to define the invoice request type.	Not applicable
Description	Used to specify the description for the invoice request type.	Yes
Invoice Request Business Object	Used to indicate the invoice request business object for which you want to define the invoice request type. The valid values are: • Invoice Request - Regular Bill Generation • Invoice Request - Trial Bill Generation	Yes
Detailed Description	Used to specify additional information about the invoice request type.	No
Status	Used to indicate the current status of the invoice request type. The valid values are: • Active • Inactive	Yes
Invoice Mode	Used to indicate the mode in which the invoice request should be created in the system using the invoice request type. The valid values are:	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	• Automatic **Note:** The automatic mode is not supported while creating an invoice request type for the financial services domain. • Manual	
Bill Generation Type	Used to indicate the type of bill that should be generated for the invoice request in the system using the invoice request type. The valid values are: • Regular • Trial **Note:** By default, this field is set to **Regular** when the **Invoice Mode** is set to **Automatic**.	Yes
Defer Processing Billable Charge Count	Used to specify the count which helps to determine whether the invoice request must be processed in the deferred mode (i.e. in the background) or in real time (i.e. immediately). If the number of billable charges created for the bills which are selected in the invoice request exceeds the defer processing billable charge count, the system processes the invoice request in the deferred mode. However, if the number of billable charges created for the bills which are selected in the invoice request does not exceed the defer processing billable charge count, the system processes the invoice request in real time (i.e. immediately). **Note:** You cannot specify a negative value in this field. Deferred mode means, in the background, when the **Generic Request Periodic Monitor (C1-GENRQ)** batch is invoked. You can configure the **Generic Request Periodic Monitor (C1-GENRQ)** batch such that it is executed at regular intervals. For more information about the **Generic Request Periodic Monitor (C1-GENRQ)** batch, refer to *Oracle Revenue Management and Billing Batch Guide*.	No
Date Calculation Algorithm	Used to indicate the algorithm using which the date is calculated for processing the billable charges created for the bills in the invoice request.	Yes (Conditional)

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The **Search** (🔍) icon appears corresponding to the **Date Calculation Algorithm** field. On clicking the **Search** icon, the **Algorithm Search** window appears. On specifying the date calculation algorithm, the description of the date calculation algorithm appears corresponding to the **Date Calculation Algorithm** field. You can specify the date calculation algorithm only when the **Invoice Mode** is set to **Automatic**.	**Note:** This field is required for creating an invoice request in the automatic mode.
Approval Required	Used to indicate whether approval is required for approving the bills generated through the invoice request. **Note:** This field appears only when the **Invoice Mode** is set to**Manual** and the **Bill Generation Type** is set to **Regular**.	No
Approval To Do Type	Used to indicate that the To Do task of the specified To Do type must be created when the invoice request is submitted for approval. **Note:** The **Search** (🔍) icon appears corresponding to the **Approval To Do Type** field. On clicking the **Search** icon, the **To Do Type Search** window appears. On specifying the To Do type, the description of the To Do type appears corresponding to the **Approval To Do Type** field. This field appears only when the **Approval Required** option is selected. The **C1-INVRA** To Do type is shipped with the product. You can use the **C1-INVRA** To Do type or a custom To Do type, if required.	Yes (Conditional) **Note:** This field is required for approving the invoice request which is created using the invoice request type.
Approval To Do Role	Used to indicate the user and/or group of users who can approve the invoice request. **Note:** The list includes only those To Do roles which are associated with the approval To Do type. This field appears only when the **Approval Required** option is selected.	Yes (Conditional) **Note:** This field is required for approving the invoice request which is created using the invoice request type.
Submitter To Do Type	Used to indicate that the To Do task of the specified To Do type is created for re-submitting the invoice request for approval.	Yes (Conditional)

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The **Search** (🔍) icon appears corresponding to the **Submitter To Do Type** field. On clicking the **Search** icon, the **To Do Type Search** window appears. On specifying the To Do type, the description of the To Do type appears corresponding to the **Submitter To Do Type** field. The **C1-INVRS** To Do type is shipped with the product. You can use the **C1-INVRS** To Do type or a custom To Do type, if required.	**Note:** This field is required for resubmitting the invoice request for approval.
Submitter To Do Role	Used to indicate the user and/or group of users who can re-submit the invoice request for approval. **Note:** The list includes only those To Do roles which are associated with the submitter To Do type.	Yes (Conditional) **Note:** This field is required for resubmitting the invoice request for approval. Once the it is defined and saved, it cannot be changed as it is linked to request(s) which are under processing.
Wait Days	Used to specify the maximum wait period (in days) after which the bills in the invoice request are processed. **Note:** You cannot specify a negative value in the **Wait Days** field.	No

Tip: Alternatively, you can access this screen by clicking the **Edit** button in the **Invoice Request Type** zone.

5. Modify the required details in the **Main** section.
6. Define, edit, or remove characteristics from the invoice request type, if required.
7. Click **Save**.
   The changes made to the invoice request type are saved.

Related Topics

For more information on...	See...
Invoice Request Type screen	Invoice Request Type on page 3828
Invoice Request Type List zone	Invoice Request Type List on page 3828
Invoice Request Type zone	Invoice Request Type on page 3829

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For more information on...	See...
How to define a characteristic for an invoice request type	Defining a Characteristic for an Invoice Request Type on page 3836

Deleting an Invoice Request Type

Procedure

To delete an invoice request type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **I** and then click **Invoice Request Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Invoice Request Type** sub-menu.
   The **Invoice Request Type** screen appears.
4. In the **Invoice Request Type List** zone, click the **Delete** (🗑) icon in the **Delete** column corresponding to *t*he invoice request type that you want to delete.

   A message appears confirming whether you want to delete the invoice request type.

   Note: You can delete an invoice request type only when an invoice request is not yet created using the invoice request type.
5. Click **OK**.
   The invoice request type is deleted.

   Tip: Alternatively, you can delete an invoice request type by clicking the **Delete** button in the **Invoice Request Type** zone.

Related Topics

For more information on...	See...
Invoice Request Type screen	Invoice Request Type on page 3828
Invoice Request Type List zone	Invoice Request Type List on page 3828
Invoice Request Type zone	Invoice Request Type on page 3829

Copying an Invoice Request Type

Instead of creating an invoice request type from scratch, you can create a new invoice request type using an existing invoice request type. This is possible through copying an invoice request type. On copying an invoice request type, the details including the characteristics are copied to the new invoice request type. You can then edit the details, if required.

Prerequisites

To copy an invoice request type, you should have:

- Invoice request type (whose copy you want to create) defined in the application.
- Invoice request type business object defined in the application.
- Invoice request business objects defined in the application.
- Date calculation algorithm defined using the **C1-INVREDTCA** algorithm type.
- Required To Do role assigned to the **C1-INVRA** and **C1-INVRS** To Do types in the application

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Procedure

To copy an invoice request type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **I** and then click **Invoice Request Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Invoice Request Type** sub-menu.
   The **Invoice Request Type** screen appears.
4. In the **Invoice Request Type List** zone, click the **Duplicate** (⧉) icon in the **Duplicate** column corresponding to *t*he invoice request type whose copy you want to create.

   The **Invoice Request Type** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details about the invoice request type.
   - **Characteristics** - Used to define a list of characteristics for the invoice request type.

   The **Main** section contains the following fields:

Field Name	**Field Description**	**Mandatory (Yes or No)**
Invoice Request Type	Used to specify the invoice request type.	Yes
Business Object	Indicates the business object using which you want to define the invoice request type.	Not applicable
Description	Used to specify the description for the invoice request type.	Yes
Invoice Request Business Object	Used to indicate the invoice request business object for which you want to define the invoice request type. The valid values are: • Invoice Request - Regular Bill Generation • Invoice Request - Trial Bill Generation	Yes
Detailed Description	Used to specify additional information about the invoice request type.	No
Status	Used to indicate the current status of the invoice request type. The valid values are: • Active • Inactive	Yes
Invoice Mode	Used to indicate the mode in which the invoice request should be created in the system using the invoice request type. The valid values are: • Automatic **Note:** The automatic mode is not supported while creating an invoice request type for the financial services domain. • Manual	Yes
Bill Generation Type	Used to indicate the type of bill that should be generated for the invoice request in the system using the invoice request type. The valid values are: • Regular	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	• Trial **Note:** By default, this field is set to **Regular** when the **Invoice Mode** is set to **Automatic**.	
Defer Processing Billable Charge Count	Used to specify the count which helps to determine whether the invoice request must be processed in the deferred mode (i.e. in the background) or in real time (i.e. immediately). If the number of billable charges created for the bills which are selected in the invoice request exceeds the defer processing billable charge count, the system processes the invoice request in the deferred mode. However, if the number of billable charges created for the bills which are selected in the invoice request does not exceed the defer processing billable charge count, the system processes the invoice request in real time (i.e. immediately). **Note:** You cannot specify a negative value in this field. Deferred mode means, in the background, when the **Generic Request Periodic Monitor (C1-GENRQ)** batch is invoked. You can configure the **Generic Request Periodic Monitor (C1-GENRQ)** batch such that it is executed at regular intervals. For more information about the **Generic Request Periodic Monitor (C1-GENRQ)** batch, refer to *Oracle Revenue Management and Billing Batch Guide*.	No
Date Calculation Algorithm	Used to indicate the algorithm using which the date is calculated for processing the billable charges created for the bills in the invoice request. **Note:** The **Search** (🔍) icon appears corresponding to the **Date Calculation Algorithm** field. On clicking the **Search** icon, the **Algorithm Search** window appears. On specifying the date calculation algorithm, the description of the date calculation algorithm appears corresponding to the **Date Calculation Algorithm** field. You can specify the date calculation algorithm only when the **Invoice Mode** is set to **Automatic**.	Yes (Conditional) **Note:** This field is required for creating an invoice request in the automatic mode.
Approval Required	Used to indicate whether approval is required for approving the bills generated through the invoice request. **Note:** This field appears only when the **Invoice Mode** is set to**Manual** and the **Bill Generation Type** is set to **Regular**.	No

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Field Name	Field Description	Mandatory (Yes or No)
Approval To Do Type	Used to indicate that the To Do task of the specified To Do type must be created when the invoice request is submitted for approval. **Note:** The **Search** (🔍) icon appears corresponding to the **Approval To Do Type** field. On clicking the **Search** icon, the **To Do Type Search** window appears. On specifying the To Do type, the description of the To Do type appears corresponding to the **Approval To Do Type** field. This field appears only when the **Approval Required** option is selected. The **C1-INVRA** To Do type is shipped with the product. You can use the **C1-INVRA** To Do type or a custom To Do type, if required.	Yes (Conditional) **Note:** This field is required for approving the invoice request which is created using the invoice request type.
Approval To Do Role	Used to indicate the user and/or group of users who can approve the invoice request. **Note:** The list includes only those To Do roles which are associated with the approval To Do type. This field appears only when the **Approval Required** option is selected.	Yes (Conditional) **Note:** This field is required for approving the invoice request which is created using the invoice request type.
Submitter To Do Type	Used to indicate that the To Do task of the specified To Do type is created for re-submitting the invoice request for approval. **Note:** The **Search** (🔍) icon appears corresponding to the **Submitter To Do Type** field. On clicking the **Search** icon, the **To Do Type Search** window appears. On specifying the To Do type, the description of the To Do type appears corresponding to the **Submitter To Do Type** field. The **C1-INVRS** To Do type is shipped with the product. You can use the **C1-INVRS** To Do type or a custom To Do type, if required.	Yes (Conditional) **Note:** This field is required for resubmitting the invoice request for approval.
Submitter To Do Role	Used to indicate the user and/or group of users who can re-submit the invoice request for approval.	Yes (Conditional)

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The list includes only those To Do roles which are associated with the submitter To Do type.	**Note:** This field is required for resubmitting the invoice request for approval. Once the it is defined and saved, it cannot be changed as it is linked to request(s) which are under processing.
Wait Days	Used to specify the maximum wait period (in days) after which the bills in the invoice request are processed. **Note:** You cannot specify a negative value in the **Wait Days** field.	No

Tip: Alternatively, you can copy an invoice request type by clicking the **Duplicate** button in the **Invoice Request Type** zone.

5. Enter the required details in the **Main** section.
6. Define, edit, or remove characteristics from the invoice request type, if required.
7. Click **Save**.
   The new invoice request type is defined.

Related Topics

For more information on...	See...
Invoice Request Type screen	Invoice Request Type on page 3828
Invoice Request Type List zone	Invoice Request Type List on page 3828
Invoice Request Type zone	Invoice Request Type on page 3829
How to define a characteristic for an invoice request type	Defining a Characteristic for an Invoice Request Type on page 3836

Viewing the Invoice Request Type Details

Procedure

To view the details of an invoice request type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **I** and then click **Invoice Request Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Invoice Request Type** sub-menu.
   The **Invoice Request Type** screen appears.

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4. In the **Invoice Request Type List** zone, click the **Broadcast** (ᯤ) icon corresponding to the invoice request type whose details you want to view.
   The **Invoice Request Type** zone appears.
5. View the details of the invoice request type in the **Invoice Request Type** zone.

Related Topics

For more information on...	See...
Invoice Request Type screen	Invoice Request Type on page 3828
Invoice Request Type List zone	Invoice Request Type List on page 3828
Invoice Request Type zone	Invoice Request Type on page 3829

Invoice Request (Used for Searching)

The **Invoice Request** screen allows you to search for an invoice request using various search criteria. It also allows you to manually create an invoice request. It contains the following zone:

- Search Invoice Request on page 3846

Through this screen, you can navigate to the following screen:

- Invoice Request (Used for Viewing) on page 3854

Search Invoice Request

The **Search Invoice Request** zone allows you to search for an invoice request using various search criteria. It contains the following two sections:

- **Search Criteria** - The **Search Criteria** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Search By	Used to indicate whether you want to search for an invoice request created for an account or a person. The valid values are: • Invoice Requests for Accounts • Invoice Requests for Persons **Note:** By default, the **Invoice Requests for Accounts** option is selected.	Yes
Invoice Request ID	Used to search a particular invoice request.	No
Creation From Date	Used to search invoice requests which are created from a particular date onwards.	No

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Field Name	Field Description	Mandatory (Yes or No)
	Note: You can either manually specify the date or select it using the **Date Picker** (📅) icon corresponding to the field. The **Creation From Date** cannot be later than the **Created To** date.	
Created To	Used to search invoice requests which are created till a particular date. **Note:** You can either manually specify the date or select it using the **Date Picker** (📅) icon corresponding to the field. The **Created To** date cannot be earlier than the **Creation From Date**.	No
Cutoff From	Used to indicate the date from when the billable charges are considered for processing the invoice request. **Note:** You can either manually specify the date or select it using the **Date Picker** (📅) icon corresponding to the field. The cutoff from date cannot be later than the cutoff to date.	No
Cutoff To	Used to indicate the date till when the billable charges are considered for processing the invoice request. **Note:** You can either manually specify the date or select it using the **Date Picker** (📅) icon corresponding to the field. The cutoff to date cannot be earlier than the cutoff from date.	No
Invoice Request Type	Used to search invoice requests which are created using a particular invoice request type.	No
Status	Used to search invoice requests which are in a particular status. The valid values are: • Account Derivation Pending • Approved • Approval In Progress • Canceled	No

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Field Name	Field Description	Mandatory (Yes or No)
	• Deferred Processing • Deferred Processing Batch • Draft • Error • Processed • Rejected	
Person ID	Used to search invoice requests which include bills of a particular person. **Note:** The **Search** (🔍) icon appears corresponding to the **Person ID** field. On clicking the **Search** icon, the **Person Search** window appears where you can search for a particular person.	No
Account ID	Used to search invoice requests which include bills of a particular account. **Note:** The **Search** (🔍) icon appears corresponding to the **Account ID** field. On clicking the **Search** icon, the **Account Search** window appears where you can search for a particular account. This field appears only when the **Invoice Requests for Accounts** option is selected from the **Search By** list.	No
Bill Generation Type	Used to indicate the bill generation type using which the bills of the invoice request are created in the system. The valid values are: • Regular • Trial	No
External Reference Type	Used to indicate the external reference type using which the invoice request is created in the system. The valid values are: • Membership • Policy **Note:** This field appears only when the **Invoice Requests for Accounts** option is selected from the **Search By** list. This field is not applicable for the banking business.	No
External Reference ID	Used to specify the external reference ID of the account for which the invoice request is created in the system.	Yes (Conditional)

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The **Search** (🔍) icon appears corresponding to the **External Reference ID** field. On clicking the **Search** icon, the **Search Membership** or the **Search Policy** window appears depending upon the option selected from the **External Reference Type** list. This field appears only when the **Invoice Requests for Accounts** option is selected from the **Search By** list. This field is not applicable for the banking business.	This field is required when you specify the external reference type.

Note: You must specify at least one search criterion while searching for an invoice request.

- **Search Results** - On clicking the **Search** button, the search results appear based on the specified search criteria. The **Search Results** section contains the following columns:

Column Name	Column Description
Creation Date Time	Displays the date and time when the invoice request is created in the system.
Invoice Request Information	Displays information about the invoice request. **Note:** It has a link. On clicking the link, the **Invoice Request** screen appears where you can view the details of the respective invoice request.
Created By	Indicates the user who has created the invoice request.
Cutoff Date	Displays the date till when all the billable charges are considered for processing the invoice request.
Account Information	Displays information about the account for which the invoice request is processed in the system. In addition, this column has a context menu (⊙) which helps in navigating to other screens in the application. **Note:** It has a link. On clicking the link, the **Account** screen appears where you can view the details of the respective account. This column appears only when the **Invoice Requests for Accounts** option is selected from the **Search By** list.
Person Information	Displays information about the person for whose accounts the invoice request is processed in the system. In addition, this column has a context menu (⊙) which helps in navigating to other screens in the application. **Note:** It has a link. On clicking the link, the **Person** screen appears with the details of the respective person. This column appears when the **Invoice Requests for Persons** option is selected from the **Search By** list.

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<table>
<tr><th>Column Name</th><th>Column Description</th></tr>
<tr><td>Status</td><td>Indicates the current status of the invoice request. The valid values are:
Account Derivation Pending
Approved
Approval In Progress
Canceled
Deferred Processing
Deferred Processing - Batch
Draft
Error
Processed
Rejected</td></tr>
<tr><td>Bill Information</td><td>Displays information about the bill. In addition, this column has a context menu (⊙) which helps in navigating to other screens in the application.
Note:<table><tr><th>If you select ...</th><th>Then...</th></tr><tr><td rowspan="2">Invoice Requests for Accounts option from the Search By list andRegular option from the Bill Generation Type list.</td><td>This column has a link. On clicking the link, the Bill screen appears where you can view the details of the respective bill.</td></tr><tr><td>Note: In addition, this column has a context menu (⊙) icon appears corresponding to this column which helps in navigating to other screens in the application.</td></tr><tr><td>Invoice Requests for Accounts option from the Search By list andTrial option from the Bill Generation Type list.</td><td>This column has a link. On clicking the link, the Trial Bill screen appears where you can view the details of the respective trial bill.</td></tr></table>This column appears only when the Invoice Requests for Accounts option is selected from the Search By list.</td></tr>
<tr><td>Error Message</td><td>Displays the error message indicating the error that occurred while processing the bills in the invoice request.
Note: This column appears when the Invoice Requests for Accounts option is selected from the Search By list.</td></tr>
<tr><td>Bill Generation Type</td><td>Indicates the bill generation type using which the bills of the invoice request are created in the system. The valid values are:
Regular
Trial
Note: This column appears when the Invoice Requests for Accounts option is selected from the Search By list.</td></tr>
</table>

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> **Note:** Pagination is used to display limited number of records in the **Search Results** section. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

Related Topics

For more information on...	See...
How to search for an invoice request	Searching for an Invoice Request on page 3851

Searching for an Invoice Request

Prerequisites

To search for an invoice request, you should have:

- Invoice requests defined in the application

Procedure

To search for an invoice request:

1. Click the **Menu** link in the **Application** toolbar.
   A list appears.
2. From the **Main** menu, select **Billing Management** and then click **Invoice Request**.
   A sub-menu appears.
3. Click the **Search** option from the **Invoice Request** sub-menu.
   The **Invoice Request** screen appears.
4. Enter the search criteria in the **Search Invoice Request** zone.

> **Note:** ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.

5. Click **Search**.
   A list of invoice requests that meet the search criteria appears in the **Search Results** section.

Related Topics

For more information on...	See...
Invoice Request screen	Invoice Request (Used for Searching) on page 3846
Search Invoice Request zone	Search Invoice Request on page 3846

Manually Creating an Invoice Request

Prerequisites

To manually create an invoice request, you should have:

- Invoice request types defined in the application
- Entity (i.e., person or account for which you want to create the invoice request) defined in the application
- Bills generated for the entity (i.e., person or account) in the application

Procedure

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To manually create an invoice request:

1. Click the **Menu** link in the **Application** toolbar.
   A list appears.
2. From the **Main** menu, select **Billing Management** and then click **Invoice Request**.
   A sub-menu appears.
3. Click the **Add** option from the **Invoice Request** sub-menu.

   The **Add Invoice Request** window appears. It contains the following field:

Field Name	Field Description	Mandatory (Yes or No)
Invoice Request Type	Used to indicate the invoice request type using which you want to create the invoice request in the system.	Yes

4. Select the required invoice request type from the **Invoice Request Type** list.
5. Click **OK**.

   The **Invoice Request** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details about the invoice request.
   - **Characteristics** - Used to define a list of characteristics for the invoice request.

   The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Invoice Request Type	Indicates the invoice request type using which you want to create the invoice request.	Not applicable
Entity	Used to indicate the entity for which you want to create the invoice request. The valid values are: • Account • Person **Note:** By default, the **Account** option is selected.	Yes
Account ID	Used to indicate the invoice request which includes the bills of a particular account. **Note:** The **Search** (🔍) icon appears corresponding to the **Account ID** field. On clicking the **Search** icon, the **Account Search** window appears where you can search for the respective account. This field appears only when you select the **Account** option from the **Entity** list.	Yes (Conditional) This field is required while specifying the account for which you want to create the invoice request.
Person ID	Used to indicate the invoice request which includes the bills of a particular person.	Yes (Conditional) This field is required while specifying the

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The **Search** (🔍) icon appears corresponding to **Person ID** field. On clicking the **Search** icon, the **Person Search** window appears where you can search for the respective person. This field appears only when you select the **Person** option from the **Entity** list.	person for whose accounts you want to create the invoice request.
Include Person Hierarchy	Used to specify whether you want to include the accounts of all the child persons of the main person for creating the invoice request. **Note:** This field appears when you select the **Person** option from the **Entity** list.	No
Cutoff Date	Used to specify the date till when all the billable charges are considered for processing the invoice request. **Note:** By default, the current date appears in this field. You can either manually specify the date or select it using the **Date Picker** (📅) icon corresponding to the field.	No
Accounting Date	Used to specify the accounting date for which the financial transaction of the bill is created. **Note:** By default, the current date appears in this field. You can either manually specify the date or select it using the **Date Picker** (📅) icon corresponding to the field.	No
Bill Date	Used to specify the date on which the bill is generated for the entity. **Note:** The bill date cannot be on or earlier than the last bill date of the account. By default, the current date appears in this field. You can either manually specify the date or select it using the **Date Picker** (📅) icon corresponding to the field.	No
Comments	Used to specify additional information about the invoice request.	No

6. Enter the required details in the **Main** section.
7. Define a list of characteristics for the invoice request in the **Characteristics** section, if required.
8. Click **Save**

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The invoice request is created in the **Draft** status and the status of all the records (in the invoice request) is set to **Pending**.

Tip: Alternatively, you can access this screen by clicking the **Add** button in the **Page Title** area of the **Invoice Request** screen.

Related Topics

For more information on...	See...
Invoice Request screen	Invoice Request (Used for Searching) on page 3846
How to define a characteristic for an invoice request	Defining a Characteristic for an Invoice Request on page 3864

Viewing the Invoice Request Details

Procedure

To view the details of an invoice request:

1. Search for the invoice request in the **Invoice Request Search** screen.
2. In the **Search Results** section, click the link in the **Invoice Request Information** column corresponding to *t*he invoice request whose details you want to view.
   The **Invoice Request** screen appears.
3. Ensure that the **Main** tab is selected.
4. View the details of the invoice request in the **Invoice Request** zone.

Related Topics

For more information on...	See...
How to search for an invoice request	Invoice Request (Used for Searching) on page 3846
Invoice Request screen	Invoice Request (Used for Viewing) on page 3854
Invoice Request zone	Invoice Request on page 3855

Invoice Request (Used for Viewing)

The **Invoice Request** screen allows you to:

- View the details of the invoice request
- Edit the details of the invoice request
- Delete the invoice request
- Submit the invoice request for processing
- Approve or reject the invoice request
- Cancel the invoice request
- View the log of the invoice request
- Add a log entry for the invoice request

The **Invoice Request** screen contains the following tabs:

- Invoice Request - Main on page 3855
- Invoice Request - Log on page 3861

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Invoice Request - Main

The **Main** tab displays information about the invoice request. It contains the following zones:

- Invoice Request on page 3855
- Invoice Request Details on page 3859
- Account List on page 3860
- Excluded Accounts on page 3861

Invoice Request

The **Invoice Request** zone displays the details of the invoice request. It contains the following sections:

- **Main** - The **Main** section displays basic information about the invoice request. It contains the following fields:

Field Name	Field Description
Invoice Request Information	Displays information about the invoice request.
Invoice Request Type	Indicates the invoice request type using which the invoice request is created in the system. **Note:** It has a link. On clicking the link, the **Invoice Request Type** screen appears where you can view the details of the respective invoice request type.
Entity	Indicates the entity for which the invoice request is created in the system. The valid values are: • Account • Person
Account Information	Displays information about the account for which the invoice request is created in the system. **Note:** It has a link. On clicking the link, the **Account** screen appears where you can view the details of the respective account. This field appears only when you are viewing the invoice request details of an account.
Person Information	Displays information about the person for whose accounts the invoice request is created in the system. **Note:** It has a link. On clicking the link, the **Person** screen appears where you can view the details of the respective person. This field appears only when you are viewing the invoice request details of a person.
Include Person Hierarchy	Indicates whether the accounts of the child persons of the main person are included for processing the invoice request.

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Field Name	Field Description
	Note: This field appears only when you are viewing the invoice request details of a person.
Cutoff Date	Displays the date till when all the billable charges are considered for processing the invoice request.
Accounting Date	Displays the accounting date for which the financial transaction of the bill is created.
Bill Date	Displays the date on which the bill is generated. **Note:** The bill date must not be equal to or earlier than the last bill date of the account for which the invoice request is generated.
Processing Date	Indicates the date when the invoice request is processed. **Note:** `Processing Date = Invoice Request Creation Date + ' Wait Day + Work Days`
Status	Indicates the current status of the invoice request. The valid values are: • Account Derivation Pending • Approved • Approval In Progress • Cancelled • Deferred Processing • Deferred Processing - Batch • Draft • Error • Processed • Rejected • Submitted • Processing • Return to Submitter
Status Reason	Indicates the reason why the status of the invoice request is changed. **Note:** It has a link. On clicking the link, the **Status Reason** screen appears where you can view the details of the respective status. This field appears only when you select **canceled** option from the status list.
Comments	Displays additional information about the invoice request. **Note:** This field appears only when the invoice request is in the **Processed** status.

- **Characteristics** - The **Characteristics** section lists the characteristics defined for the invoice request. It contains the following columns:

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Column Name	Column Description
Effective Date	Displays the date from when the characteristic is effective for the invoice request.
Characteristic Type	Indicates the characteristic type.
Characteristic Value	Displays the value of the characteristic type.

- **Record Actions** - The **Record Actions** section contains the following buttons:

Button Name	Button Description
Edit	Used to edit the details of the invoice request. **Note:** The **Edit** button appears only when the invoice request is in the **Draft** status.
Delete	Used to delete the invoice request. **Note:** The **Delete** button appears only when the invoice request is in the **Draft** status.
Submit	Used to submit the invoice request for approval. **Note:** The **Submit** button appears only when the invoice request is in the **Draft** status.
Cancel	Used to cancel the invoice request. **Note:** The **Cancel** button appears when the invoice request is in the **Deferred Processing Batch** status.
Approve	Used to approve the invoice request. **Note:** The **Approve** button appears when: • The invoice request is in the **Approval In Progress** status. • A user with the approval To Do role is reviewing the invoice request.
Reject	Used to reject the invoice request. **Note:** The **Reject** button appears when: • The invoice request is in the **Approval In Progress** status. • A user with the approval To Do role is reviewing the invoice request.
Re Submit	Used to request the user for resubmitting the invoice request for approval. **Note:** The **Re Submit** button appears when: • The invoice request is in the **Approval In Progress** status. • A user with the approval To Do role is reviewing the invoice request.

- **Record Information** - The **Record Information** section contains the following fields:

Field Name	Field Description
Business Object	Indicates the business object using which the invoice request is created in the system. In addition, this column has a context menu (⊙) icon appears

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Field Name	Field Description
	corresponding to this column which helps in navigating to other screens in the application. **Note:** It has a link. On clicking the link, the **Business Object** screen appears where you can view the details of the respective business object.
Status Date/Time	Displays the date and time when the invoice request status is updated.
Create Date/Time	Displays the date and time when the invoice request is created.

- **External Reference** - The **External Reference** section lists the external references using which the invoice request is created in the system. It contains the following columns:

Column Name	Column Description
External Reference Type	Indicates the external reference type using which the invoice request is created for the external references. The valid values are: • Membership • Policy **Note:** The value in this field appears only when you are viewing the invoice request details of an account which belongs to the health insurance business and is created using an external reference.
External Reference Information	Displays information about the external reference for the invoice request. **Note:** It has a link. On clicking the link, the **Policy** screen appears with the details of the respective policy. The value in this field appears only when you are viewing the invoice request details of an account which belongs to the health insurance business and is created using an external reference.

- **Statistics** - The **Statistics** section displays information about the records generated while processing the invoice request. It contains the following fields:

Field Name	Field Description
Total Records	Displays the total number of records that were considered for processing the invoice request.
Processed Records	Displays the number of records that were processed while processing the invoice request.
Total Bills Created	Displays the total number of bills generated for the accounts considered for processing the invoice request.
Excluded Records	Displays the number of records that were excluded from the invoice request generation process.
Error Records	Displays the number of records which are in the error status.
Processing Records	Displays the number of records in the invoice request which are still under the generation process.
Pending Records	Displays the number of records that are pending to be processed for the invoice request generation process.

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Related Topics

For more information on...	See...
How to edit an invoice request	Editing an Invoice Request on page 3862
How to delete an invoice request	Deleting an Invoice Request on page 3865
How to submit an invoice request	Submitting an Invoice Request on page 3867
How to cancel an invoice request	Canceling an Invoice Request on page 3866
How to approve an invoice request	Approving an Invoice Request on page 3868
How to reject an invoice request	Rejecting an Invoice Request on page 3869
How to request the user to resubmit an invoice request for approval	Requesting the Submitter to Resubmit the Invoice Request for Approval on page 3870

Invoice Request Details

The **Invoice Request Details** zone lists the persons whose accounts are added to the invoice request. It contains the following columns:

Column Name	Column Description
Person Information	Indicates the person for which the invoice request is created. In addition, this column has a context menu (⊙) icon appears corresponding to this column which helps in navigating to other screens in the application. **Note:** It has a link. On clicking the link, the **Person** screen appears where you can view the details of the respective person.
Record Status	Indicates the status of the bills in the invoice request. The valid values are: • Pending • Error • Processing
Bill Information	Indicates the bill which is added to the invoice request. In addition, this column has a context menu (⊙) icon appears corresponding to this column which helps in navigating to other screens in the application. **Note:** It has a link. On clicking the link, the **Bill** screen appears where you can view the details of the respective bill.
Error Message	Displays the error message indicating the error that occurred while processing the bills in the invoice request.
Recent Billed Date	Displays the date of the bill that has been recently processed from the invoice request.

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Note:

Pagination is used to display limited number of records in this zone. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

The **Filter** icon appears when the zone is **Account List**.

You can filter the list using various search criteria (such as, **Record Status**, **Account ID**, and **Person ID**) available in the **Filter** area. By default, the **Filter** area is hidden. You can view the **Filter** area by clicking the **Filters** (▽) icon in the upper right corner of this zone.

Account List

The **Account List** zone lists the accounts of the entity whose bills are considered for creating the invoice request. It contains the following columns:

Column Name	Column Description
Account Information	Indicates the account for which the invoice request is created in the system. In addition, this column has a context menu (⊙) which helps in navigating to other screens in the application.
	Note: It has a link. On clicking the link, the **Account** screen appears where you can view the details of the respective account.
Person Information	Indicates the person for which the invoice request is created in the system. In addition, this column has a context menu (⊙) which helps in navigating to other screens in the application.
	Note: It has a link. On clicking the link, the **Person** screen appears where you can view the details of the respective person.
Record Status	Indicates the status of the bills in the invoice request. The valid values are: • Pending • Error • Processing
Bill Information	Indicates the bill which is added to the invoice request. In addition, this column has a context menu (⊙) which helps in navigating to other screens in the application.
	Note: It has a link. On clicking the link, the **Bill** screen appears where you can view the details of the respective bill.
Error Message	Displays the error message indicating the error that occurred while processing the bills in the invoice request for the account.
Recent Billed Date	Displays the date of the bill that has been recently processed from the invoice request for the account.

A check-box appears corresponding to each account when the invoice request is in the **Draft** status. On selecting the check-box, and clicking the **Exclude** button, you can exclude the account from the invoice request process. You can also select multiple accounts at the same time. In addition, you can select the check box corresponding to the column header to exclude all the accounts from the invoice request process.

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Note:

Pagination is used to display limited number of records in this zone. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

You can filter the list using various search criteria (such as, **Record Status**, **Account ID**, and **Person ID**) available in the **Filter** area. By default, the **Filter** area is hidden. You can view the **Filter** area by clicking the **Filters** (▽) icon in the upper right corner of this zone.

Excluded Accounts

The **Excluded Accounts** zone lists the accounts of the main person whose bills are not considered for processing the invoice request. It contains the following columns:

Column Name	Column Description
Account Information	Indicates the account whose bills are excluded from the invoice request process. In addition, this column has a context menu (⊙) which helps in navigating to other screens in the application.
	Note: It has a link. On clicking the link, the **Account** screen appears where you can view the details of the respective account.
Person Information	Indicates the person to which the account belongs. In addition, this column has a context menu (⊙) which helps in navigating to other screens in the application.
	Note: It has a link. On clicking the link, the **Person** screen appears where you can view the details of the respective person.

A check-box appears corresponding to each account when the invoice request is in the **Draft** status. On selecting the check-box, and clicking the **Include** button, you can include the account to the invoice request process. You can also select multiple accounts at the same time. In addition, you can select the check box corresponding to the column header to include all the accounts of the person to the invoice request process.

Note:

Pagination is used to display limited number of records in this zone. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

You can filter the list using various search criteria (such as, **Record Status**, **Account ID**, and **Person ID**) available in the **Filter** area. By default, the **Filter** area is hidden. You can view the **Filter** area by clicking the **Filters** (▽) icon in the upper right corner of this zone.

The **Excluded Accounts** zone appears when **Invoice Requests for Persons** option is selected from the **Search By list** in the **Search Invoice Request** zone.

Invoice Request - Log

The **Log** tab contains the following zone:

- Invoice Request Log on page 3861

Invoice Request Log

The **Invoice Request Log** zone lists the complete trail of actions performed on the invoice request. It contains the following columns:

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Column Name	Column Description
Creation Date/Time	Displays the date and time when the action was performed on the invoice request.
Details	Displays the details of the action performed on the invoice request.
User	Indicates the user who has performed the action on the invoice request.
Log Type	Indicates the type of log.
Related Object	Indicates the object or entity which is created when the action is performed on the invoice request.
	Note: At present, no data appears in this column. The implementation team can build the custom logic to meet the business requirements.
Status Reason	Indicates the reason why the status of the invoice request was changed.

Note: You can manually add a log entry for the invoice request by clicking the **Add Log Entry** link in the upper right corner of the **Invoice Request Log** zone.

Related Topics

For more information on...	See...
How to view the log of a invoice request	Viewing the Log of an Invoice Request on page 3872
How to add a log entry for an invoice request	Adding a Log Entry for an Invoice Request on page 3872

Editing an Invoice Request

Prerequisites

To edit an invoice request, you should have:

- Invoice request types defined in the application
- Bills created in the application
- Account and Person entities defined in the application

Procedure

To edit an invoice request:

1. Search for the invoice request in the **Invoice Request** screen.
2. In the **Search Results** section, click the link in the **Invoice Request Information** column corresponding to *t*he invoice request whose details you want to edit.
   The **Invoice Request** screen appears.
3. Click the **Edit** button in the **Invoice Request** zone.

   The **Invoice Request** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details about the invoice request.
   - **Characteristics** - Used to define a list of characteristics for the invoice request.

   The **Main** section contains the following fields:

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Field Name	Field Description	Mandatory (Yes or No)
Invoice Request Information	Displays information about the invoice request.	Not applicable
Invoice Request Type	Indicates the invoice request type using which the invoice request is created in the system.	Not applicable
Entity	Indicates the entity for which the invoice request is created in the system. The valid values are: • Account • Person	Not applicable
Account ID	Used to edit the invoice request which includes the bills of a particular account. **Note:** The **Search** (🔍) icon appears corresponding to the **Account ID** field. On clicking the **Search** icon, the **Account Search** window appears where you can search for the respective account. This field appears only when the **Account** option is selected from the **Entity** list.	Yes
Person ID	Used to edit the invoice request which includes the bills of a particular person. **Note:** The **Search** (🔍) icon appears corresponding to **Person ID** field. On clicking the **Search** icon, the **Person Search** window appears where you can search for the respective person. This field appears only when the **Person** option is selected from the **Entity** list.	Yes
Include Person Hierarchy	Used to specify whether you want to include the accounts of all the child persons of the main person for creating the invoice request. **Note:** This field appears only when the **Person** option is selected from the **Entity** list.	No
Cutoff Date	Used to specify the date till when all the billable charges are considered for processing the invoice request. **Note:** You can either manually specify the date or select it using the **Date Picker** (📅) icon corresponding to the field.	No
Accounting Date	Used to specify the accounting date for which the financial transaction of the bill is created.	No

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Field Name	Field Description	Mandatory (Yes or No)
	Note: You can either manually specify the date or select it using the **Date Picker** (📅) icon corresponding to the field.	
Bill Date	Used to specify the date on which the bill is generated for the entity. **Note:** The bill date cannot be on or earlier than the last bill date of the account. You can either manually specify the date or select it using the **Date Picker** (📅) icon corresponding to the field.	No
Processing Date	Displays the date when the invoice request is processed in the system.	No
Comments	Used to specify additional information about the invoice request.	No

Note: The **Edit** button appears when the invoice request is in the **Draft** status.

4. Modify the details of the invoice request, if required.
5. Define, edit, or remove characteristics from the invoice request, if required.
6. Click **Save**.
   The changes made to the invoice request are saved.

Related Topics

For more information on...	See...
How to search for an invoice request	Searching for an Invoice Request on page 3851
Invoice Request screen	Invoice Request (Used for Viewing) on page 3854
Invoice Request zone	Invoice Request on page 3855
How to define a characteristic for an invoice request	Defining a Characteristic for an Invoice Request on page 3864

Defining a Characteristic for an Invoice Request

Prerequisites

To define a characteristic for an invoice request, you should have:

- Characteristic types defined in the application (where the characteristic entity is set to **Invoice Request**)

Procedure

To define a characteristic for an invoice request:

1. Ensure that the **Characteristics** section is expanded when you *a*re manually creating or editing an invoice request.

   The **Characteristics** section contains the following fields in a grid:

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Field Name	Field Description	Mandatory (Yes or No)
Effective Date	Used to specify the date from when the characteristic is effective for the invoice request. **Note:** You can either manually specify the date or select it using the **Date Picker** (📅) icon corresponding to the field.	Yes (Conditional) **Note:** This field is required when you are defining a characteristic for the invoice request.
Characteristic Type	Used to indicate the characteristic type. **Note:** The list includes only those characteristic types where the characteristic entity is set to **Invoice Request**.	Yes (Conditional) **Note:** This field is required when you are defining a characteristic for the invoice request.
Characteristic Value	Used to specify the value for the characteristic type. **Note:** If you select a predefined characteristic type, the **Search** (🔍) icon appears corresponding to the **Characteristic Value** field. On clicking the **Search** icon, you can search for a predefined characteristic value. On specifying the value for a predefined characteristic type, the description of the characteristic value appears corresponding to the **Characteristic Value** field.	Yes (Conditional) **Note:** This field is required when you are defining a characteristic for the invoice request.

2. Enter the required details in the **Characteristics** section.
3. If you want to define more than one characteristic for the invoice request, click the **Add** (+) icon and then *r*epeat step *2*.

Note: However, if you want to remove a characteristic from the invoice request, click the **Delete** (🗑) icon corresponding to the characteristic.

4. Click **Save**.
   The characteristic is defined for the invoice request.

Related Topics

For more information on...	See...
How to manually create an invoice request	Manually Creating an Invoice Request on page 3851
How to edit an invoice request	Editing an Invoice Request on page 3862

Deleting an Invoice Request

Procedure

To delete an invoice request:

1. Search for the invoice request in the **Invoice Request** screen.

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2. In the **Search Results** section, click the link in the **Invoice Request Information** column corresponding to *t*he invoice request that you want to delete.
   The **Invoice Request** screen appears.
3. Click the **Delete** button in the **Invoice Request** zone.
   A message appears confirming whether you want to delete the invoice request.

> **Note:** The **Delete** button appears when the invoice request is in the **Draft** status.

4. Click **OK**.
   The invoice request is deleted.

Related Topics

For more information on...	See...
How to search for an invoice request	Searching for an Invoice Request on page 3851
Invoice Request screen	Invoice Request (Used for Viewing) on page 3854
Invoice Request zone	Invoice Request on page 3855

Canceling an Invoice Request

Prerequisites

To cancel an invoice request, you should have:

- Reasons defined for the **Canceled** status of the **C1-InvoiceRequest** business object in the **Status Reason** screen

Procedure

To cancel an invoice request:

1. Search for the invoice request in the **Invoice Request** screen.
2. In the **Search Results** section, click the link in the **Invoice Request Information** column corresponding to *t*he invoice request that you want to cancel.
   The **Invoice Request** screen appears.
3. Click the **Cancel** button in the **Invoice Request** zone.

   The **Invoice Request** window appears. It contains the following field:

Field Name	Field Description	Mandatory (Yes or No)
Status Reason	Used to indicate the reason why you want to cancel the invoice request. **Note:** The list includes only those reasons which are defined for the **Canceled** status of the **C1-InvoiceRequest** business object in the **Status Reason** screen.	Yes

> **Note:** The **Cancel** button appears when the invoice request is in the **Deferred Processing** or **Deferred Processing - Batch** status.

4. Select the reason for canceling the invoice request from the **Status Reason** list.
5. Click **Save**.
   The status of the invoice request (along with the bills within the invoice request) is changed to **Canceled**.

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Related Topics

For more information on...	See...
How to search for an invoice request	Searching for an Invoice Request on page 3851
Invoice Request screen	Invoice Request (Used for Viewing) on page 3854
Invoice Request zone	Invoice Request on page 3855

Submitting an Invoice Request

Prerequisites

To submit an invoice request, you should have:

- The status of the invoice request in the **Draft** status.
- The invoice request type as **Manual**.

Procedure

To submit an invoice request:

1. Search for the invoice request in the **Invoice Request** screen.
2. In the **Search Results** section, click the link in the **Invoice Request Information** column corresponding to *t*he invoice request that you want to submit.
   The **Invoice Request** screen appears.
3. Click the **Submit** button in the **Invoice Request** zone.

   The system behaves in the following manner:

If...	Then...
The **Approval Required** option is selected in the respective invoice request type	The status of the invoice request is changed to **Approval In Progress**. In this status, you can perform various actions on the invoice request, such as, **Approve** or **Reject** or **Return To Submitter**. If the approver clicks the **Approve** button, the status of the invoice request is changed to **Approved**. If the approver clicks the **Reject** button, the status of the invoice request is changed to **Rejected**. If the approver clicks the **Return To Submitter** button, a To Do is generated and the invoice request status is changed to **Draft**. The submitter updates the invoice request and redirects it back to the approver for approval purposes.
The **Approval Required** option is not selected in the respective invoice request type and the entity type is **Person**	The status of the invoice request is changed to **Processed**, or **Deferred Processing** or **Deferred Processing Batch**.
The **Approval Required** option is not selected in the respective invoice request type, and the entity type is **Account**, and the billable charge count exceeds the defer processing billable charge count	The status of the invoice request is changed to **Deferred Processing Batch**.
The **Approval Required** option is not selected in the respective invoice request type, and the entity type is **Account**, and the billable charge count does not exceed the defer processing billable charge count, and	The status of the invoice request is changed to **Processed** else it is changed to **Deferred Processing**.

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If...	Then...
the invoice processing date does not exceed the system date	

Note:

The **Submit** button appears when the invoice request is in the **Draft** status and invoice request type is **Manual**.

Related Topics

For more information on...	See...
How to search for an invoice request	Searching for an Invoice Request on page 3851
Invoice Request screen	Invoice Request (Used for Viewing) on page 3854
Invoice Request zone	Invoice Request on page 3855

Approving an Invoice Request

You can view the number of invoice requests which are pending for approval in the **Invoice Request** screen. The approver can review, and accordingly approve, reject, or ask the submitter to resubmit the invoice request based on the observations.

Note: The system will not allow you to approve, reject, or resubmit an invoice request submitted by you.

Prerequisites

To approve an invoice request, you should have:

- Approval To Do role assigned in the system

Procedure

To approve an invoice request:

1. Do either of the following:

If you want to...	Then...
Approve an invoice request through the Invoice Request screen	**a.** Search for the invoice request in the **Invoice Request** screen. **b.** In the **Search Results** section, click the link in the **Invoice Request Information** column corresponding to the invoice request which you want to review.
Approve an Invoice request from the To Do List screen	**a.** Click the **Menu** link in the **Application** toolbar. A list appears. **b.** From the **Main** menu, select **To Do** and then click **To Do List**. The **To Do Type for User Search** window appears. **c.** Enter **C1-INVRATODO** in the **To Do Type** field. **d.** Click the **Search** button corresponding to the **To Do Type** field. The **To Do List** screen appears. **e.** Select the **Open** option from the **Filter by** list to view all unassigned To Dos. **f.** Click the link in the **Message** column corresponding to the To Do of the invoice request that you want to review.

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The **Invoice Request** screen appears.

2. Review the details in the **Invoice Request** screen.
3. If the information in the invoice request is accurate, then click the **Approve** button in the **Invoice Request** zone.

   The system behaves in the following manner:

If...	Then...
The status of the invoice request is changed to **Approved**	A To Do entry is created using the To Do type **F1-TODOCOMPL** specified in the approval profile and is assigned back to the submitter to complete the invoice request.

Note: The **Approve** button appears when:

- The invoice request is in the **Approval In Progress** status.
- A user with the approval To Do role is reviewing the invoice request.

Related Topics

For more information on...	See...
How to search for an invoice request	Searching for an Invoice Request on page 3851
Invoice Request screen	Invoice Request (Used for Viewing) on page 3854
Invoice Request zone	Invoice Request on page 3855

Rejecting an Invoice Request

Prerequisites

To reject an invoice request, you should have:

- Reasons defined for the **Rejected** status of the **C1-InvoiceRequest** business object in the **Status Reason** screen.

Note: The system will not allow you to approve, reject, or resubmit an invoice request submitted by you.

Procedure

To reject an invoice request:

1. Do either of the following:

If you want to...	Then...
Reject an invoice request through the Invoice Request screen	**a.** Search for the invoice request in the **Invoice Request** screen. **b.** In the **Search Results** section, click the link in the **Invoice Request Information** column corresponding to the invoice request which you want to review.
Reject an invoice request from the To Do List screen	**a.** Click the **Menu** link in the **Application** toolbar. A list appears. **b.** From the **Main** menu, select **To Do** and then click **To Do List**. The **To Do Type for User Search** window appears. **c.** Enter **C1-INVRATODO** in the **To Do Type** field.

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If you want to...	Then...
	d. Click the **Search** button corresponding to the **To Do Type** field. The **To Do List** screen appears. **e.** Select the **Open** option from the **Filter by** list to view all unassigned To Dos. **f.** Click the link in the **Message** column corresponding to the To Do of the invoice request that you want to review.

The **Invoice Request** screen appears.

2. Review the details in the **Invoice Request** screen.
3. If the information in the invoice request is incorrect, then click the **Reject** button in the **Invoice Request** zone.
The **Reject Invoice Request** window appears. It contains following fields:

Field Name	Field Description	Mandatory (Yes or No)
Status Reason	Used to indicate the reason why you want to reject the invoice request. **Note:** The list includes only those reasons which are defined for the **Rejected** status of the **C1-InvoiceRequest** business object in the **Status Reason** screen.	Yes
Comments	Used to specify additional information for rejecting the invoice request.	No

Note: The **Reject** button appears when:

- The invoice request is in the **Approval In Progress** status.
- A user with the approval To Do role is reviewing the invoice request.

4. Select the reason for rejecting the invoice request from the **Status Reason** list.
5. Click **Save**.
The status of the invoice request is changed to **Rejected**.

Related Topics

For more information on...	See...
How to search for an invoice request	Searching for an Invoice Request on page 3851
Invoice Request screen	Invoice Request (Used for Viewing) on page 3854
Invoice Request zone	Invoice Request on page 3855

Requesting the Submitter to Resubmit the Invoice Request for Approval

Procedure

To request the submitter to resubmit the invoice request for approval:

1. Do either of the following:

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If you want to...	Then...
Request for resubmitting an invoice request through the Invoice Request screen	**a.** Search for the invoice request in the **Invoice Request** screen. **b.** In the **Search Results** section, click the link in the **Invoice Request Information** column corresponding to the invoice request which you want to review.
Request for resubmitting an invoice request from the To Do List screen	**a.** Click the **Menu** link in the **Application** toolbar. A list appears. **b.** From the **Main** menu, select **To Do** and then click **To Do List**. The **To Do Type for User Search** window appears. **c.** Enter **C1-INVRATODO** in the **To Do Type** field. **d.** Click the **Search** button corresponding to the **To Do Type** field. The **To Do List** screen appears. **e.** Select the **Open** option from the **Filter by** list to view all unassigned To Dos. **f.** Click the link in the **Message** column corresponding to the To Do of the invoice request that you want to review.

The **Invoice Request** screen appears.

2. Review the details in the **Invoice Request** screen.
3. If the information in the invoice request is incomplete and you want the submitter to make the required changes *a*nd resubmit the invoice request for approval, then click the **Resubmit** button in the **Invoice Request** zone.
The **Resubmit Invoice Request** window appears. It contains the following field:

Field Name	Field Description	Mandatory (Yes or No)
Comments	Used to specify the changes which the submitter should make in the invoice request before resubmitting it for approval.	Yes

Note: The **Resubmit** button appears when:

- The invoice request is in the **Approval In Progress** status.
- A user with the approval To Do role is reviewing the invoice request.

4. Specify the changes in the **Comments** field and then click **Save**.
A To Do is created using the submitter To Do type and assigned to all users with a submitter To Do role specified in the invoice request type. In addition, the status of the invoice request is changed to **Draft**.

Related Topics

For more information on...	See...
How to search for an invoice request	Searching for an Invoice Request on page 3851
Invoice Request screen	Invoice Request (Used for Viewing) on page 3854
Invoice Request zone	Invoice Request on page 3855

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Viewing the Log of an Invoice Request

Procedure

To view the log of an invoice request:

1. Search for the invoice request in the **Invoice Request** screen.
2. In the **Search Results** section, click the link in the **Invoice Request Information** column corresponding to *t*he invoice request whose log you want to view.
   The **Invoice Request** screen appears.
3. Click the **Log** tab.
   The **Log** tab appears.
4. View the complete trail of actions performed on the invoice request in the **Invoice Request Log** zone.

Related Topics

For more information on...	See...
How to search for an invoice request	Searching for an Invoice Request on page 3851
Invoice Request screen	Invoice Request (Used for Viewing) on page 3854
Invoice Request Log zone	Invoice Request on page 3855

Adding a Log Entry for an Invoice Request

Procedure

To add a log entry for an invoice request:

1. Search for the invoice request in the **Invoice Request** screen.
2. In the **Search Results** section, click the link in the **Invoice Request Information** column corresponding to *t*he invoice request for which you want to add a log entry.
   The **Invoice Request** screen appears.
3. Click the **Log** tab.
   The **Log** tab appears.
4. Click the **Add Log Entry** link in the upper right corner of the **Invoice Request Log** zone.

   The **Add Request Log** window appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Request Information	Displays information about the invoice request.	Not applicable
Log Details	Used to specify the reason for adding a log entry for the invoice request.	Yes

5. Enter the required details in the **Log Details** field.
6. Click **Save**.
   The log entry is added for the **Invoice Request Log** zone.

Related Topics

For more information on...	See...
How to search for an invoice request	Searching for an Invoice Request on page 3851
Invoice Request screen	Invoice Request (Used for Viewing) on page 3854

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For more information on...	See...
Invoice Request Log zone	Invoice Request Log on page 3861

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Chapter 46

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

Topics:

- C1-CreateHoldRequest Business Service
- C1-UpdateHoldRequest Business Service
- C1-GetHoldRequestHistory Business Service
- C1-ReleaseHoldRequest Business Service

Oracle Revenue Management and Billing enables you to create, edit, and release a hold request through an inbound web service. It also enables you to view the details of a hold request through an inbound web service. You can send the hold creation, update, view, or release request from an external system through an inbound web service.

The following business services are shipped with the product to support different hold request operations:

- **C1-CreateHoldRequest** – Used to create a hold request for a single entity (i.e., for a particular person, account, or bill). For more information, see C1-CreateHoldRequest Business Service on page 3876.
- **C1-UpdateHoldRequest** – Used to edit an active hold request. For more information, see C1-UpdateHoldRequest Business Service on page 3898.
- **C1-GetHoldRequestHistory** – Used to fetch the details of the active hold requests for a single entity (i.e. person, account, or bill). For more information, see C1-GetHoldRequestHistory Business Service on page 3914.
- **C1-ReleaseHoldRequest** – Used to release an active hold request with a single entity (i.e. person, account, or bill). For more information, see C1-ReleaseHoldRequest Business Service on page 3929.

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

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

C1-CreateHoldRequest Business Service

The **Create Hold Request** (**C1-CreateHoldRequest**) business service enables you to create a hold request for a single entity (i.e., for a particular person, account, or bill). In other words, you cannot include multiple entities in the same hold request. You can call this business service from an external system through an inbound web service. If you want to send the hold creation request in the XML and/or JSON format, you need to ensure that you create a REST based inbound web service in Oracle Revenue Management and Billing. However, if you want to send the hold creation request in the XML format, you can create a SOAP or REST based inbound web service in Oracle Revenue Management and Billing.

While sending the hold creation request, you need to specify the following details:

- Hold request type, hold request start date, and hold request end date or hold days (which is used to calculate hold request end date if not specified).
- Entity (i.e., Person, Account, or Bill) for which you want to create the hold request.
- Hold reason and comments, if any.
- Entity identifiers or entity ID when the entity is an account or a person, and the entity ID when the entity is a bill.
- Hold entity and hold process end dates.
- Business processes (i.e., Auto Pay, Bill Generation, Delinquency, Funding, Overdue, Refund) which you want to hold for the entity for the given duration.
- Characteristics for the hold request, if required.

Note:

You must specify an active hold request type where the approval process is not configured for activation and release.

If you do not specify the hold request type, the system, by default, considers the hold request type specified in the **Default Hold Request Type for IWS** option type of the **C1-HOLDSRCH** feature configuration.

This business service allows you to create a future dated hold request but not a past dated hold request.

Even if you explicitly specify a value for the defer processing count in the hold request type, it is not considered by this business service while creating a hold request. The system will always create the hold request in the **Active** status.

On creating a hold request, the status of the hold request is set to **Active**. The start date of the hold entity and hold process is set to the hold request start date. If you do not specify the hold entity and/or hold process end dates, the system, by default, sets it to the hold request end date. While creating a hold request through an inbound web service, the system sets the creation mode of the hold request to **Automatic**.

Once the hold request is created through an inbound web service, the hold request ID is sent in the response along with its status. If an error occurs while creating the hold request, the system sends the error message in the response. The system enables you to track the hold creation response sent to the external system using the **Inbound Web Service History** feature.

For more information, see the **Inbound Web Service History** section in the *Oracle Revenue Management and Billing Administrative Guide*.

Related Topics

For more information on...	See...
Hold Creation Request in the XML Format	Hold Creation Request in the XML Format on page 3877
Hold Creation Response in the XML Format	Hold Creation Response in the XML Format on page 3878
Hold Creation Request in the JSON Format	Hold Creation Request in the JSON Format on page 3888

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For more information on...	See...
Hold Creation Response in the JSON Format	Hold Creation Response in the JSON Format on page 3889
Hold Creation Request and Response - Tags in XML Format	Hold Creation Request and Response - Tags in XML Format on page 3879
Hold Creation Request and Response - Attribute/Value Pairs in JSON Format	Hold Creation Request and Response - Attribute/Value Pairs in JSON Format on page 3890
Sample Hold Creation Request and Response in the XML Format	Sample Hold Creation Request and Response in the XML Format on page 3886
Sample Hold Creation Request and Response in the JSON Format	Sample Hold Creation Request and Response in the JSON Format on page 3896

Prerequisites

To create a hold request through an inbound web service, you need to do the following:

- Define a REST or SOAP based inbound web service to call the **C1-CreateHoldRequest** business service where **HTTP Method** is set to **Post** and **URI Component** is set to/**createHold**.
- Authorize the ORMB user to access the required application service.
- Define the required active hold request type where the **Activation Approval** option is not selected.
- Define the required source systems in the **C1-SourceSystemLookup** extendable lookup.
- Define the required person or account identifier types in the system.
- Ensure that the entities (i.e., person, account, or bill) that you want to keep on hold through a hold request should exist in the system.
- Define the required values for the **HOLD_REASON_FLG**, **HOLD_ENTITY_LVL_FLG**, and **HOLD_PROCESS_FLG** lookup fields.
- Define the required characteristic types where the characteristic entity is set to **Hold Request**.
- Set the **Default Hold Request Type for IWS** option type of the **C1-HOLDSRCH** feature configuration.

Related Topics

For more information on...	See...
How to setup the **C1-HOLDSRCH** feature configuration	Setting the C1-HOLDSRCH Feature Configuration on page 1888

Hold Creation Request in the XML Format

The following code snippet illustrates how the tags should be nested while receiving the hold creation request in the XML format:

```
<C1-CreateHoldRequest>
    <holdRequest>
        <sourceSystem></sourceSystem>
        <externalTransactionId></externalTransactionId>
        <externalSourceId></externalSourceId>
        <holdStartDate></holdStartDate>
        <holdEndDate></holdEndDate>
        <holdDays></holdDays>
        <holdRequestType></holdRequestType>
```

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```
        <holdEntity></holdEntity>
        <holdReason></holdReason>
        <holdComments></holdComments>
        <entityIdentifierType></entityIdentifierType>
        <entityIdentifierValue></entityIdentifierValue>
        <entityId></entityId>
        <holdEntityEndDate></holdEntityEndDate>
        <hierarchySwitch></hierarchySwitch>
        <holdProcessData>
            <holdProcess></holdProcess>
            <holdProcessEndDate></holdProcessEndDate>
        </holdProcessData>
        <characteristics>
            <characteristicType></characteristicType>
            <characteristicValue></characteristicValue>
            <effectiveDate></effectiveDate>
        </characteristics>
    </holdRequest>
</C1-CreateHoldRequest>
```

Note: Here, the **C1-CreateHoldRequest** tag represents the operation in the inbound web service which is used to call the **C1-CreateHoldRequest** business service. This tag would change depending on the operation name specified in your SOAP or REST based inbound web service. For example, if you have set the operation name to **CreateHoldRequest**, then you need to specify the **CreateHoldRequest** tag instead of the **C1-CreateHoldRequest** tag in the above request.

Related Topics

For more information on...	See...
Hold Creation Response in the XML Format	Hold Creation Response in the XML Format on page 3878
Hold Creation Request and Response - Tags in XML Format	Hold Creation Request and Response - Tags in XML Format on page 3879
Sample Hold Creation Request and Response in the XML Format	Sample Hold Creation Request and Response in the XML Format on page 3886

Hold Creation Response in the XML Format

The following code snippet illustrates how the tags are nested while sending the hold creation response in the XML format:

```
<C1-CreateHoldRequest>
    <holdRequest>
        <statusCd></statusCd>
        <holdRequestId></holdRequestId>
        <holdStatus></holdStatus>
        <messageText></messageText>
        <sourceSystem></sourceSystem>
        <externalTransactionId></externalTransactionId>
        <externalSourceId></externalSourceId>
        <holdStartDate></holdStartDate>
        <holdEndDate></holdEndDate>
        <holdDays></holdDays>
        <holdRequestType></holdRequestType>
        <holdEntity></holdEntity>
        <holdReason></holdReason>
        <holdComments></holdComments>
        <entityIdentifierType></entityIdentifierType>
```

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```
        <entityIdentifierValue></entityIdentifierValue>
        <entityId></entityId>
        <holdEntityEndDate></holdEntityEndDate>
        <hierarchySwitch></hierarchySwitch>
        <holdProcessData>
            <holdProcess></holdProcess>
            <holdProcessEndDate></holdProcessEndDate>
        </holdProcessData>
        <characteristics>
            <characteristicType></characteristicType>
            <characteristicValue></characteristicValue>
            <effectiveDate></effectiveDate>
        </characteristics>
    </holdRequest>
</C1-CreateHoldRequest>
```

Note: Here, the **C1-CreateHoldRequest** tag represents the operation in the inbound web service which is used to call the **C1-CreateHoldRequest** business service. This tag would change depending on the operation name specified in your SOAP or REST based inbound web service. For example, if you have set the operation name to **CreateHoldRequest**, then the **CreateHoldRequest** tag appears instead of the **C1-CreateHoldRequest** tag in the above response.

Related Topics

For more information on...	See...
Hold Creation Request in the XML Format	Hold Creation Request in the XML Format on page 3877
Hold Creation Request and Response - Tags in XML Format	Hold Creation Request and Response - Tags in XML Format on page 3879
Sample Hold Creation Request and Response in the XML Format	Sample Hold Creation Request and Response in the XML Format on page 3886

Hold Creation Request and Response - Tags in XML Format

Note: We recommend you to refer the Hold Creation Request in the XML Format on page 3877 and Hold Creation Response in the XML Format on page 3878 topics in parallel while understanding the below mentioned tags. This will help you to understand how the tags are nested in the XML format.

Before calling the **C1-CreateHoldRequest** business service through an inbound web service, you need to ensure that the hold creation request contains the following tags:

Tag Name	Tag Description	Mandatory (Yes or No)
C1-CreateHoldRequest	Used to indicate that you want to invoke the **C1-CreateHoldRequest** business service.	Yes

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Tag Name	Tag Description	Mandatory (Yes or No)
	Note: Here, the **C1-CreateHoldRequest** tag represents the operation in the inbound web service which is used to call the **C1-CreateHoldRequest** business service. This tag would change depending on the operation name specified in your SOAP or REST based inbound web service. For example, if you have set the operation name to **CreateHoldRequest**, then you need to specify the **CreateHoldRequest** tag instead of the **C1-CreateHoldRequest** tag in the hold creation request.	
holdRequest	Used to specify the details of the hold request.	Yes
sourceSystem	Used to indicate the external system from where the hold creation request is received. **Note:** You must specify an external system which is already defined in the system. If the **Inbound Web Service History** feature is enabled, the system validates whether the specified external system matches the external system that is associated with the outbound message type specified in the **C1-IWSHIST** algorithm. If so, the system stamps the specified external system corresponding to the record in the **C1_IWS_HIST** table. If the external system is not specified in the hold creation request, the system, by default, stamps the external system associated with the outbound message type (specified in the **C1-IWSHIST** algorithm) corresponding to the record in the **C1_IWS_HIST** table. For more information, see the **Inbound Web Service History** section in the *Oracle Revenue Management and Billing Administrative Guide*.	No
externalTransactionId	Used to indicate the transaction in the external system through which the hold creation request is received. **Note:** If the **Inbound Web Service History** feature is enabled, the system stores the external transaction ID corresponding to the record in the **C1_IWS_HIST** table.	No
externalSourceId	Used to specify the external source system ID.	No

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Tag Name	Tag Description	Mandatory (Yes or No)
	Note: If the **Inbound Web Service History** feature is enabled, the system stores the external source system ID corresponding to the record in the **C1_IWS_HIST** table.	
holdStartDate	Used to specify the date from when the hold request is effective. **Note:** The hold request start date cannot be later than the hold request end date. You must specify the date in the **YYYY-MM-DD** format. Here, you can specify the current or any future date but not a past date.	Yes
holdEndDate	Used to specify the date till when the hold request is effective. **Note:** The hold request end date cannot be earlier than the hold request start date. You must specify the date in the **YYYY-MM-DD** format.	Yes (Conditional) **Note:** This data is required when the value is not specified in the **holdDays** tag.
holdDays	Used to indicate the number of days for which an entity should be kept on hold through the hold request. The system then calculates the hold request end date using the hold days (i.e., hold request end date = hold request start date + hold days). For example, if the hold request start date is 01-Jan-2025 and hold days is 20, then the system sets the hold request end date to 20-Jan-2025. **Note:** You must specify a positive integer value in this tag.	Yes (Conditional) **Note:** This data is required when the value is not specified in the **holdEndDate** tag.
holdRequestType	Used to indicate a hold request type using which you want to create the hold request.	No

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Tag Name	Tag Description	Mandatory (Yes or No)
	Note: You must specify a hold request type which is already defined in the system. It should be in the **Active** status. Also, ensure that the **Activation Approval** option is not selected in the specified hold request type. If you do not specify a hold request type, the system, by default, considers the hold request type specified in the **Default Hold Request Type for IWS** option type of the **C1-HOLDSRCH** feature configuration.	
holdEntity	Used to indicate the type of entity for which you want to create the hold request. The valid values are: • **ACCT** - Used when you want to create a hold request for an account. • **BILL** - Used when you want to create a hold request for a bill. • **PERS** - Used when you want to create a hold request for a person. **Note:** You must specify a value which is already defined in the **HOLD_ENTITY_LVL_FLG** lookup field. It must be in the **Active** status.	Yes
holdReason	Used to indicate the reason why you want to hold the entity. **Note:** You must specify a value which is already defined in the **HOLD_REASON_FLG** lookup field. It must be in the **Active** status.	Yes
holdComments	Used to specify additional information about the hold request.	No
entityIdentifierType	Used to specify the person or account identifier type. **Note:** You must specify a person or account identifier type which is already defined in the system. It should be a primary identifier type for the respective entity.	Yes (Conditional) **Note:** This data is required when: • **ACCT** or **PERS** is specified in the **holdEntity** tag. • The value is not specified in the **entityId** tag.

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Tag Name	Tag Description	Mandatory (Yes or No)
entityIdentifierValue	Used to specify the entity identifier (i.e., person or account identifier). It should be the primary identifier of the respective entity. **Note:** The system then derives the person or account ID using the given primary entity identifier details, and accordingly creates a hold request for the respective entity.	Yes (Conditional) **Note:** This data is required when: • **ACCT** or **PERS** is specified in the **holdEntity** tag. • The value is not specified in the **entityId** tag.
entityId	Used to specify the entity ID (i.e., person, account, or bill ID). **Note:** If you have specified the bill ID, the system checks whether a bill exists in the system with the given ID. If so, the system creates a hold request for the respective bill. However, if the system could not derive the bill using the bill ID, the system considers the given value as the alternate bill ID and then checks whether any bill exists in the system with the alternate bill ID. If so, the system creates a hold request for the respective bill. However, if the system could not derive the bill using the alternate bill ID, the system does not allow you to create a hold request.	Yes (Conditional) **Note:** This data is required when: • **ACCT** or **PERS** is specified in the **holdEntity** tag and the values are not specified in the **entityIdentifierType** and **entityIdentifierValue** tags. • **BILL** is specified in the **holdEntity** tag.
holdEntityEndDate	Used to specify the date till when you want to hold the entity. **Note:** You must specify the date in the **YYYY-MM-DD** format. The hold entity end date must be between hold request start and end dates and between at least one process's start and end dates. The hold entity end date cannot be earlier than the hold entity start date. Note that, by default, the system sets the hold entity start date to the hold request start date. If you do not specify the hold entity end date, the system, by default, sets it to the hold request end date.	No
hierarchySwitch	Used to indicate whether all the accounts in the person's hierarchy or only the persons' immediate accounts should be kept on hold. Note that the system considers only the child persons and not the grand child persons from the person's hierarchy and then derives the accounts where the child person is the main customer. The valid values are: • Y • N	No

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Tag Name	Tag Description	Mandatory (Yes or No)
	Note: This tag is applicable only when **PERS** is specified in the **holdEntity** tag.	
holdProcessData	Used to specify information about the process that you want to hold for the entity.	Yes
holdProcess	Used to specify the process that you want to keep on hold for the entity. The valid values are: • **ATPY** - Used when you want to hold the auto pay process of the entity. It is valid only when **ACCT** is specified in the **holdEntity** tag. • **BILL** - Used when you want to hold the bill generation process of the entity. It is valid only when **ACCT** or **PERS** is specified in the **holdEntity** tag. • **DELQ** - Used when you want to hold the delinquency process of the entity. It is valid only when **ACCT** or **PERS** is specified in the **holdEntity** tag. • **FNDG** - Used when you want to hold the funding process of the entity. It is valid when **ACCT**, **PERS**, or **BILL** is specified in the **holdEntity** tag. • **OVDU** - Used when you want to hold the overdue process of the entity. It is valid only when **ACCT** is specified in the **holdEntity** tag. • **REFD** - Used when you want to hold the refund process of the entity. It is valid only when **ACCT** is specified in the **holdEntity** tag. **Note:** You must specify a value which is already defined in the **HOLD_PROCESS_FLG** lookup field. It must be in the **Active** status. You cannot specify both the **OVDU** and **DELQ** processes at a time in the hold creation request. The **Overdue** process is valid for the financial services and health insurance domains but the **Delinquency** process is valid only for the health insurance domain.	Yes
holdProcessEndDate	Used to specify the date till when you want to hold the process of the entity.	No

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Tag Name	Tag Description	Mandatory (Yes or No)
	Note: You must specify the date in the **YYYY-MM-DD** format. The hold process end date must be between the hold request start and end dates. The hold process end date cannot be earlier than the hold process start date. Note that, by default, the system sets the hold process start date to the hold request start date. If you do not specify the hold process end date, the system, by default, sets it to the hold request end date.	
characteristics	Used to specify a characteristic for the hold request.	No
characteristicType	Used to indicate the characteristic type.	Yes (Conditional)
	Note: You must specify a characteristic type where the characteristic entity is set to **Hold Request**.	**Note:** This data is required while defining a characteristic for the hold request.
characteristicValue	Used to specify the value for the characteristic type.	Yes (Conditional) **Note:** This data is required while defining a characteristic for the hold request.
effectiveDate	Used to specify the date from when the characteristic is effective for the hold request.	Yes (Conditional) **Note:** This data is required while defining a characteristic for the hold request.

The following table lists and describes additional tags that are included in the hold creation response:

Tag Name	Tag Description
statusCd	Indicates whether the hold creation request is successfully processed or not. The valid values are: • Success • Failure
holdRequestId	Displays the hold request ID. **Note:** This tag appears when the value in the **statusCd** tag is set to **Success**.
holdStatus	Indicates the status of the hold request. The valid value is: • Active

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Tag Name	Tag Description
	Note: This tag appears when the value in the **statusCd** tag is set to **Success**.
messageText	Indicates the error that occurred while creating the hold request.
	Note: This tag appears when the value in the **statusCd** tag is set to **Failure**.

Related Topics

For more information on...	See...
Sample Hold Creation Request and Response in the XML Format	Sample Hold Creation Request and Response in the XML Format on page 3886

Sample Hold Creation Request and Response in the XML Format

Using the below example, you can create a hold request for an account where the bill generation and auto pay processes are kept on hold.

Sample Hold Creation Request in the XML Format

```
<C1-CreateHoldRequest>
    <holdRequest>
        <sourceSystem>SMALL_PRIME</sourceSystem>
        <externalTransactionId>567888876666</externalTransactionId>
        <externalSourceId>656565</externalSourceId>
        <holdStartDate>2024-12-01</holdStartDate>
        <holdEndDate>2024-12-31</holdEndDate>
        <holdDays></holdDays>
        <holdRequestType>HOLD_WITHOUT_APPROVAL</holdRequestType>
        <holdEntity>ACCT</holdEntity>
        <holdReason>DSRE</holdReason>
        <holdComments>Disaster Recovery</holdComments>
        <entityIdentifierType>IBAN</entityIdentifierType>
        <entityIdentifierValue>XX00XXXX111111</entityIdentifierValue>
        <entityId></entityId>
        <holdEntityEndDate>2024-12-30</holdEntityEndDate>
        <hierarchySwitch></hierarchySwitch>
        <holdProcessData>
            <holdProcess>BILL</holdProcess>
            <holdProcessEndDate>2024-12-20</holdProcessEndDate>
        </holdProcessData>
        <holdProcessData>
            <holdProcess>ATPY</holdProcess>
            <holdProcessEndDate>2024-12-31</holdProcessEndDate>
        </holdProcessData>
        <characteristics>
            <characteristicType>HOLD_TYPE</characteristicType>
            <characteristicValue>P</characteristicValue>
            <effectiveDate>2024-12-01</effectiveDate>
        </characteristics>
        <characteristics>
            <characteristicType>ESC_PATH</characteristicType>
            <characteristicValue>01</characteristicValue>
            <effectiveDate>2024-12-01</effectiveDate>
        </characteristics>
    </holdRequest>
```

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```
</C1-CreateHoldRequest>
```

Sample Hold Creation Response in the XML Format

```
<C1-CreateHoldRequest>
    <holdRequest>
        <statusCd>Success</statusCd>
        <holdRequestId>790420762398</holdRequestId>
        <holdStatus>Active</holdStatus>
        <sourceSystem>SMALL_PRIME</sourceSystem>
        <externalTransactionId>567888876666</externalTransactionId>
        <externalSourceId>656565</externalSourceId>
        <holdStartDate>2024-12-01</holdStartDate>
        <holdEndDate>2024-12-31</holdEndDate>
        <holdDays></holdDays>
        <holdRequestType>HOLD_WITHOUT_APPROVAL</holdRequestType>
        <holdEntity>ACCT</holdEntity>
        <holdReason>DSRE</holdReason>
        <holdComments>Disaster Recovery</holdComments>
        <entityIdentifierType>IBAN</entityIdentifierType>
        <entityIdentifierValue>XX00XXXX111111</entityIdentifierValue>
        <entityId></entityId>
        <holdEntityEndDate>2024-12-30</holdEntityEndDate>
        <hierarchySwitch></hierarchySwitch>
        <holdProcessData>
            <holdProcess>BILL</holdProcess>
            <holdProcessEndDate>2024-12-20</holdProcessEndDate>
        </holdProcessData>
        <holdProcessData>
            <holdProcess>ATPY</holdProcess>
            <holdProcessEndDate>2024-12-31</holdProcessEndDate>
        </holdProcessData>
        <characteristics>
            <characteristicType>HOLD_TYPE</characteristicType>
            <characteristicValue>P</characteristicValue>
            <effectiveDate>2024-12-01</effectiveDate>
        </characteristics>
        <characteristics>
            <characteristicType>ESC_PATH</characteristicType>
            <characteristicValue>01</characteristicValue>
            <effectiveDate>2024-12-01</effectiveDate>
        </characteristics>
    </holdRequest>
</C1-CreateAdjustment>
```

Note: We have given the above request sample to illustrate how the tags should be nested while receiving a hold creation request from the external system. However, you should not seamlessly use this sample in your environment because the required pre-requisite data may not be available in your environment. In such case, the system will give erroneous results.

Related Topics

For more information on...	See...
Hold Creation Request and Response - Tags in XML Format	Hold Creation Request and Response - Tags in XML Format on page 3879

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Hold Creation Request in the JSON Format

The following code snippet illustrates how the attribute/value pairs should be structured while receiving the hold creation request in the JSON format:

```
{
   -"C1-CreateHoldRequest": {
       -"holdRequest": {
           -"sourceSystem": -"",
           -"externalTransactionId": -"",
           -"externalSourceId": -"",
           -"holdStartDate": -"",
           -"holdEndDate": -"",
           -"holdDays": -"",
           -"holdRequestType": -"",
           -"holdEntity": -"",
           -"holdReason": -"",
           -"holdComments": -"",
           -"entityIdentifierType": -"",
           -"entityIdentifierValue": -"",
           -"entityId": -"",
           -"holdEntityEndDate": -"",
           -"hierarchySwitch": -"",
           -"holdProcessData": {
               -"holdProcess": -"",
               -"holdProcessEndDate": -""
           -},
           -"characteristics": {
               -"characteristicType": -"",
               -"characteristicValue": -"",
               -"effectiveDate": -""
           -}
       -}
   -}
-}
```

Note: Here, the **C1-CreateHoldRequest** attribute represents the operation in the inbound web service which is used to call the **C1-CreateHoldRequest** business service. This attribute would change depending on the operation name specified in your REST based inbound web service. For example, if you have set the operation name to **CreateHoldRequest**, then you need to specify the **CreateHoldRequest** attribute instead of the **C1-CreateHoldRequest** attribute in the above request.

Related Topics

For more information on...	See...
Hold Creation Response in the JSON Format	Hold Creation Response in the JSON Format on page 3889
Hold Creation Request and Response - Attribute/Value Pairs in JSON Format	Hold Creation Request and Response - Attribute/Value Pairs in JSON Format on page 3890
Sample Hold Creation Request and Response in the JSON Format	Sample Hold Creation Request and Response in the JSON Format on page 3896

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Hold Creation Response in the JSON Format

The following code snippet illustrates how the attribute/value pairs are structured while sending the hold creation response in the JSON format:

```
{
   -"C1-CreateHoldRequest": {
       -"holdRequest": {
           -"statusCd": -"",
               -"holdRequestId": -"",
           -"holdStatus": -"",
           -"messageText": -"",
               -"sourceSystem": -"",
           -"externalTransactionId": -"",
           -"externalSourceId": -"",
           -"holdStartDate": -"",
           -"holdEndDate": -"",
           -"holdDays": -"",
           -"holdRequestType": -"",
           -"holdEntity": -"",
           -"holdReason": -"",
           -"holdComments": -"",
           -"entityIdentifierType": -"",
           -"entityIdentifierValue": -"",
           -"entityId": -"",
           -"holdEntityEndDate": -"",
           -"hierarchySwitch": -"",
           -"holdProcessData": {
               -"holdProcess": -"",
               -"holdProcessEndDate": -""
           -},
           -"characteristics": {
               -"characteristicType": -"",
               -"characteristicValue": -"",
               -"effectiveDate": -""
           -}
       -}
   -}
-}
```

Note: Here, the **C1-CreateHoldRequest** attribute represents the operation in the inbound web service which is used to call the **C1-CreateHoldRequest** business service. This attribute would change depending on the operation name specified in your REST based inbound web service. For example, if you have set the operation name to **CreateHoldRequest**, then the **CreateHoldRequest** attribute appears instead of the **C1-CreateHoldRequest** attribute in the above response.

Related Topics

For more information on...	See...
Hold Creation Request in the JSON Format	Hold Creation Request in the JSON Format on page 3888
Hold Creation Request and Response - Attribute/Value Pairs in JSON Format	Hold Creation Request and Response - Attribute/Value Pairs in JSON Format on page 3890
Sample Hold Creation Request and Response in the JSON Format	Sample Hold Creation Request and Response in the JSON Format on page 3896

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Hold Creation Request and Response - Attribute/Value Pairs in JSON Format

Note: We recommend you to refer the Hold Creation Request in the JSON Format on page 3888 and Hold Creation Response in the JSON Format on page 3889 topics in parallel while understanding the below mentioned attributes. This will help you to understand how the attribute/value pairs are structured in the JSON format.

Before calling the **C1-CreateHoldRequest** business service through an inbound web service, you need to ensure that the hold creation request contains the following attributes:

Attribute Name	Attribute Description	Mandatory (Yes or No)
C1-CreateHoldRequest	Used to indicate that you want to invoke the **C1-CreateHoldRequest** business service. **Note:** Here, the **C1-CreateHoldRequest** attribute represents the operation in the inbound web service which is used to call the **C1-CreateHoldRequest** business service. This attribute would change depending on the operation name specified in your REST based inbound web service. For example, if you have set the operation name to **CreateHoldRequest**, then you need to specify the **CreateHoldRequest** attribute instead of the **C1-CreateHoldRequest** attribute in the hold creation request.	Yes
holdRequest	Used to specify the details of the hold request.	Yes
sourceSystem	Used to indicate the external system from where the hold creation request is received. **Note:** You must specify an external system which is already defined in the system. If the **Inbound Web Service History** feature is enabled, the system validates whether the specified external system matches the external system that is associated with the outbound message type specified in the **C1-IWSHIST** algorithm. If so, the system stamps the specified external system corresponding to the record in the **C1_IWS_HIST** table. If the external system is not specified in the hold creation request, the system, by default, stamps the external system associated with the outbound message type (specified in the **C1-IWSHIST** algorithm) corresponding to the record in the **C1_IWS_HIST** table. For more information, see the **Inbound Web Service History** section in the *Oracle Revenue Management and Billing Administrative Guide*.	No

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Attribute Name	Attribute Description	Mandatory (Yes or No)
externalTransactionId	Used to indicate the transaction in the external system through which the hold creation request is received. **Note:** If the **Inbound Web Service History** feature is enabled, the system stores the external transaction ID corresponding to the record in the **C1_IWS_HIST** table.	No
externalSourceId	Used to specify the external source system ID. **Note:** If the **Inbound Web Service History** feature is enabled, the system stores the external source system ID corresponding to the record in the **C1_IWS_HIST** table.	No
holdStartDate	Used to specify the date from when the hold request is effective. **Note:** The hold request start date cannot be later than the hold request end date. You must specify the date in the **YYYY-MM-DD** format. Here, you can specify the current or any future date but not a past date.	Yes
holdEndDate	Used to specify the date till when the hold request is effective. **Note:** The hold request end date cannot be earlier than the hold request start date. You must specify the date in the **YYYY-MM-DD** format.	Yes (Conditional) **Note:** This data is required when the value is not specified for the **holdDays** attribute.
holdDays	Used to indicate the number of days for which an entity should be kept on hold through the hold request. The system then calculates the hold request end date using the hold days (i.e., hold request end date = hold request start date + hold days). For example, if the hold request start date is 01-Jan-2025 and hold days is 20, then the system sets the hold request end date to 20-Jan-2025. **Note:** You must specify a positive integer value in this attribute.	Yes (Conditional) **Note:** This data is required when the value is not specified for the **holdEndDate** attribute.
holdRequestType	Used to indicate a hold request type using which you want to create the hold request.	No

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Attribute Name	Attribute Description	Mandatory (Yes or No)
	Note: You must specify a hold request type which is already defined in the system. It should be in the **Active** status. Also, ensure that the **Activation Approval** option is not selected in the specified hold request type. If you do not specify a hold request type, the system, by default, considers the hold request type specified in the **Default Hold Request Type for IWS** option type of the **C1-HOLDSRCH** feature configuration.	
holdEntity	Used to indicate the type of entity for which you want to create the hold request. The valid values are: • **ACCT** - Used when you want to create a hold request for an account. • **BILL** - Used when you want to create a hold request for a bill. • **PERS** - Used when you want to create a hold request for a person. **Note:** You must specify a value which is already defined in the **HOLD_ENTITY_LVL_FLG** lookup field. It must be in the **Active** status.	Yes
holdReason	Used to indicate the reason why you want to hold the entity. **Note:** You must specify a value which is already defined in the **HOLD_REASON_FLG** lookup field. It must be in the **Active** status.	Yes
holdComments	Used to specify additional information about the hold request.	No
entityIdentifierType	Used to specify the person or account identifier type. **Note:** You must specify a person or account identifier type which is already defined in the system. It should be a primary identifier type for the respective entity.	Yes (Conditional) **Note:** This data is required when: • **ACCT** or **PERS** is specified for the **holdEntity** attribute. • The value is not specified for the **entityId** attribute.

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Attribute Name	Attribute Description	Mandatory (Yes or No)
entityIdentifierValue	Used to specify the entity identifier (i.e., person or account identifier). It should be the primary identifier of the respective entity. **Note:** The system then derives the person or account ID using the given primary entity identifier details, and accordingly creates a hold request for the respective entity.	Yes (Conditional) **Note:** This data is required when: • **ACCT** or **PERS** is specified for the **holdEntity** attribute. • The value is not specified for the **entityId** attribute.
entityId	Used to specify the entity ID (i.e., person, account, or bill ID). **Note:** If you have specified the bill ID, the system checks whether a bill exists in the system with the given ID. If so, the system creates a hold request for the respective bill. However, if the system could not derive the bill using the bill ID, the system considers the given value as the alternate bill ID and then checks whether any bill exists in the system with the alternate bill ID. If so, the system creates a hold request for the respective bill. However, if the system could not derive the bill using the alternate bill ID, the system does not allow you to create a hold request.	Yes (Conditional) **Note:** This data is required when: • **ACCT** or **PERS** is specified for the **holdEntity** attribute and the values are not specified for the **entityIdentifierType** and **entityIdentifierValue** attributes. • **BILL** is specified for the **holdEntity** attribute.
holdEntityEndDate	Used to specify the date till when you want to hold the entity. **Note:** You must specify the date in the **YYYY-MM-DD** format. The hold entity end date must be between hold request start and end dates and between at least one process's start and end dates. The hold entity end date cannot be earlier than the hold entity start date. Note that, by default, the system sets the hold entity start date to the hold request start date. If you do not specify the hold entity end date, the system, by default, sets it to the hold request end date.	No
hierarchySwitch	Used to indicate whether all the accounts in the person's hierarchy or only the persons' immediate accounts should be kept on hold. Note that the system considers only the child persons and not the grand child persons from the person's hierarchy and then derives the accounts where the child person is the main customer. The valid values are: • Y • N	No

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Attribute Name	Attribute Description	Mandatory (Yes or No)
	Note: This attribute is applicable only when **PERS** is specified for the **holdEntity** attribute.	
holdProcessData	Used to specify information about the process that you want to hold for the entity.	Yes
holdProcess	Used to specify the process that you want to keep on hold for the entity. The valid values are: • **ATPY** - Used when you want to hold the auto pay process of the entity. It is valid only when **ACCT** is specified for the **holdEntity** attribute. • **BILL** - Used when you want to hold the bill generation process of the entity. It is valid only when **ACCT** or **PERS** is specified for the **holdEntity** attribute. • **DELQ** - Used when you want to hold the delinquency process of the entity. It is valid only when **ACCT** or **PERS** is specified for the **holdEntity** attribute. • **FNDG** - Used when you want to hold the funding process of the entity. It is valid when **ACCT**, **PERS**, or **BILL** is specified for the **holdEntity** attribute. • **OVDU** - Used when you want to hold the overdue process of the entity. It is valid only when **ACCT** is specified for the **holdEntity** attribute. • **REFD** - Used when you want to hold the refund process of the entity. It is valid only when **ACCT** is specified for the **holdEntity** attribute. **Note:** You must specify a value which is already defined in the **HOLD_PROCESS_FLG** lookup field. It must be in the **Active** status. You cannot specify both the **OVDU** and **DELQ** processes at a time in the hold creation request. The **Overdue** process is valid for the financial services and health insurance domains but the **Delinquency** process is valid only for the health insurance domain.	Yes
holdProcessEndDate	Used to specify the date till when you want to hold the process of the entity.	No

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Attribute Name	Attribute Description	Mandatory (Yes or No)
	Note: You must specify the date in the **YYYY-MM-DD** format. The hold process end date must be between the hold request start and end dates. The hold process end date cannot be earlier than the hold process start date. Note that, by default, the system sets the hold process start date to the hold request start date. If you do not specify the hold process end date, the system, by default, sets it to the hold request end date.	
characteristics	Used to specify a characteristic for the hold request.	No
characteristicType	Used to indicate the characteristic type.	Yes (Conditional)
	Note: You must specify a characteristic type where the characteristic entity is set to **Hold Request**.	**Note:** This data is required while defining a characteristic for the hold request.
characteristicValue	Used to specify the value for the characteristic type.	Yes (Conditional)
		Note: This data is required while defining a characteristic for the hold request.
effectiveDate	Used to specify the date from when the characteristic is effective for the hold request.	Yes (Conditional)
		Note: This data is required while defining a characteristic for the hold request.

The following table lists and describes additional attributes that are included in the hold creation response:

Attribute Name	Attribute Description
statusCd	Indicates whether the hold creation request is successfully processed or not. The valid values are: • Success • Failure
holdRequestId	Displays the hold request ID.
	Note: This attribute appears when the value of the **statusCd** attribute is set to **Success**.
holdStatus	Indicates the status of the hold request. The valid value is: • Active

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Attribute Name	Attribute Description
	Note: This attribute appears when the value of the **statusCd** attribute is set to **Success**.
messageText	Indicates the error that occurred while creating the hold request.
	Note: This attribute appears when the value of the **statusCd** attribute is set to **Failure**.

Related Topics

For more information on...	See...
Sample Hold Creation Request and Response in the JSON Format	Sample Hold Creation Request and Response in the JSON Format on page 3896

Sample Hold Creation Request and Response in the JSON Format

Using the below example, you can create a hold request for a bill where the funding process is kept on hold.

Sample Hold Creation Request in the JSON Format

```
{
   -"CreateHoldRequest": {
       -"holdRequest": {
           -"sourceSystem": -"SMALL_PRIME",
           -"externalTransactionId": -"567888876665",
           -"externalSourceId": -"656565",
           -"holdStartDate": -"2024-12-01",
           -"holdEndDate": -"",
           -"holdDays:"31",
           -"holdRequestType": -"HOLD_WITHOUT_APPROVAL",
           -"holdEntity": -"BILL",
           -"holdReason": -"DSRE",
           -"holdComments": -"Disaster Recovery",
           -"entityIdentifierType": -"",
           -"entityIdentifierValue": -"",
           -"entityId": -"233960569988",
           -"holdEntityEndDate": -"2024-12-30",
           -"hierarchySwitch": -"",
           -"holdProcessData": {
            -"holdProcess": -"FNDG",
               -"holdProcessEndDate": -"2024-12-30"
         -},
    -"characteristics": [
    {
               -"characteristicType": -"HOLD_TYPE",
               -"characteristicValue": -"P",
               -"effectiveDate": -"2024-12-01"
           -},
      {
               -"characteristicType": -"ESC_PATH",
               -"characteristicValue": -"01",
               -"effectiveDate": -"2024-12-01"
           -}
    -]
       -}
   -}
```

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```
 -}
```

Sample Hold Creation Response in the JSON Format

```
{
   -"CreateHoldRequest": {
       -"holdRequest": {
            -"statusCd": -"Success",
            -"holdRequestId": -"790420762388",
            -"holdStatus": -"Active",
    -"sourceSystem": -"SMALL_PRIME",
            -"externalTransactionId": -"567888876665",
            -"externalSourceId": -"656565",
            -"holdStartDate": -"2024-12-01",
            -"holdEndDate": -"",
            -"holdDays:"31",
            -"holdRequestType": -"HOLD_WITHOUT_APPROVAL",
            -"holdEntity": -"BILL",
            -"holdReason": -"DSRE",
            -"holdComments": -"Disaster Recovery",
            -"entityIdentifierType": -"",
            -"entityIdentifierValue": -"",
            -"entityId": -"233960569988",
            -"holdEntityEndDate": -"2024-12-30",
            -"hierarchySwitch": -"",
            -"holdProcessData": {
             -"holdProcess": -"FNDG",
                -"holdProcessEndDate": -"2024-12-30"
          -},
    -"characteristics": [
    {
                -"characteristicType": -"HOLD_TYPE",
                -"characteristicValue": -"P",
                -"effectiveDate": -"2024-12-01"
             -},
      {
                -"characteristicType": -"ESC_PATH",
                -"characteristicValue": -"01",
                -"effectiveDate": -"2024-12-01"
             -}
   -]
      -}
   -}
-}
```

Note: We have given the above request sample to illustrate how the attribute/value pairs should be structured while receiving a hold creation request from the external system. However, you should not seamlessly use this sample in your environment because the required pre-requisite data may not be available in your environment. In such case, the system will give erroneous results.

Related Topics

For more information on...	See...
Hold Creation Request and Response - Attribute/Value Pairs in JSON Format	Hold Creation Request and Response - Attribute/Value Pairs in JSON Format on page 3890

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C1-UpdateHoldRequest Business Service

The **Update Hold Request** (**C1-UpdateHoldRequest**) business service enables you to edit an existing hold request which is in the **Active** status. You can call this business service from an external system through an inbound web service. If you want to send the hold update request in the XML and/or JSON format, you need to ensure that you create a REST based inbound web service in Oracle Revenue Management and Billing. However, if you want to send the hold update request in the XML format, you can create a SOAP or REST based inbound web service in Oracle Revenue Management and Billing.

While sending the hold update request, you need to specify the following details:

- Hold Request ID
- Hold Entity ID (i.e. person ID, account ID, or bill ID)

Through this service, you can edit the following details of an active hold request:

- End date, comments, and characteristics of the hold request
- End date of a single hold entity in the hold request
- End date of multiple hold processes in the hold request

Note: At present, you can only update the end date of a single entity through a hold update request. If two or more entities are kept on hold through a hold request, you need to initiate a separate hold update request for each entity in order to update their respective end dates.

In addition, this service enables you to:

- **Add a New Hold Process to an Existing Hold Request** - While adding a new process to an existing hold request, the system does the following:
  - Sets the hold process start date to the hold request start date.
  - If you do not specify the hold process end date, the system, by default, sets it to the hold request end date.
- **Define, Edit, or Remove a Characteristic from an Existing Hold Request** - The system enables you to perform the following actions for a hold request characteristic:
  - **UPDATE** - Used when you want to add a new characteristic to the hold request or update the details of an existing characteristic of the hold request. The system first checks whether a characteristic with the given characteristic type and effective date combination exists for the hold request. If so, the system updates the existing characteristic of the hold request. However, if a characteristic does not exist with the given characteristic type and effective date combination for the hold request, the system creates a new characteristic for the hold request.
  - **DELETE** - Used when you want to delete an existing characteristic from the hold request.

Once the hold request is edited through an inbound web service, the hold request ID is sent in the response. If an error occurs while updating the hold request, the system sends the error message in the response. The system enables you to track the hold update response sent to the external system using the **Inbound Web Service History** feature.

For more information, see the **Inbound Web Service History** section in the *Oracle Revenue Management and Billing Administrative Guide*.

Note: After updating the end date of a hold entity, you need to execute the **Hold Request Monitor** (**C1-HLMON**) batch. On executing the batch, the system will accordingly update the bill after date, postpone credit review until date, defer auto pay date, and hold refund until date, if required, for the respective entity.

Related Topics

For more information on...	See...
Hold Update Request in the XML Format	Hold Update Request in the XML Format on page 3899

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For more information on...	See...
Hold Update Response in the XML Format	Hold Update Response in the XML Format on page 3900
Hold Update Request in the JSON Format	Hold Update Request in the JSON Format on page 3907
Hold Update Response in the JSON Format	Hold Release Response in the JSON Format on page 3936
Hold Update Request and Response - Tags in XML Format	Hold Update Request and Response - Tags in XML Format on page 3901
Hold Update Request and Response - Attribute/Value Pairs in JSON Format	Hold Update Request and Response - Attribute/Value Pairs in JSON Format on page 3908
Sample Hold Update Release Request and Response in the XML Format	Sample Hold Update Request and Response in the XML Format on page 3905
Sample Hold Update Release Request and Response in the JSON Format	Sample Hold Update Request and Response in the JSON Format on page 3913

Prerequisites

To update a hold request through an inbound web service, you need to do the following:

- Define a REST or SOAP based inbound web service to call the **C1-UpdateHoldRequest** business service where **HTTP Method** is set to **Post** and **URI Component** is set to **/updateHold**.
- Authorize the ORMB user to access the required application service.
- Define the required source systems in the **C1-SourceSystemLookup** extendable lookup.
- Ensure that the entities (i.e., person, account, or bill) are already included in the hold request.
- Define the required values for the **HOLD_PROCESS_FLG** lookup field.
- Define the required characteristic types where the characteristic entity is set to **Hold Request**.

Hold Update Request in the XML Format

The following code snippet illustrates how the tags should be nested while receiving the hold update request in the XML format:

```
<C1-UpdateHoldRequest>
    <sourceSystem></sourceSystem>
    <externalTransactionId></externalTransactionId>
    <externalSourceId></externalSourceId>
    <holdRequestId></holdRequestId>
    <holdComments></holdComments>
    <holdEndDate></holdEndDate>
    <entityId></entityId>
    <entityEndDate></entityEndDate>
    <holdProcessData>
        <holdProcess></holdProcess>
        <holdProcessEndDate></holdProcessEndDate>
    </holdProcessData>
    <characteristics>
        <action></action>
        <characteristicType></characteristicType>
        <characteristicValue></characteristicValue>
        <effectiveDate></effectiveDate>
```

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```
    </characteristics>
</C1-UpdateHoldRequest>
```

Note: Here, the **C1-UpdateHoldRequest** tag represents the operation in the inbound web service which is used to call the **C1-UpdateHoldRequest** business service. This tag would change depending on the operation name specified in your SOAP or REST based inbound web service. For example, if you have set the operation name to **UpdateHoldRequest**, then you need to specify the **UpdateHoldRequest** tag instead of the **C1-UpdateHoldRequest** tag in the above request.

Related Topics

For more information on...	See...
Hold Update Response in the XML Format	Hold Update Response in the XML Format on page 3900
Hold Update Request and Response - Tags in XML Format	Hold Update Request and Response - Tags in XML Format on page 3901
Sample Hold Update Request and Response in the XML Format	Sample Hold Update Request and Response in the XML Format on page 3905

Hold Update Response in the XML Format

The following code snippet illustrates how the tags are nested while sending the hold update response in the XML format:

```
<C1-UpdateHoldRequest>
    <requestProcessStatus></requestProcessStatus>
    <sourceSystem></sourceSystem>
    <externalTransactionId></externalTransactionId>
    <externalSourceId></externalSourceId>
    <holdRequestId></holdRequestId>
    <holdComments></holdComments>
    <holdEndDate></holdEndDate>
    <entityId></entityId>
    <entityEndDate></entityEndDate>
    <holdProcessData>
        <holdProcess></holdProcess>
        <holdProcessEndDate></holdProcessEndDate>
    </holdProcessData>
    <characteristics>
        <action></action>
        <characteristicType></characteristicType>
        <characteristicValue></characteristicValue>
        <effectiveDate></effectiveDate>
    </characteristics>
    </errormsg><errormsg>
</C1-UpdateHoldRequest>
```

Note: Here, the **C1-UpdateHoldRequest** tag represents the operation in the inbound web service which is used to call the **C1-UpdateHoldRequest** business service. This tag would change depending on the operation name specified in your SOAP or REST based inbound web service. For example, if you have set the operation name to **UpdateHoldRequest**, then the **UpdateHoldRequest** tag appears instead of the **C1-UpdateHoldRequest** tag in the above response.

Related Topics

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For more information on...	See...
Hold Update Request in the XML Format	Hold Update Request in the XML Format on page 3899
Hold Update Request and Response - Tags in XML Format	Hold Update Request and Response - Tags in XML Format on page 3901
Sample Hold Update Request and Response in the XML Format	Sample Hold Update Request and Response in the XML Format on page 3905

Hold Update Request and Response - Tags in XML Format

Note: We recommend you to refer the Hold Update Request in the XML Format on page 3899 and Hold Update Response in the XML Format on page 3900 topics in parallel while understanding the below mentioned tags. This will help you to understand how the tags are nested in the XML format.

Before calling the **C1-UpdateHoldRequest** business service through an inbound web service, you need to ensure that the hold update request contains the following tags:

Tag Name	Tag Description	Mandatory (Yes or No)
C1-UpdateHoldRequest	Used to indicate that you want to invoke the **C1-UpdateHoldRequest** business service. **Note:** Here, the **C1-UpdateHoldRequest** tag represents the operation in the inbound web service which is used to call the **C1-UpdateHoldRequest** business service. This tag would change depending on the operation name specified in your SOAP or REST based inbound web service. For example, if you have set the operation name to **UpdateHoldRequest**, then you need to specify the **UpdateHoldRequest** tag instead of the **C1-UpdateHoldRequest** tag in the hold update request.	Yes
sourceSystem	Used to indicate the external system from where the hold update request is received.	No

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Tag Name	Tag Description	Mandatory (Yes or No)
	Note: You must specify an external system which is already defined in the system. If the **Inbound Web Service History** feature is enabled, the system validates whether the specified external system matches the external system that is associated with the outbound message type specified in the **C1-IWSHIST** algorithm. If so, the system stamps the specified external system corresponding to the record in the **C1_IWS_HIST** table. If the external system is not specified in the hold update request, the system, by default, stamps the external system associated with the outbound message type (specified in the **C1-IWSHIST** algorithm) corresponding to the record in the **C1_IWS_HIST** table. For more information, see the **Inbound Web Service History** section in the *Oracle Revenue Management and Billing Administrative Guide*.	
externalTransactionId	Used to indicate the transaction in the external system through which the hold update request is received. **Note:** If the **Inbound Web Service History** feature is enabled, the system stores the external transaction ID corresponding to the record in the **C1_IWS_HIST** table.	No
externalSourceId	Used to specify the external source system ID. **Note:** If the **Inbound Web Service History** feature is enabled, the system stores the external source system ID corresponding to the record in the **C1_IWS_HIST** table.	No
holdRequestId	Used to indicate the hold request whose details you want to update. **Note:** You can only update a hold request which is in the **Active** status through an inbound web service.	Yes
holdComments	Used to specify additional information about the hold request.	No
holdEndDate	Used to specify the date till when the hold request is effective.	No

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Tag Name	Tag Description	Mandatory (Yes or No)
	Note: The hold request end date cannot be earlier than the hold request start date. You must specify the date in the **YYYY-MM-DD** format.	
entityId	Used to specify the entity ID (i.e., person, account, or bill ID).	Yes
entityEndDate	Used to specify the date till when you want to hold the entity. **Note:** You must specify the date in the **YYYY-MM-DD** format. The hold entity end date must be between hold request start and end dates and between at least one process's start and end dates. The hold entity end date cannot be earlier than the hold entity start date. At present, you can only update the end date of a single entity through a hold update request. If two or more entities are kept on hold through a hold request, you need to initiate a separate hold update request for each entity in order to update their respective end date.	Yes
holdProcessData	Used to add a new hold process or update the details of an existing hold process in the hold request.	No
holdProcess	Used to specify the process that you want to add or update in the hold request. The valid values are: • **ATPY** - Used when you want to hold the auto pay process of the entity. It is valid only when the entity level of the hold request is set to **ACCT**. • **BILL** - Used when you want to hold the bill generation process of the entity. It is valid only when the entity level of the hold request is set to **ACCT** or **PERS**. • **DELQ** - Used when you want to hold the delinquency process of the entity. It is valid only when the entity level of the hold request is set to **ACCT** or **PERS**. • **FNDG** - Used when you want to hold the funding process of the entity. It is valid only when the entity level of the hold request is set to **ACCT**, **PERS**, or **BILL**. • **OVDU** - Used when you want to hold the overdue process of the entity. It is valid only when the entity level of the hold request is set to **ACCT**.	Yes (Conditional) **Note:** This data is required when: • You want to update the end date of a hold process. • You want to add a new hold process to the hold request.

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Tag Name	Tag Description	Mandatory (Yes or No)
	• **REFD** - Used when you want to hold the refund process of the entity. It is valid only when the entity level of the hold request is set to **ACCT**. **Note:** You must specify a value which is already defined in the **HOLD_PROCESS_FLG** lookup field. It must be in the **Active** status. You cannot specify both the **OVDU** and **DELQ** processes at a time in the hold update request. The **Overdue** process is valid for the financial services and health insurance domains but the **Delinquency** process is valid only for the health insurance domain.	
holdProcessEndDate	Used to specify the date till when you want to hold the process of the entity. **Note:** You must specify the date in the **YYYY-MM-DD** format. The hold process end date must be between the hold request start and end dates. The hold process end date cannot be earlier than the hold process start date. While adding a new process to the hold request, the system does the following: • Sets the hold process start date to the hold request start date. • If you do not specify the hold process end date, the system, by default, sets it to the hold request end date.	Yes (Conditional) **Note:** This data is required when: • You want to update the end date of a hold process.
characteristics	Used to add, update, or delete a characteristic from the hold request.	No
action	Used to indicate whether you want to add, update, or delete a characteristic from the hold request. The valid values are: • **UPDATE** - Used when you want to add a new characteristic to the hold request or update the details of an existing characteristic of the hold request. The system first checks whether a characteristic with the given characteristic type and effective date combination exists for the hold request. If so, the system updates the existing characteristic of the hold request. However, if a characteristic does not exist with the given characteristic type and effective date combination for the hold request, the system creates a new characteristic for the hold request.	Yes (Conditional) **Note:** This data is required when you want to add, update, or delete a characteristic from the hold request.

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Tag Name	Tag Description	Mandatory (Yes or No)
	• **DELETE** - Used when you want to delete an existing characteristic from the hold request.	
characteristicType	Used to indicate the characteristic type.	Yes (Conditional)
	Note: You must specify a characteristic type where the characteristic entity is set to **Hold Request**.	**Note:** This data is required when you want to add, update, or delete a characteristic from the hold request.
characteristicValue	Used to specify the value for the characteristic type.	Yes (Conditional)
		Note: This data is required when you want to add, update, or delete a characteristic from the hold request.
effectiveDate	Used to specify the date from when the characteristic is effective for the hold request.	Yes (Conditional)
		Note: This data is required when you want to add, update, or delete a characteristic from the hold request.

The following table lists and describes additional tags that are included in the hold update response:

Tag Name	Tag Description
requestProcessStatus	Indicates whether the hold update request is successfully processed or not. The valid values are: • Success • Failure
errormsg	Indicates the error that occurred while updating the hold request.
	Note: This tag appears when the value in the **requestProcessStatus** tag is set to **Failure**.

Related Topics

For more information on...	See...
Sample Hold Update Request and Response in the XML Format	Sample Hold Update Request and Response in the XML Format on page 3905

Sample Hold Update Request and Response in the XML Format

Using the below example, you can update the hold end date of the bill generation and funding processes and add two characteristics for the given hold request.

Sample Hold Update Request in the XML Format

```
<C1-UpdateHoldRequest>
    <sourceSystem>SMALL_PRIME</sourceSystem>
```

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```
    <externalTransactionId>567888876677</externalTransactionId>
    <externalSourceId>656565</externalSourceId>
    <holdRequestId>100002522626</holdRequestId>
    <holdComments></holdComments>
    <holdEndDate></holdEndDate>
    <entityId>2339689532</entityId>
    <entityEndDate>2025-12-24</entityEndDate>
    <holdProcessData>
        <holdProcess>BILL</holdProcess>
        <holdProcessEndDate>2025-10-24</holdProcessEndDate>
    </holdProcessData>
    <holdProcessData>
        <holdProcess>FNDG</holdProcess>
        <holdProcessEndDate>2025-12-24</holdProcessEndDate>
    </holdProcessData>
    <characteristics>
        <action>UPDATE</action>
        <characteristicType>HOLD_TYPE</characteristicType>
        <characteristicValue>T</characteristicValue>
        <effectiveDate>2025-12-24</effectiveDate>
    </characteristics>
    <characteristics>
        <action>UPDATE</action>
        <characteristicType>ESC_PATH</characteristicType>
        <characteristicValue>01</characteristicValue>
        <effectiveDate>2025-12-24</effectiveDate>
    </characteristics>
 </C1-UpdateHoldRequest>
```

Sample Hold Update Response in the XML Format

```
<C1-UpdateHoldRequest>
    <requestProcessStatus>Success</requestProcessStatus>
    <sourceSystem>SMALL_PRIME</sourceSystem>
    <externalTransactionId>567888876677</externalTransactionId>
    <externalSourceId>656565</externalSourceId>
    <holdRequestId>100002522626</holdRequestId>
    <holdComments></holdComments>
    <holdEndDate></holdEndDate>
    <entityId>2339689532</entityId>
    <entityEndDate>2025-12-24</entityEndDate>
    <holdProcessData>
        <holdProcess>BILL</holdProcess>
        <holdProcessEndDate>2025-10-24</holdProcessEndDate>
    </holdProcessData>
    <holdProcessData>
        <holdProcess>FNDG</holdProcess>
        <holdProcessEndDate>2025-12-24</holdProcessEndDate>
    </holdProcessData>
    <characteristics>
        <action>UPDATE</action>
        <characteristicType>HOLD_TYPE</characteristicType>
        <characteristicValue>T</characteristicValue>
        <effectiveDate>2025-12-24</effectiveDate>
    </characteristics>
    <characteristics>
        <action>UPDATE</action>
        <characteristicType>ESC_PATH</characteristicType>
        <characteristicValue>01</characteristicValue>
        <effectiveDate>2025-12-24</effectiveDate>
    </characteristics>
 </C1-UpdateHoldRequest>
```

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Note: We have given the above request sample to illustrate how the tags should be nested while receiving a hold update request from the external system. However, you should not seamlessly use this sample in your environment because the required pre-requisite data may not be available in your environment. In such case, the system will give erroneous results.

Related Topics

For more information on...	See...
Hold Update Request and Response - Tags in XML Format	Hold Update Request and Response - Tags in XML Format on page 3901

Hold Update Request in the JSON Format

The following code snippet illustrates how the attribute/value pairs should be structured while receiving the hold update request in the JSON format:

```
{
   -"C1-UpdateHoldRequest": {
       -"sourceSystem": -"",
       -"externalTransactionId": -"",
       -"externalSourceId": -"",
       -"holdRequestId": -"",
       -"holdComments": -"",
       -"holdEndDate": -"",
       -"entityId": -"",
       -"entityEndDate": -"",
       -"holdProcessData": {
           -"holdProcess": -"",
           -"holdProcessEndDate": -""
       -},
       -"characteristics": {
           -"action": -"",
           -"characteristicType": -"",
           -"characteristicValue": -"",
           -"effectiveDate": -""
       -}
   -}
-}
```

Note: Here, the **C1-UpdateHoldRequest** attribute represents the operation in the inbound web service which is used to call the **C1-UpdateHoldRequest** business service. This attribute would change depending on the operation name specified in your REST based inbound web service. For example, if you have set the operation name to **UpdateHoldRequest**, then you need to specify the **UpdateHoldRequest** attribute instead of the **C1-UpdateHoldRequest** attribute in the above request.

Related Topics

For more information on...	See...
Hold Update Response in the JSON Format	Hold Update Response in the JSON Format on page 3908
Hold Update Request and Response - Attribute/Value Pairs in JSON Format	Hold Update Request and Response - Attribute/Value Pairs in JSON Format on page 3908
Sample Hold Update Request and Response in the JSON Format	Sample Hold Update Request and Response in the JSON Format on page 3913

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Hold Update Response in the JSON Format

The following code snippet illustrates how the attribute/value pairs are structured while sending the hold update response in the JSON format:

```
{
   -"C1-UpdateHoldRequest": {
       -"requestProcessStatus": -"",
       -"sourceSystem": -"",
       -"externalTransactionId": -"",
       -"externalSourceId": -"",
       -"holdRequestId": -"",
       -"holdComments": -"",
       -"holdEndDate": -"",
       -"entityId": -"",
       -"entityEndDate": -"",
       -"holdProcessData": {
           -"holdProcess": -"",
           -"holdProcessEndDate: -""
       -},
       -"characteristics": {
           -"action": -"",
           -"characteristicType": -"",
           -"characteristicValue": -"",
           -"effectiveDate": -""
       -},
       -"errormsg": -""
   -}
-}
```

Note: Here, the **C1-UpdateHoldRequest** attribute represents the operation in the inbound web service which is used to call the **C1-UpdateHoldRequest** business service. This attribute would change depending on the operation name specified in your REST based inbound web service. For example, if you have set the operation name to **UpdateHoldRequest**, then the **UpdateHoldRequest** attribute appears instead of the **C1-UpdateHoldRequest** attribute in the above response.

Related Topics

For more information on...	See...
Hold Update Request in the JSON Format	Hold Update Request in the JSON Format on page 3907
Hold Update Request and Response - Attribute/Value Pairs in JSON Format	Hold Update Request and Response - Attribute/Value Pairs in JSON Format on page 3908
Sample Hold Update Request and Response in the JSON Format	Sample Hold Update Request and Response in the JSON Format on page 3913

Hold Update Request and Response - Attribute/Value Pairs in JSON Format

Note: We recommend you to refer the Hold Update Request in the JSON Format on page 3907 and Hold Update Response in the JSON Format on page 3908 topics in parallel while understanding the below mentioned attributes. This will help you to understand how the attribute/value pairs are structured in the JSON format.

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Before calling the **C1-UpdateHoldRequest** business service through an inbound web service, you need to ensure that the hold update request contains the following attributes:

Attribute Name	Attribute Description	Mandatory (Yes or No)
C1-UpdateHoldRequest	Used to indicate that you want to invoke the **C1-UpdateHoldRequest** business service. **Note:** Here, the **C1-UpdateHoldRequest** attribute represents the operation in the inbound web service which is used to call the **C1-UpdateHoldRequest** business service. This attribute would change depending on the operation name specified in your REST based inbound web service. For example, if you have set the operation name to **UpdateHoldRequest**, then you need to specify the **UpdateHoldRequest** attribute instead of the **C1-UpdateHoldRequest** attribute in the hold update request.	Yes
sourceSystem	Used to indicate the external system from where the hold update request is received. **Note:** You must specify an external system which is already defined in the system. If the **Inbound Web Service History** feature is enabled, the system validates whether the specified external system matches the external system that is associated with the outbound message type specified in the **C1-IWSHIST** algorithm. If so, the system stamps the specified external system corresponding to the record in the **C1_IWS_HIST** table. If the external system is not specified in the hold update request, the system, by default, stamps the external system associated with the outbound message type (specified in the **C1-IWSHIST** algorithm) corresponding to the record in the **C1_IWS_HIST** table. For more information, see the **Inbound Web Service History** section in the *Oracle Revenue Management and Billing Administrative Guide*.	No
externalTransactionId	Used to indicate the transaction in the external system through which the hold update request is received. **Note:** If the **Inbound Web Service History** feature is enabled, the system stores the external transaction ID corresponding to the record in the **C1_IWS_HIST** table.	No
externalSourceId	Used to specify the external source system ID. **Note:** If the **Inbound Web Service History** feature is enabled, the system stores the external source system ID corresponding to the record in the **C1_IWS_HIST** table.	No

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Attribute Name	Attribute Description	Mandatory (Yes or No)
holdRequestId	Used to indicate hold request whose details you want to update. **Note:** You can only update a hold request which is in the **Active** status through an inbound web service.	Yes
holdComments	Used to specify additional information about the hold request.	No
holdEndDate	Used to specify the date till when the hold request is effective. **Note:** The hold request end date cannot be earlier than the hold request start date. You must specify the date in the **YYYY-MM-DD** format.	No
entityId	Used to specify the entity ID (i.e., person, account, or bill ID).	Yes
entityEndDate	Used to specify the date till when you want to hold the entity. **Note:** You must specify the date in the **YYYY-MM-DD** format. The hold entity end date must be between hold request start and end dates and between at least one process's start and end dates. The hold entity end date cannot be earlier than the hold entity start date. At present, you can only update the end date of a single entity through a hold update request. If two or more entities are kept on hold through a hold request, you need to initiate a separate hold update request for each entity in order to update their respective end date.	Yes
holdProcessData	Used to add a new hold process or update the details of an existing hold process in the hold request.	No
holdProcess	Used to specify the process that you want to add or update in the hold request. The valid values are: • **ATPY** - Used when you want to hold the auto pay process of the entity. It is valid only when the entity level of the hold request is set to **ACCT**. • **BILL** - Used when you want to hold the bill generation process of the entity. It is valid only when the entity level of the hold request is set to **ACCT** or **PERS**. • **DELQ** - Used when you want to hold the delinquency process of the entity. It is valid only when the entity level of the hold request is set to **ACCT** or **PERS**.	Yes (Conditional) **Note:** This data is required when: • You want to update the end date of a hold process. • You want to add a new hold process to the hold request.

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Attribute Name	Attribute Description	Mandatory (Yes or No)
	• **FNDG** - Used when you want to hold the funding process of the entity. It is valid only when the entity level of the hold request is set to **ACCT**, **PERS**, or **BILL**. • **OVDU** - Used when you want to hold the overdue process of the entity. It is valid only when the entity level of the hold request is set to **ACCT**. • **REFD** - Used when you want to hold the refund process of the entity. It is valid only when the entity level of the hold request is set to **ACCT**. **Note:** You must specify a value which is already defined in the **HOLD_PROCESS_FLG** lookup field. It must be in the **Active** status. You cannot specify both the **OVDU** and **DELQ** processes at a time in the hold update request. The **Overdue** process is valid for the financial services and health insurance domains but the **Delinquency** process is valid only for the health insurance domain.	
holdProcessEndDate	Used to specify the date till when you want to hold the process of the entity. **Note:** You must specify the date in the **YYYY-MM-DD** format. The hold process end date must be between the hold request start and end dates. The hold process end date cannot be earlier than the hold process start date. While adding a new process to the hold request, the system does the following: • Sets the hold process start date to the hold request start date. • If you do not specify the hold process end date, the system, by default, sets it to the hold request end date.	Yes (Conditional) **Note:** This data is required when: • You want to update the end date of a hold process.
characteristics	Used to add, update, or delete a characteristic from the hold request.	No
action	Used to indicate whether you want to add, update, or delete a characteristic from the hold request. The valid values are: • **UPDATE** - Used when you want to add a new characteristic to the hold request or update the details of an existing characteristic of the hold request. The system first checks whether a characteristic with the given characteristic type and effective date combination exists for the hold request. If so, the system updates the existing characteristic of the hold	Yes (Conditional) **Note:** This data is required when you want to add, update, or delete a characteristic from the hold request.

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Attribute Name	Attribute Description	Mandatory (Yes or No)
	request. However, if a characteristic does not exist with the given characteristic type and effective date combination for the hold request, the system creates a new characteristic for the hold request. • **DELETE** - Used when you want to delete an existing characteristic from the hold request.	
characteristicType	Used to indicate the characteristic type.	Yes (Conditional)
	Note: You must specify a characteristic type where the characteristic entity is set to **Hold Request**.	**Note:** This data is required when you want to add, update, or delete a characteristic from the hold request.
characteristicValue	Used to specify the value for the characteristic type.	Yes (Conditional)
		Note: This data is required when you want to add, update, or delete a characteristic from the hold request.
effectiveDate	Used to specify the date from when the characteristic is effective for the hold request.	Yes (Conditional)
		Note: This data is required when you want to add, update, or delete a characteristic from the hold request.

The following table lists and describes additional attributes that are included in the hold update response:

Attribute Name	Attribute Description
requestProcessStatus	Indicates whether the hold update request is successfully processed or not. The valid values are: • Success • Failure
errormsg	Indicates the error that occurred while updating the hold request.
	Note: This attribute appears when the value in the **requestProcessStatus** attribute is set to **Failure**.

Related Topics

For more information on...	See...
Sample Hold Update Request and Response in the JSON Format	Sample Hold Update Request and Response in the JSON Format on page 3913

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Sample Hold Update Request and Response in the JSON Format

Using the below example, you can update the end date of the hold request, hold entity, and hold processes and delete two characteristics for the given hold request.

Sample Hold Update Request in the JSON Format

```
{
   -"C1-UpdateHoldRequest": {
       -"sourceSystem": -"SMALL_PRIME",
       -"externalTransactionId": -"567888876699",
       -"externalSourceId": -"656565",
       -"holdRequestId": -"100002522628",
       -"holdComments": -"Disaster Recovery",
       -"holdEndDate": -"2025-01-31",
       -"entityId": -"2339689532",
       -"entityEndDate": -"2025-01-25",
       -"holdProcessData": [
       {
           -"holdProcess": -"BILL",
           -"holdProcessEndDate": -"2025-01-23"
       -},
       {
           -"holdProcess": -"FNDG",
           -"holdProcessEndDate": -"2025-01-31"
       -}
       -],
       -"characteristics": [
       {
           -"action": -"Update",
           -"characteristicType": -"HOLD_TYPE",
           -"characteristicValue": -"P",
           -"effectiveDate": -"2025-12-24"
       -},
       {
           -"action": -"Delete",
           -"characteristicType": -"ESC_PATH",
           -"characteristicValue": -"01",
           -"effectiveDate": -"2025-12-24"
       -}
       -]
    -}
 -}
```

Sample Hold Update Response in the JSON Format

```
{
   -"C1-UpdateHoldRequest": {
       -"requestProcessStatus": -"Success"
       -"sourceSystem": -"SMALL_PRIME",
       -"externalTransactionId": -"567888876699",
       -"externalSourceId": -"656565",
       -"holdRequestId": -"100002522628",
       -"holdComments": -"Disaster Recovery",
       -"holdEndDate": -"2025-01-31",
       -"entityId": -"2339689532",
       -"entityEndDate": -"2025-01-25",
       -"holdProcessData": [
       {
           -"holdProcess": -"BILL",
           -"holdProcessEndDate": -"2025-01-23"
```

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```
        -},
        {
            -"holdProcess": -"FNDG",
            -"holdProcessEndDate": -"2025-01-31"
        -}
        -],
        -"characteristics": [
        {
            -"action": -"Update",
            -"characteristicType": -"HOLD_TYPE",
            -"characteristicValue": -"P",
            -"effectiveDate": -"2025-12-24"
        -},
        {
            -"action": -"Delete",
            -"characteristicType": -"ESC_PATH",
            -"characteristicValue": -"01",
            -"effectiveDate": -"2025-12-24"
        -}
        -]
    -}
-}
```

Note: We have given the above request sample to illustrate how the attribute/value pairs should be structured while receiving a hold update request from the external system. However, you should not seamlessly use this sample in your environment because the required pre-requisite data may not be available in your environment. In such case, the system will give erroneous results.

Related Topics

For more information on...	See...
Hold Update Request and Response - Attribute/Value Pairs in JSON Format	Hold Update Request and Response - Attribute/Value Pairs in JSON Format on page 3908

C1-GetHoldRequestHistory Business Service

The **Inquire Hold Request Details** (**C1-GetHoldRequestHistory**) business service enables you to view the details of an existing hold request which is in the **Active** status. At a time, you can view the hold request details of a single entity (i.e., for a particular person, account, or bill). You can call this business service from an external system through an inbound web service. If you want to send the hold view request in the XML and/or JSON format, you need to ensure that you create a REST based inbound web service in Oracle Revenue Management and Billing. However, if you want to send the hold view request in the XML format, you can create a SOAP or REST based inbound web service in Oracle Revenue Management and Billing.

While sending the hold view request, you need to specify the following details:

- Entity (i.e., Person, Account, or Bill) whose hold requests you want to view.
- Entity identifiers or entity ID when the entity is an account or a person, and the entity ID when the entity is a bill.

In addition, you can specify the following filter criteria – Hold Request Start Date, Hold Request End Date, Hold Reason, and Hold Process. On specifying the hold process, the system fetches one or more active hold requests of the entity with the given hold process. This hold request may have one or more hold processes including the given hold process.

Once the hold view request is processed through an inbound web service, the system displays the details of one or more active hold requests that meet the search criteria. If an error occurs while retrieving the hold requests for the entity, the

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system sends the error message in the response. The system enables you to track the hold view response sent to the external system using the **Inbound Web Service History** feature.

For more information, see the **Inbound Web Service History** section in the *Oracle Revenue Management and Billing Administrative Guide*.

Related Topics

For more information on...	See...
Hold View Request in the XML Format	Hold View Request in the XML Format on page 3915
Hold View Response in the XML Format	Hold View Response in the XML Format on page 3916
Hold View Request in the JSON Format	Hold View Request in the JSON Format on page 3922
Hold View Response in the JSON Format	Hold View Response in the JSON Format on page 3923
Hold View Request and Response - Tags in XML Format	Hold View Request and Response - Tags in XML Format on page 3917
Hold View Request and Response - Attribute/Value Pairs in JSON Format	Hold View Request and Response - Attribute/Value Pairs in JSON Format on page 3924
Sample Hold View Request and Response in the XML Format	Sample Hold View Request and Response in the XML Format on page 3921
Sample Hold View Request and Response in the JSON Format	Sample Hold View Request and Response in the JSON Format on page 3928

Prerequisites

To view the hold requests of an entity through an inbound web service, you need to do the following:

- Define a REST or SOAP based inbound web service to call the **C1-GetHoldRequestHistory** business service where **HTTP Method** is set to **Post** and **URI Component** is set to **/inquire**.
- Authorize the ORMB user to access the required application service.
- Define the required source systems in the **C1-SourceSystemLookup** extendable lookup.
- Define the required person or account identifier types in the system.
- Define the required values for the **HOLD_REASON_FLG**, **HOLD_ENTITY_LVL_FLG**, and **HOLD_PROCESS_FLG** lookup fields.

Hold View Request in the XML Format

The following code snippet illustrates how the tags should be nested while receiving the hold view request in the XML format:

```
<C1-GetHoldRequestHistory>
    <getHoldReqHistRequest>
        <sourceSystem></sourceSystem>
        <externalSourceId></externalSourceId>
        <c1ExternalTransactionId></c1ExternalTransactionId>
        <getHoldReqStartDt></getHoldReqStartDt>
```

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```
        <getHoldReqEndDt></getHoldReqEndDt>
        <getHoldReqEntity></getHoldReqEntity>
        <getHoldReqReason></getHoldReqReason>
        <getHoldReqEntIdentType></getHoldReqEntIdentType>
        <getHoldReqEntIdentValue></getHoldReqEntIdentValue>
        <getHoldReqEntityId></getHoldReqEntityId>
        <getHoldReqProcess></getHoldReqProcess>
    </getHoldReqHistRequest>
</C1-GetHoldRequestHistory>
```

Note: Here, the **C1-GetHoldRequestHistory** tag represents the operation in the inbound web service which is used to call the **C1-GetHoldRequestHistory** business service. This tag would change depending on the operation name specified in your SOAP or REST based inbound web service. For example, if you have set the operation name to **GetHoldRequestHistory**, then you need to specify the **GetHoldRequestHistory** tag instead of the **C1-GetHoldRequestHistory** tag in the above request.

Related Topics

For more information on...	See...
Hold View Response in the XML Format	Hold View Response in the XML Format on page 3916
Hold View Request and Response - Tags in XML Format	Hold View Request and Response - Tags in XML Format on page 3917
Sample Hold View Request and Response in the XML Format	Sample Hold View Request and Response in the XML Format on page 3921

Hold View Response in the XML Format

The following code snippet illustrates how the tags are nested while sending the hold view response in the XML format:

```
<C1-GetHoldRequestHistory>
    <getHoldReqHistRequest>
        <sourceSystem></sourceSystem>
        <externalSourceId></externalSourceId>
        <c1ExternalTransactionId></c1ExternalTransactionId>
        <getHoldReqStartDt></getHoldReqStartDt>
        <getHoldReqEndDt></getHoldReqEndDt>
        <getHoldReqEntity></getHoldReqEntity>
        <getHoldReqReason></getHoldReqReason>
        <getHoldReqEntIdentType></getHoldReqEntIdentType>
        <getHoldReqEntIdentValue></getHoldReqEntIdentValue>
        <getHoldReqEntityId></getHoldReqEntityId>
        <getHoldReqProcess></getHoldReqProcess>
    </getHoldReqHistRequest>
    <holdReqHistResponse>
        <statusCd></statusCd>
        <messageText></messageText>
        <holdReqHistList>
            <holdReqId></holdReqId>
            <holdReqStartDt></holdReqStartDt>
            <holdReqEndDt></holdReqEndDt>
            <holdReqStatus></holdReqStatus>
            <holdReqType></holdReqType>
            <holdReqReason></holdReqReason>
            <holdReqEntity></holdReqEntity>
            <holdReqProcesses></holdReqProcesses>
        </holdReqHistList>
```

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```
    </holdReqHistResponse>
</C1-GetHoldRequestHistory>
```

Note: Here, the **C1-GetHoldRequestHistory** tag represents the operation in the inbound web service which is used to call the **C1-GetHoldRequestHistory** business service. This tag would change depending on the operation name specified in your SOAP or REST based inbound web service. For example, if you have set the operation name to **GetHoldRequestHistory**, then the **GetHoldRequestHistory** tag appears instead of the **C1-GetHoldRequestHistory** tag in the above response.

Related Topics

For more information on...	See...
Hold View Request in the XML Format	Hold View Request in the XML Format on page 3915
Hold View Request and Response - Tags in XML Format	Hold View Request and Response - Tags in XML Format on page 3917
Sample Hold View Request and Response in the XML Format	Sample Hold View Request and Response in the XML Format on page 3921

Hold View Request and Response - Tags in XML Format

Note: We recommend you to refer the Hold View Request in the XML Format on page 3915 and Hold View Response in the XML Format on page 3916 topics in parallel while understanding the below mentioned tags. This will help you to understand how the tags are nested in the XML format.

Before calling the **C1-GetHoldRequestHistory** business service through an inbound web service, you need to ensure that the hold view request contains the following tags:

Tag Name	Tag Description	Mandatory (Yes or No)
C1-GetHoldRequestHistory	Used to indicate that you want to invoke the **C1-GetHoldRequestHistory** business service. **Note:** Here, the **C1-GetHoldRequestHistory** tag represents the operation in the inbound web service which is used to call the **C1-GetHoldRequestHistory** business service. This tag would change depending on the operation name specified in your SOAP or REST based inbound web service. For example, if you have set the operation name to **GetHoldRequestHistory**, then you need to specify the **GetHoldRequestHistory** tag instead of the **C1-GetHoldRequestHistory** tag in the hold view request.	Yes
getHoldReqHistRequest	Used to specify additional criteria along with the details of the entity whose hold requests you want to view.	Yes
sourceSystem	Used to indicate the external system from where the hold view request is received.	No

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Tag Name	Tag Description	Mandatory (Yes or No)
	Note: You must specify an external system which is already defined in the system. If the **Inbound Web Service History** feature is enabled, the system validates whether the specified external system matches the external system that is associated with the outbound message type specified in the **C1-IWSHIST** algorithm. If so, the system stamps the specified external system corresponding to the record in the **C1_IWS_HIST** table. If the external system is not specified in the hold view request, the system, by default, stamps the external system associated with the outbound message type (specified in the **C1-IWSHIST** algorithm) corresponding to the record in the **C1_IWS_HIST** table. For more information, see the **Inbound Web Service History** section in the *Oracle Revenue Management and Billing Administrative Guide*.	
c1ExternalTransactionId	Used to indicate the transaction in the external system through which the hold view request is received. **Note:** If the **Inbound Web Service History** feature is enabled, the system stores the external transaction ID corresponding to the record in the **C1_IWS_HIST** table.	No
externalSourceId	Used to specify the external source system ID. **Note:** If the **Inbound Web Service History** feature is enabled, the system stores the external source system ID corresponding to the record in the **C1_IWS_HIST** table.	No
getHoldReqStartDt	Used when you want to view hold requests which are effective from a particular date onwards. **Note:** You must specify the date in the **YYYY-MM-DD** format. The date should be earlier than the date specified in the **getHoldReqEndDt** tag.	No
getHoldReqEndDt	Used when you want to view hold requests which are effective till a particular date.	No

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Tag Name	Tag Description	Mandatory (Yes or No)
	Note: You must specify the date in the **YYYY-MM-DD** format. The date should be later than the date specified in the **getHoldReqStartDt** tag.	
getHoldReqEntity	Used to indicate the type of entity whose hold requests you want to view. The valid values are: • **ACCT** - Used when you want to view hold requests through which an account is kept on hold. • **BILL** - Used when you want to view hold requests through which a bill is kept on hold. • **PERS** - Used when you want to view hold requests through which a person is kept on hold. **Note:** You must specify a value which is already defined in the **HOLD_ENTITY_LVL_FLG** lookup field. It must be in the **Active** status.	Yes
getHoldReqReason	Used when you want to view hold requests which are created for a particular reason. **Note:** You must specify a value which is already defined in the **HOLD_REASON_FLG** lookup field. It must be in the **Active** status.	No
getHoldReqEntIdentType	Used to specify the person or account identifier type. **Note:** You must specify a person or account identifier type which is already defined in the system. It should be a primary identifier type for the respective entity.	Yes (Conditional) **Note:** This data is required when: • **ACCT** or **PERS** is specified in the **getHoldReqEntity** tag. • The value is not specified in the **getHoldReqEntityId** tag.
getHoldReqEntIdentValue	Used to specify the entity identifier (i.e., person or account identifier). It should be the primary identifier of the respective entity. **Note:** The system then derives the person or account ID using the given primary entity identifier details, and accordingly fetches the hold requests of the respective entity.	Yes (Conditional) **Note:** This data is required when: • **ACCT** or **PERS** is specified in the **getHoldReqEntity** tag. • The value is not specified in the **getHoldReqEntityId** tag.
getHoldReqEntityId	Used to specify the entity ID (i.e., person, account, or bill ID).	Yes (Conditional)

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Tag Name	Tag Description	Mandatory (Yes or No)
		Note: This data is required when: • **ACCT** or **PERS** is specified in the **getHoldReqEntity** tag and the values are not specified in the **getHoldReqEntIdentType** and **getHoldReqEntIdentValue** tags. • **BILL** is specified in the **getHoldReqEntity** tag.
getHoldReqProcess	Used when you want to view hold requests where the given processes are kept on hold. The valid values are: • ATPY • BILL • DELQ • FNDG • OVDU • REFD **Note:** You must specify a value which is already defined in the **HOLD_PROCESS_FLG** lookup field. It must be in the **Active** status.	No

The following table lists and describes additional tags that are included in the hold view response:

Tag Name	Tag Description
holdReqHistResponse	Displays the response received for the hold view request.
statusCd	Indicates whether the hold view request is successfully processed or not. The valid values are: • Success • Failure
messageText	Indicates the error that occurred while retrieving the hold requests for the entity. **Note:** This tag appears when the value in the **statusCd** tag is set to **Failure**.
holdReqHistList	Displays the details of a hold request. **Note:** This tag appears when the value in the **statusCd** tag is set to **Success**.
holdRequestId	Displays the hold request ID.
holdReqStartDt	Displays the date from when the hold request is effective.
holdReqEndDt	Displays the date till when the hold request is effective.
holdStatus	Indicates the status of the hold request. The valid value is: • Active

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Tag Name	Tag Description
holdReqType	Indicates the hold request type using which the hold request is created.
holdReqReason	Indicates the reason why the entity is kept on hold.
holdReqEntity	Indicates the entity for which the hold request is created.
holdReqProcesses	Indicates the process which is kept on hold. The valid values are: • Auto Pay • Bill Generation • Delinquency • Funding • Overdue • Refund **Note:** If multiple processes are kept on hold for an entity through the hold request, a comma-separated list of hold processes appears in the tag.

Related Topics

For more information on...	See...
Sample Hold View Request and Response in the XML Format	Sample Hold View Request and Response in the XML Format on page 3921

Sample Hold View Request and Response in the XML Format

Using the below example, you can view hold requests which are created for an account with the specified hold reason.

Sample Hold View Request in the XML Format

```
<C1-GetHoldRequestHistory>
    <getHoldReqHistRequest>
        <sourceSystem>SMALL_PRIME</sourceSystem>
        <externalSourceId>656565</externalSourceId>
        <c1ExternalTransactionId>567888876611</c1ExternalTransactionId>
        <getHoldReqStartDt></getHoldReqStartDt>
        <getHoldReqEndDt></getHoldReqEndDt>
        <getHoldReqEntity>ACCT</getHoldReqEntity>
        <getHoldReqReason>DSRE</getHoldReqReason>
        <getHoldReqEntIdentType>IBAN</getHoldReqEntIdentType>
        <getHoldReqEntIdentValue>XX00XXXX111111</getHoldReqEntIdentValue>
        <getHoldReqEntityId></getHoldReqEntityId>
        <getHoldReqProcess></getHoldReqProcess>
    </getHoldReqHistRequest>
</C1-GetHoldRequestHistory>
```

Sample Hold View Response in the XML Format

```
<C1-GetHoldRequestHistory>
    <getHoldReqHistRequest>
        <sourceSystem>SMALL_PRIME</sourceSystem>
        <externalSourceId>656565</externalSourceId>
        <c1ExternalTransactionId>567888876611</c1ExternalTransactionId>
        <getHoldReqStartDt></getHoldReqStartDt>
        <getHoldReqEndDt></getHoldReqEndDt>
        <getHoldReqEntity>ACCT</getHoldReqEntity>
```

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```
        <getHoldReqReason>DSRE</getHoldReqReason>
        <getHoldReqEntIdentType>IBAN</getHoldReqEntIdentType>
        <getHoldReqEntIdentValue>XX00XXXX111111</getHoldReqEntIdentValue>
        <getHoldReqEntityId></getHoldReqEntityId>
        <getHoldReqProcess></getHoldReqProcess>
    </getHoldReqHistRequest>
    <holdReqHistResponse>
        <statusCd>Success</statusCd>
        <holdReqHistList>
            <holdReqId>110060465751</holdReqId>
            <holdReqStartDt>2025-01-01</holdReqStartDt>
            <holdReqEndDt>2025-01-31</holdReqEndDt>
            <holdReqStatus>Active</holdReqStatus>
            <holdReqType>HOLD_WITHOUT_APPROVAL</holdReqType>
            <holdReqReason>Disaster Recovery</holdReqReason>
            <holdReqEntity>9571248085</holdReqEntity>
            <holdReqProcesses>Auto Pay</holdReqProcesses>
        </holdReqHistList>
    </holdReqHistResponse>
</C1-GetHoldRequestHistory>
```

Note: We have given the above request sample to illustrate how the tags should be nested while receiving a hold view request from the external system. However, you should not seamlessly use this sample in your environment because the required pre-requisite data may not be available in your environment. In such case, the system will give erroneous results.

Related Topics

For more information on...	See...
Hold View Request and Response - Tags in XML Format	Hold View Request and Response - Tags in XML Format on page 3917

Hold View Request in the JSON Format

The following code snippet illustrates how the attribute/value pairs should be structured while receiving the hold view request in the JSON format:

```
{
   -"C1-GetHoldRequestHistory": {
       -"getHoldReqHistRequest": {
           -"sourceSystem": -"",
           -"externalSourceId": -"",
           -"c1ExternalTransactionId": -"",
           -"getHoldReqStartDt": -"",
           -"getHoldReqEndDt": -"",
           -"getHoldReqEntity": -"",
           -"getHoldReqReason": -"",
           -"getHoldReqEntIdentType": -"",
           -"getHoldReqEntIdentValue": -"",
           -"getHoldReqEntityId": -"",
           -"getHoldReqProcess": -""
       -}
   -}
-}
```

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Note: Here, the **C1-GetHoldRequestHistory** attribute represents the operation in the inbound web service which is used to call the **C1-GetHoldRequestHistory** business service. This attribute would change depending on the operation name specified in your REST based inbound web service. For example, if you have set the operation name to **GetHoldRequestHistory**, then you need to specify the **GetHoldRequestHistory** attribute instead of the **C1-GetHoldRequestHistory** attribute in the above request.

Related Topics

For more information on...	See...
Hold View Response in the JSON Format	Hold View Response in the JSON Format on page 3923
Hold View Request and Response - Attribute/Value Pairs in JSON Format	Hold View Request and Response - Attribute/Value Pairs in JSON Format on page 3924
Sample Hold View Request and Response in the JSON Format	Sample Hold View Request and Response in the JSON Format on page 3928

Hold View Response in the JSON Format

The following code snippet illustrates how the attribute/value pairs are structured while sending the hold view response in the JSON format:

```
{
   -"C1-GetHoldRequestHistory": {
       -"getHoldReqHistRequest": {
           -"sourceSystem": -"",
           -"externalSourceId": -"",
           -"c1ExternalTransactionId": -"",
           -"getHoldReqStartDt": -"",
           -"getHoldReqEndDt": -"",
           -"getHoldReqEntity": -"",
           -"getHoldReqReason": -"",
           -"getHoldReqEntIdentType": -"",
           -"getHoldReqEntIdentValue": -"",
           -"getHoldReqEntityId": -"",
           -"getHoldReqProcess": -""
       -},
       -"holdReqHistResponse": {
           -"statusCd": -"",
           -"messageText": -"",
           -"holdReqHistList": {
               -"holdReqId": -"",
               -"holdReqStartDt": -"",
               -"holdReqEndDt": -"",
               -"holdReqStatus": -"",
               -"holdReqType": -"",
               -"holdReqReason": -"",
               -"holdReqEntity": -"",
               -"holdReqProcesses": -""
       -}
   -}
-}
```

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Note: Here, the **C1-GetHoldRequestHistory** attribute represents the operation in the inbound web service which is used to call the **C1-GetHoldRequestHistory** business service. This attribute would change depending on the operation name specified in your REST based inbound web service. For example, if you have set the operation name to **GetHoldRequestHistory**, then the **GetHoldRequestHistory** attribute appears instead of the **C1-GetHoldRequestHistory** attribute in the above response.

Related Topics

For more information on...	See...
Hold View Request in the JSON Format	Hold View Request in the JSON Format on page 3922
Hold View Request and Response - Attribute/Value Pairs in JSON Format	Hold View Request and Response - Attribute/Value Pairs in JSON Format on page 3924
Sample Hold View Request and Response in the JSON Format	Sample Hold View Request and Response in the JSON Format on page 3928

Hold View Request and Response - Attribute/Value Pairs in JSON Format

Note: We recommend you to refer the Hold View Request in the JSON Format on page 3922 and Hold View Response in the JSON Format on page 3923 topics in parallel while understanding the below mentioned attributes. This will help you to understand how the attribute/value pairs are structured in the JSON format.

Before calling the **C1-GetHoldRequestHistory** business service through an inbound web service, you need to ensure that the hold view request contains the following attributes:

Attribute Name	Attribute Description	Mandatory (Yes or No)
C1-GetHoldRequestHistory	Used to indicate that you want to invoke the **C1-GetHoldRequestHistory** business service. **Note:** Here, the **C1-GetHoldRequestHistory** attribute represents the operation in the inbound web service which is used to call the **C1-GetHoldRequestHistory** business service. This attribute would change depending on the operation name specified in your REST based inbound web service. For example, if you have set the operation name to **GetHoldRequestHistory**, then you need to specify the **GetHoldRequestHistory** attribute instead of the **C1-GetHoldRequestHistory** attribute in the hold view request.	Yes
getHoldReqHistRequest	Used to specify additional criteria along with the details of the entity whose hold requests you want to view.	Yes
sourceSystem	Used to indicate the external system from where the hold view request is received.	No

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Attribute Name	Attribute Description	Mandatory (Yes or No)
	Note: You must specify an external system which is already defined in the system. If the **Inbound Web Service History** feature is enabled, the system validates whether the specified external system matches the external system that is associated with the outbound message type specified in the **C1-IWSHIST** algorithm. If so, the system stamps the specified external system corresponding to the record in the **C1_IWS_HIST** table. If the external system is not specified in the hold view request, the system, by default, stamps the external system associated with the outbound message type (specified in the **C1-IWSHIST** algorithm) corresponding to the record in the **C1_IWS_HIST** table. For more information, see the **Inbound Web Service History** section in the *Oracle Revenue Management and Billing Administrative Guide*.	
c1ExternalTransactionId	Used to indicate the transaction in the external system through which the hold view request is received. **Note:** If the **Inbound Web Service History** feature is enabled, the system stores the external transaction ID corresponding to the record in the **C1_IWS_HIST** table.	No
externalSourceId	Used to specify the external source system ID. **Note:** If the **Inbound Web Service History** feature is enabled, the system stores the external source system ID corresponding to the record in the **C1_IWS_HIST** table.	No
getHoldReqStartDt	Used when you want to view hold requests which are effective from a particular date onwards. **Note:** You must specify the date in the **YYYY-MM-DD** format. The date should be earlier than the date specified in the **getHoldReqEndDt** attribute.	No
getHoldReqEndDt	Used when you want to view hold requests which are effective till a particular date.	No

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Attribute Name	Attribute Description	Mandatory (Yes or No)
	Note: You must specify the date in the **YYYY-MM-DD** format. The date should be later than the date specified in the **getHoldReqStartDt** attribute.	
getHoldReqEntity	Used to indicate the type of entity whose hold requests you want to view. The valid values are: • **ACCT** - Used when you want to view hold requests through which an account is kept on hold. • **BILL** - Used when you want to view hold requests through which a bill is kept on hold. • **PERS** - Used when you want to view hold requests through which a person is kept on hold. **Note:** You must specify a value which is already defined in the **HOLD_ENTITY_LVL_FLG** lookup field. It must be in the **Active** status.	Yes
getHoldReqReason	Used when you want to view hold requests which are created for a particular reason. **Note:** You must specify a value which is already defined in the **HOLD_REASON_FLG** lookup field. It must be in the **Active** status.	No
getHoldReqEntIdentType	Used to specify the person or account identifier type. **Note:** You must specify a person or account identifier type which is already defined in the system. It should be a primary identifier type for the respective entity.	Yes (Conditional) **Note:** This data is required when: • **ACCT** or **PERS** is specified in the **getHoldReqEntity** attribute. • The value is not specified in the **getHoldReqEntityId** attribute.
getHoldReqEntIdentValue	Used to specify the entity identifier (i.e., person or account identifier). It should be the primary identifier of the respective entity. **Note:** The system then derives the person or account ID using the given primary entity identifier details, and accordingly fetches the hold requests of the respective entity.	Yes (Conditional) **Note:** This data is required when: • **ACCT** or **PERS** is specified in the **getHoldReqEntity** attribute. • The value is not specified in the **getHoldReqEntityId** attribute.
getHoldReqEntityId	Used to specify the entity ID (i.e., person, account, or bill ID).	Yes (Conditional)

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Attribute Name	Attribute Description	Mandatory (Yes or No)
		Note: This data is required when: • **ACCT** or **PERS** is specified in the **getHoldReqEntity** attribute and the values are not specified in the **getHoldReqEntIdentType** and **getHoldReqEntIdentValue** attributes. • **BILL** is specified in the **getHoldReqEntity** attribute.
getHoldReqProcess	Used when you want to view hold requests where the given processes are kept on hold. The valid values are: • ATPY • BILL • DELQ • FNDG • OVDU • REFD **Note:** You must specify a value which is already defined in the **HOLD_PROCESS_FLG** lookup field. It must be in the **Active** status.	No

The following table lists and describes additional attributes that are included in the hold view response:

Attribute Name	Attribute Description
holdReqHistResponse	Displays the response received for the hold view request.
statusCd	Indicates whether the hold view request is successfully processed or not. The valid values are: • Success • Failure
messageText	Indicates the error that occurred while retrieving the hold requests for the entity. **Note:** This attribute appears when the value in the **statusCd** attribute is set to **Failure**.
holdReqHistList	Displays the details of a hold request. **Note:** This attribute appears when the value in the **statusCd** attribute is set to **Success**.
holdRequestId	Displays the hold request ID.
holdReqStartDt	Displays the date from when the hold request is effective.
holdReqEndDt	Displays the date till when the hold request is effective.
holdStatus	Indicates the status of the hold request. The valid value is: • Active

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Attribute Name	Attribute Description
holdReqType	Indicates the hold request type using which the hold request is created.
holdReqReason	Indicates the reason why the entity is kept on hold.
holdReqEntity	Indicates the entity for which the hold request is created.
holdReqProcesses	Indicates the process which is kept on hold. The valid values are: • Auto Pay • Bill Generation • Delinquency • Funding • Overdue • Refund **Note:** If multiple processes are kept on hold for an entity through the hold request, a comma-separated list of hold processes appears in the attribute.

Related Topics

For more information on...	See...
Sample Hold View Request and Response in the JSON Format	Sample Hold View Request and Response in the JSON Format on page 3928

Sample Hold View Request and Response in the JSON Format

Using the below example, you can view hold requests which are created for a bill and are effective from a particular date.

Sample Hold View Request in the JSON Format

```
{
   -"C1-GetHoldRequestHistory": {
       -"getHoldReqHistRequest": {        '
           -"sourceSystem": -"SMALL_PRIME",
           -"externalSourceId": -"656565",
           -"c1ExternalTransactionId": -"567888876600",
           -"getHoldReqStartDt": -"2025-01-01",
           -"getHoldReqEndDt": -"",
           -"getHoldReqEntity": -"BILL",
           -"getHoldReqReason": -"",
           -"getHoldReqEntIdentType": -"",
           -"getHoldReqEntIdentValue": -"",
           -"getHoldReqEntityId": -"2339633684",
           -"getHoldReqProcess": -""
       -}
   -}
-}
```

Sample Hold View Response in the JSON Format

```
{
   -"C1-GetHoldRequestHistory": {
       -"getHoldReqHistRequest": {
           -"sourceSystem": -"SMALL_PRIME",
           -"externalSourceId": -"656565",
           -"c1ExternalTransactionId": -"567888876600",
```

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```
            -"getHoldReqStartDt": -"2025-01-01",
            -"getHoldReqEndDt": -"",
            -"getHoldReqEntity": -"BILL",
            -"getHoldReqReason": -"",
            -"getHoldReqEntIdentType": -"",
            -"getHoldReqEntIdentValue": -"",
            -"getHoldReqEntityId": -"2339633684",
            -"getHoldReqProcess": -""
        -}
        -"holdReqHistResponse": {
            -"statusCd": -"Success",
            -"holdReqHistList": [
               {            '
                -"holdReqId": -"588586064410",
                -"holdReqStartDt": -"2025-01-01",
                -"holdReqEndDt": -"2025-01-31",
                -"holdReqStatus": -"Active",
                -"holdReqType": -"HOLD_WITHOUT_APPROVAL",
                -"holdReqReason": -"Disaster Recovery",
                -"holdReqEntity": -"2339633684",
                -"holdReqProcesses": -"Funding"
               -},
               {
                -"holdReqId": -"588586064411",
                -"holdReqStartDt": -"2025-03-01",
                -"holdReqEndDt": -"2025-03-31",
                -"holdReqStatus": -"Active",
                -"holdReqType": -"HOLD_WITHOUT_APPROVAL",
                -"holdReqReason": -"Disaster Recovery",
                -"holdReqEntity": -"2339633684",
                -"holdReqProcesses": -"Funding"
               -}
            -]
        -}
    -}
-}
```


Note: We have given the above request sample to illustrate how the attribute/value pairs should be structured while receiving a hold view request from the external system. However, you should not seamlessly use this sample in your environment because the required pre-requisite data may not be available in your environment. In such case, the system will give erroneous results.

Related Topics

For more information on...	See...
Hold View Request and Response - Attribute/Value Pairs in JSON Format	Hold View Request and Response - Attribute/Value Pairs in JSON Format on page 3924

C1-ReleaseHoldRequest Business Service

The **Release Hold Request** (**C1-ReleaseHoldRequest**) business service enables you to release an existing hold request which is in the **Active** status. You can call this business service from an external system through an inbound web service. At present, you can release a hold request through an inbound web service only when it has a single entity (i.e., a particular person, account, or bill) in the hold request. If you want to send the hold release request in the XML and/or JSON format, you need to ensure that you create a REST based inbound web service in Oracle Revenue Management and Billing. However, if you want to send the hold release request in the XML format, you can create a SOAP or REST based inbound web service in Oracle Revenue Management and Billing.

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While sending the hold release request, you need to specify the following details:

- Hold Request ID
- Hold release reason and comments, if any

Note:

You must specify a reason which is already defined for the **Released** status of the **C1-HoldRequest** business object through the **Status Reason** screen.

You can release a hold request through an inbound web service only when the release approval process is not configured on the respective hold request type.

You cannot release a hold request through an inbound web service when the hold request start date is later than the system date or when the system date is later than the hold request end date.

If you want to release a hold request with multiple entities, you can opt to update the end date of each entity in the hold request through **C1-UpdateHoldRequest** business service by calling it separately for each entity of the hold request. Once the end date of all the entities in the hold request is updated through an inbound web service, you can then execute the **C1-HLMON** batch for necessary updates. For more information about the batch, see *Oracle Revenue Management and Billing Batch Guide*. Alternatively, you can release a hold request with multiple entities from the user interface.

Once the hold request is released through an inbound web service, the status of the hold request is set to **Released**. In addition, the hold request end date is set to the system date. If an error occurs while releasing the hold request, the system sends the error message in the response. The system enables you to track the hold release response sent to the external system using the **Inbound Web Service History** feature.

For more information, see the **Inbound Web Service History** section in the *Oracle Revenue Management and Billing Administrative Guide*.

Related Topics

For more information on...	See...
Hold Release Request in the XML Format	Hold Release Request in the XML Format on page 3931
Hold Release Response in the XML Format	Hold Release Response in the XML Format on page 3932
Hold Release Request in the JSON Format	Hold Release Request in the JSON Format on page 3935
Hold Release Response in the JSON Format	Hold Release Response in the JSON Format on page 3936
Hold Release Request and Response - Tags in XML Format	Hold Release Request and Response - Tags in XML Format on page 3932
Hold Release Request and Response - Attribute/Value Pairs in JSON Format	Hold Release Request and Response - Attribute/Value Pairs in JSON Format on page 3936
Sample Hold Release Request and Response in the XML Format	Sample Hold Release Request and Response in the XML Format on page 3934
Sample Hold Release Request and Response in the JSON Format	Sample Hold Release Request and Response in the JSON Format on page 3938

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Prerequisites

To release a hold request through an inbound web service, you need to do the following:

- Define a REST or SOAP based inbound web service to call the **C1-ReleaseHoldRequest** business service where the **HTTP Method** is set to **Post** and the **URI Component** is set to **/releaseHold**.
- Authorize the ORMB user to access the required application service
- Define the required hold request type where the **Release Approval** option is not selected and the status is set to **Active**.
- Define the required values for the **HOLD_REASON_FLG** lookup field.
- Define the required values for the **HOLD_ENTITY_LVL_FLG** lookup field.
- Define the required values for the **HOLD_PROCESS_FLG** lookup field.
- Define the required characteristic types where the characteristic entity is set to **Hold Request**
- Reasons defined for the **Released** status of the **C1-HoldRequest** business object in the **Status Reason** screen

Related Topics

For more information on...	See...
How to setup the **C1-HOLDSRCH** feature configuration	Setting the C1-HOLDSRCH Feature Configuration on page 1888

Hold Release Request in the XML Format

The following code snippet illustrates how the tags should be nested while receiving the hold release request in the XML format:

```
<C1-ReleaseHoldRequest>
    <sourceSystem></sourceSystem>
    <externalTransactionId></externalTransactionId>
    <externalSourceId></externalSourceId>
    <holdRequestId></holdRequestId>
    <holdReleaseReason></holdReleaseReason>
    <holdComments></holdComments>
 </C1-ReleaseHoldRequest>
```

Note: Here, the **C1-ReleaseHoldRequest** tag represents the operation in the inbound web service which is used to call the **C1-ReleaseHoldRequest** business service. This tag would change depending on the operation name specified in your SOAP or REST based inbound web service. For example, if you have set the operation name to **ReleaseHoldRequest**, then you need to specify the **ReleaseHoldRequest** tag instead of the **C1-ReleaseHoldRequest** tag in the above request.

Related Topics

For more information on...	See...
Hold Release Response in the XML Format	Hold Release Response in the XML Format on page 3932
Hold Release Request and Response - Tags in XML Format	Hold Release Request and Response - Tags in XML Format on page 3932

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For more information on...	See...
Sample Hold Release Request and Response in the XML Format	Sample Hold Release Request and Response in the XML Format on page 3934

Hold Release Response in the XML Format

The following code snippet illustrates how the tags are nested while sending the hold release response in the XML format:

```
<C1-ReleaseHoldRequest>
    <requestProcessStatus></requestProcessStatus>
    <sourceSystem></sourceSystem>
    <externalTransactionId></externalTransactionId>
    <externalSourceId></externalSourceId>
    <holdRequestId></holdRequestId>
    <holdReleaseReason></holdReleaseReason>
    <holdComments></holdComments>
    <holdEndDate></holdEndDate>
    <holdRequestStatus></holdRequestStatus>
    <errormsg></errormsg>
 </C1-ReleaseHoldRequest>
```

Note: Here, the **C1-ReleaseHoldRequest** tag represents the operation in the inbound web service which is used to call the **C1-ReleaseHoldRequest** business service. This tag would change depending on the operation name specified in your SOAP or REST based inbound web service. For example, if you have set the operation name to **ReleaseHoldRequest**, then the **ReleaseHoldRequest** tag appears instead of the **C1-ReleaseHoldRequest** tag in the above response.

Related Topics

For more information on...	See...
Hold Release Request in the XML Format	Hold Release Request in the XML Format on page 3931
Hold Release Request and Response - Tags in XML Format	Hold Release Request and Response - Tags in XML Format on page 3932
Sample Hold Release Request and Response in the XML Format	Sample Hold Release Request and Response in the XML Format on page 3934

Hold Release Request and Response - Tags in XML Format

Note: We recommend you to refer the Hold Release Request in the XML Format on page 3931 andHold Release Response in the XML Format on page 3932 topics in parallel while understanding the below mentioned tags. This will help you to understand how the tags are nested in the XML format.

Before calling the **C1-ReleaseHoldRequest** business service through an inbound web service, you need to ensure that the hold release request contains the following tags:

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Tag Name	Tag Description	Mandatory (Yes or No)
C1-ReleaseHoldRequest	Used to indicate that you want to invoke the **C1-ReleaseHoldRequest** business service. **Note:** Here, the **C1-ReleaseHoldRequest** tag represents the operation in the inbound web service which is used to call the **C1-ReleaseHoldRequest** business service. This tag would change depending on the operation name specified in your SOAP or REST based inbound web service. For example, if you have set the operation name to **ReleaseHoldRequest**, then you need to specify the **ReleaseHoldRequest** tag instead of the **C1-ReleaseHoldRequest** tag in the hold release request.	Yes
sourceSystem	Used to indicate the external system from where the hold release request is received. **Note:** You must specify an external system which is already defined in the system. If the **Inbound Web Service History** feature is enabled, the system validates whether the specified external system matches the external system that is associated with the outbound message type specified in the **C1-IWSHIST** algorithm. If so, the system stamps the specified external system corresponding to the record in the **C1_IWS_HIST** table. If the external system is not specified in the hold creation request, the system, by default, stamps the external system associated with the outbound message type (specified in the **C1-IWSHIST** algorithm) corresponding to the record in the **C1_IWS_HIST** table. For more information, see the **Inbound Web Service History** section in the *Oracle Revenue Management and Billing Administrative Guide*.	No
externalTransactionId	Used to indicate the transaction in the external system through which the hold release request is received. **Note:** If the **Inbound Web Service History** feature is enabled, the system stores the external transaction ID corresponding to the record in the **C1_IWS_HIST** table.	No
externalSourceId	Used to specify the external source system ID. **Note:** If the **Inbound Web Service History** feature is enabled, the system stores the external source system ID corresponding to the record in the **C1_IWS_HIST** table.	No
holdRequestId	Used to indicate the hold request that you want to release.	Yes
holdReleaseReason	Used to specify the reason why you want to release the hold request.	Yes

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Tag Name	Tag Description	Mandatory (Yes or No)
	Note: You must specify a reason which is defined for the **Released** status of the **C1-HoldRequest** business object through the **Status Reason** screen.	
holdComments	Used to specify additional information while releasing the hold request.	No

The following table lists and describes additional tags that are included in the hold release response:

Tag Name	Tag Description
requestProcessStatus	Indicates whether the hold release request is successfully processed or not. The valid values are: • Success • Failure
errormsg	Indicates the error that occurred while releasing the hold request. **Note:** This tag appears when the value in the **requestProcessStatus** tag is set to **Failure**.
holdEndDate	Displays the date till when the hold request is effective. **Note:** The system sets the hold end date to the system date (i.e., when the hold request is released through the inbound web service). This tag appears when the value in the **requestProcessStatus** tag is set to **Success**.
holdRequestStatus	Indicates the status of the hold request. The valid value is: • Release **Note:** This tag appears when the value in the **requestProcessStatus** tag is set to **Success**.

Related Topics

For more information on...	See...
Sample Hold Release Request and Response in the XML Format	Sample Hold Release Request and Response in the XML Format on page 3934

Sample Hold Release Request and Response in the XML Format

Using the below example, you can release a hold request.

Sample Hold Release Request in the XML Format

```
<C1-ReleaseHoldRequest>
    <sourceSystem>SMALL_PRIME</sourceSystem>
    <externalTransactionId>567800876666</externalTransactionId>
    <externalSourceId>656565</externalSourceId>
    <holdRequestId>220419105258</holdRequestId>
    <holdReleaseReason>SUFF</holdReleaseReason>
```

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```
    <holdComments>Sufficient Funds Available</holdComments>
 </C1-ReleaseHoldRequest>
```

Sample Hold Release Response in the XML Format

```
<C1-ReleaseHoldRequest>
    <requestProcessStatus>Success</requestProcessStatus>
    <sourceSystem>SMALL_PRIME</sourceSystem>
    <externalTransactionId>567800876666</externalTransactionId>
    <externalSourceId>656565</externalSourceId>
    <holdRequestId>220419105258</holdRequestId>
    <holdReleaseReason>SUFF</holdReleaseReason>
    <holdComments>Sufficient Funds Available</holdComments>
    <holdEndDate>2025-01-31</holdEndDate>
    <holdRequestStatus>Release</holdRequestStatus>
</C1-ReleaseHoldRequest>
```

Note: We have given the above request sample to illustrate how the tags should be nested while receiving a hold release request from the external system. However, you should not seamlessly use this sample in your environment because the required pre-requisite data may not be available in your environment. In such case, the system will give erroneous results.

Related Topics

For more information on...	See...
Hold Release Request and Response - Tags in XML Format	Hold Release Request and Response - Tags in XML Format on page 3932

Hold Release Request in the JSON Format

The following code snippet illustrates how the attribute/value pairs should be structured while receiving the hold release request in the JSON format:

```
 {
    -"C1-ReleaseHoldRequest": {
        -"sourceSystem": -"",
        -"externalTransactionId": -"",
        -"externalSourceId": -"",
        -"holdRequestId": -"",
        -"holdReleaseReason": -"",
        -"holdComments": -""
    -}
 -}
```

Note: Here, the **C1-ReleaseHoldRequest** attribute represents the operation in the inbound web service which is used to call the **C1-ReleaseHoldRequest** business service. This attribute would change depending on the operation name specified in your REST based inbound web service. For example, if you have set the operation name to **ReleaseHoldRequest**, then you need to specify the **ReleaseHoldRequest** attribute instead of the **C1-ReleaseHoldRequest** attribute in the above request.

Related Topics

For more information on...	See...
Hold Release Response in the JSON Format	Hold Release Response in the JSON Format on page 3936

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For more information on...	See...
Hold Release Request and Response - Attribute/Value Pairs in JSON Format	Hold Release Request and Response - Attribute/Value Pairs in JSON Format on page 3936
Sample Hold Release Request and Response in the JSON Format	Sample Hold Release Request and Response in the JSON Format on page 3938

Hold Release Response in the JSON Format

The following code snippet illustrates how the attribute/value pairs are structured while sending the hold release response in the JSON format:

```
{
   -"C1-ReleaseHoldRequest": {
       -"requestProcessStatus": -"",
       -"sourceSystem": -"",
       -"externalTransactionId": -"",
       -"externalSourceId": -"",
       -"holdRequestId": -"",
       -"holdReleaseReason": -"",
       -"holdComments": -"",
       -"holdEndDate": -"",
       -"holdRequestStatus": -"",
       -"errormsg": -""
   -}
-}
```

Note: Here, the **C1-ReleaseHoldRequest** attribute represents the operation in the inbound web service which is used to call the **C1-ReleaseHoldRequest** business service. This attribute would change depending on the operation name specified in your REST based inbound web service. For example, if you have set the operation name to **ReleaseHoldRequest**, then the **ReleaseHoldRequest** attribute appears instead of the **C1-ReleaseHoldRequest** attribute in the above response.

Related Topics

For more information on...	See...
Hold Release Request in the JSON Format	Hold Release Request in the JSON Format on page 3935
Hold Release Request and Response - Attribute/Value Pairs in JSON Format	Hold Release Request and Response - Attribute/Value Pairs in JSON Format on page 3936
Sample Hold Release Request and Response in the JSON Format	Sample Hold Release Request and Response in the JSON Format on page 3938

Hold Release Request and Response - Attribute/Value Pairs in JSON Format

Note: We recommend you to refer the Hold Release Request in the JSON Format on page 3935 and Hold Release Response in the JSON Format on page 3936 topics in parallel while understanding the below mentioned attributes. This will help you to understand how the attribute/value pairs are structured in the JSON format.

Before calling the **C1-ReleaseHoldRequest** business service through an inbound web service, you need to ensure that the hold release request contains the following attributes:

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Attribute Name	Attribute Description	Mandatory (Yes or No)
C1-ReleaseHoldRequest	Used to indicate that you want to invoke the **C1-ReleaseHoldRequest** business service. **Note:** Here, the **C1-ReleaseHoldRequest** attribute represents the operation in the inbound web service which is used to call the **C1-ReleaseHoldRequest** business service. This attribute would change depending on the operation name specified in your REST based inbound web service. For example, if you have set the operation name to **ReleaseHoldRequest**, then you need to specify the **ReleaseHoldRequest** attribute instead of the **C1-ReleaseHoldRequest** attribute in the hold release request.	Yes
sourceSystem	Used to indicate the external system from where the hold release request is received. **Note:** You must specify an external system which is already defined in the system. If the **Inbound Web Service History** feature is enabled, the system validates whether the specified external system matches the external system that is associated with the outbound message type specified in the **C1-IWSHIST** algorithm. If so, the system stamps the specified external system corresponding to the record in the **C1_IWS_HIST** table. If the external system is not specified in the hold creation request, the system, by default, stamps the external system associated with the outbound message type (specified in the **C1-IWSHIST** algorithm) corresponding to the record in the **C1_IWS_HIST** table. For more information, see the **Inbound Web Service History** section in the *Oracle Revenue Management and Billing Administrative Guide*.	No
externalTransactionId	Used to indicate the transaction in the external system through which the hold release request is received. **Note:** If the **Inbound Web Service History** feature is enabled, the system stores the external transaction ID corresponding to the record in the **C1_IWS_HIST** table.	No
externalSourceId	Used to specify the external source system ID. **Note:** If the **Inbound Web Service History** feature is enabled, the system stores the external source system ID corresponding to the record in the **C1_IWS_HIST** table.	No
holdRequestId	Used to indicate the hold request that you want to release.	Yes
holdReleaseReason	Used to specify the reason why you want to release the hold request.	Yes

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Attribute Name	Attribute Description	Mandatory (Yes or No)
	Note: You must specify a reason which is defined for the **Released** status of the **C1-HoldRequest** business object through the **Status Reason** screen.	
holdComments	Used to specify additional information while releasing the hold request.	No

The following table lists and describes additional attributes that are included in the hold release response:

Attribute Name	Attribute Description
requestProcessStatus	Indicates whether the hold release request is successfully processed or not. The valid values are: • Success • Failure
errormsg	Indicates the error that occurred while releasing the hold request. **Note:** This attribute appears when the value in the **requestProcessStatus** attribute is set to **Failure**.
holdEndDate	Displays the date till when the hold request is effective. **Note:** The system sets the hold end date to the system date (i.e., when the hold request is released through the inbound web service). This attribute appears when the value in the **requestProcessStatus** attribute is set to **Success**.
holdRequestStatus	Indicates the status of the hold request. The valid value is: • Release **Note:** This attribute appears when the value in the **requestProcessStatus** attribute is set to **Success**.

Related Topics

For more information on...	See...
Sample Hold Release Request and Response in the JSON Format	Sample Hold Release Request and Response in the JSON Format on page 3938

Sample Hold Release Request and Response in the JSON Format

Using the below example, you can release a hold request.

Sample Hold Release Request in the JSON Format

```
{
   -"C1-ReleaseHoldRequest": {
       -"sourceSystem": -"SMALL_PRIME",
```

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```
        -"externalTransactionId": -"567800876666",
        -"externalSourceId": -"656565",
        -"holdRequestId": -"220419105258",
        -"holdReleaseReason": -"SUFF",
        -"holdComments": -"Sufficient Funds Available"
    -}
-}
```

Sample Hold Release Response in the JSON Format

```
{
    -"C1-ReleaseHoldRequest": {
        -"requestProcessStatus": -"Success",
        -"sourceSystem": -"SMALL_PRIME",
        -"externalTransactionId": -"567800876666",
        -"externalSourceId": -"656565",
        -"holdRequestId": -"220419105258",
        -"holdReleaseReason": -"SUFF",
        -"holdComments": -"Sufficient Funds Available",
        -"holdEndDate": -"2025-01-31",
        -"holdRequestStatus": -"Release"
    -}
-}
```

Note: We have given the above request sample to illustrate how the attribute/value pairs should be structured while receiving a hold release request from the external system. However, you should not seamlessly use this sample in your environment because the required pre-requisite data may not be available in your environment. In such case, the system will give erroneous results.

Related Topics

For more information on...	See...
Hold Release Request and Response - Attribute/Value Pairs in JSON Format	Hold Release Request and Response - Attribute/Value Pairs in JSON Format on page 3936

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Chapter 47

Hold Direct Debit Instruction

Topics:

- Prerequisites
- Algorithms Used in C1-AutoPayRequest
- Auto Pay Request Status Transition without Approval
- Auto Pay Request Status Transition with Approval
- Auto Pay Request Type
- Auto Pay Request (Used for Searching)
- Auto Pay Request (Used for Viewing)

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

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

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

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

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

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

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

- Updates the **ELIG_EXTRACT_SW** and **APAY_CRE_DT** columns corresponding to the automatic payment records in the **CI_BILL_ACH** table
- Changes the status of the automatic payment request to **Processed**

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

- Updates the **ELIG_EXTRACT_SW** and **APAY_CRE_DT** columns corresponding to the automatic payment records in the **CI_BILL_ACH** table
- Changes the status of the automatic payment request to **Processed**

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

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

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

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

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

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Prerequisites

To setup the auto pay request feature, you need to do the following:

- Auto pay request type business object defined in the application
- Auto pay request types defined in the system.
- Approval To Do types and To Do roles defined in the application
- Submitter To Do types and To Do roles defined in the application
- Characteristic types defined in the application

Algorithms Used in C1-AutoPayRequest

The following table lists the algorithm which is attached to the **C1-AutoPayRequest** business object:

System Event	Algorithm	Algorithm Type	Description
Information	C1-APAYRQINF	C1-APAYRQINF	Refer to C1-APAYRQINF on page 3943

The following table lists the algorithms which are used in the lifecycle of the **C1-AutoPayRequest** business object:

Status	System Event	Algorithm	Algorithm Type	Description
Draft	Exit	F1-TODOCOMPL	F1-TODOCOMPL	Refer to F1-TODOCOMPL on page 1469
Submitted	Enter	C1-APAYSUB	C1-APAYSUB	Refer to C1-APAYSUB on page 3944
Approval In Progress	Enter	C1-APAYAPP	C1-APAYAPP	Refer to C1-APAYAPP on page 3944
	Exit	F1-TODOCOMPL	F1-TODOCOMPL	Refer to F1-TODOCOMPL on page 1469
Update Auto Pay Record	Enter	C1-UPDAPAY	C1-UPDAPAY	Refer to C1-UPDAPAY on page 3944
Approved	Enter	C1-APAYAPRVD	C1-APAYAPRVD	Refer to C1-APAYAPRVD on page 3945
Return to Submitter	Enter	C1-APAYRESUB	C1-APAYRESUB	Refer to C1-APAYRESUB on page 3945
Processed	-	-	-	-
Rejected	-	-	-	-

C1-APAYRQINF

The **C1-APAYRQINF** algorithm generates the auto pay request information string and is plugged in at **System Event**: **Information** of business object: **C1-AutoPayRequest**.

It concatenates the following fields:

- Auto Pay Request Type Description

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- Auto Pay Request Status Description
- Auto Pay Request ID

F1-TODOCOMPL

This algorithm completes the To Do entries that are linked to an object when the object exits the given status. It finds and completes all open To Do entries where the business object's primary key is defined as a drill key. However, if the **Exclude To Do Entries From Auto Completion** (**F1-EXLTD**) characteristic is set to **Y** for a To Do type, the system does not automatically complete the respective To Do entry.

This algorithm contains the following parameter:

- **'Do Not Complete To Do Type' Char Type** – Used to specify the characteristic type that indicates whether the To Do entries should be automatically completed or not.

> **Note:** The **F1-EXLTD** characteristic type is shipped with the product. You can either use the **F1-EXLTD** characteristic type or a custom characteristic type, if required. Note that you must specify a predefined characteristic type where the characteristic entity is set to **To Do Type** and the predefined values are set to **Y** or **N**.

C1-APAYSUB

The **C1-APAYSUB** algorithm will be plugged at the **"Enter" System event** of the business object (**C1-AutoPayRequest**) life cycle status: **SUBMITTED**.

This algorithm checks the following:

1. Whether the approval is required for the auto pay request based on the configuration in auto pay request type (**IS_APPR_REQ** = **Y**).
   a. If the approval is required for the auto pay request, the status of the auto pay request is changed to **Approval In Progress**.
   b. If the approval is not required for the auto pay request, the status of the auto pay request is changed to **UPDATEAPAY**.
2. At least one auto pay record is selected in the auto pay request.
3. Updated scheduled extraction date cannot be less than system date.
4. **Auto Pay Request** cannot be created for any auto pay record if the same auto pay record is selected in another request which is in the **Approval In Progress** status.

C1-APAYAPP

The **C1-APAYAPP** algorithm creates the following:

1. A To Do using the To Do type specified in the approval profile which is attached to the **Auto Pay Request Type**. The To Do is sent to the appropriate users in the approval hierarchy depending on whether hierarchical approval is required or not.
2. A log entry is added when a To Do is created using the To Do type. It will create To Do Entry when **Auto Pay Request** enters in the **Approval in Progress** status from **Submit** status.

C1-UPDAPAY

The **C1-UPDAPAY** algorithm will be plugged in at **"Enter" System event** of the business object (**C1-AutoPayRequest**) life cycle status: **UPDATEAPAY**.

1. The **Extract Eligible Switch** and **Auto Pay Creation Date** are updated in the **CI_BILL_ACH** table with the latest values present in **Auto Pay Request Details** table. The auto pay request status is then changed to **PROCESSED**.

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2. If the bill which is present in the **Auto Pay Request** is cancelled then the latest details of **Extract Eligible Switch** and **Auto Pay Creation Date** are not updated in the **CI_BILL_ACH** table and the auto pay request status is changed to **PROCESSED**.

C1-APAYAPRVD

The **C1-APAYAPRVD** algorithm is the **Enter** status algorithm. This algorithm is invoked when you approve an **Auto Pay Request**. It confirms whether the approval flag is true and the status of the **Auto Pay request** is **APPROVED** to transit it to the next level.

C1-APAYRESUB

The **C1-APAYRESUB** algorithm is invoked on the **Re-Submit** button. It moves the status of the **Auto Pay Request** to **Draft**.

A To Do is generated for the user as submitter whose To Do type and To Do role are fetched from the **Auto Pay Request Type**. This algorithm creates the To Do entry when the **Auto Pay Request** enters into the **Return to Submitter** status from the **Approval In Progress** status.

Auto Pay Request Status Transition without Approval

The following figure graphically indicates how an auto pay request moves from one status to another when the approval process is not configured in the auto pay request type:

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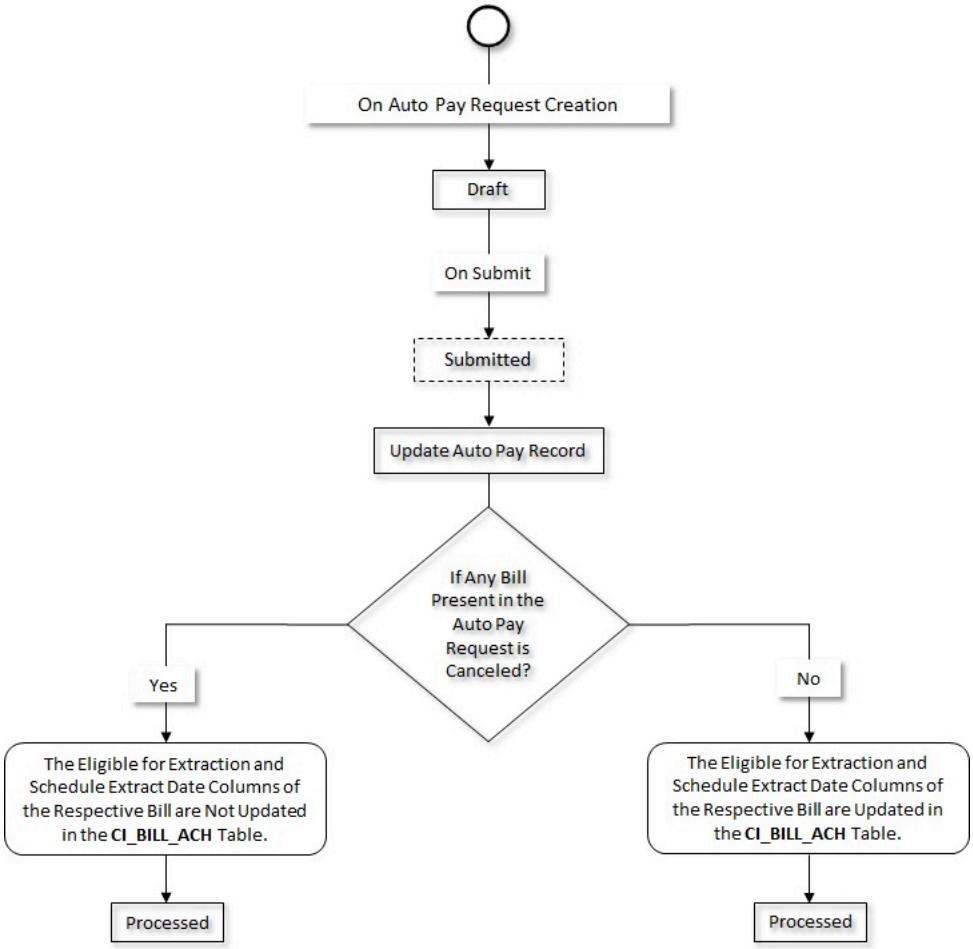

Auto Pay Request Status Transition with Approval

The following figure graphically indicates how an auto pay request moves from one status to another when the approval process is configured in the auto pay request type:

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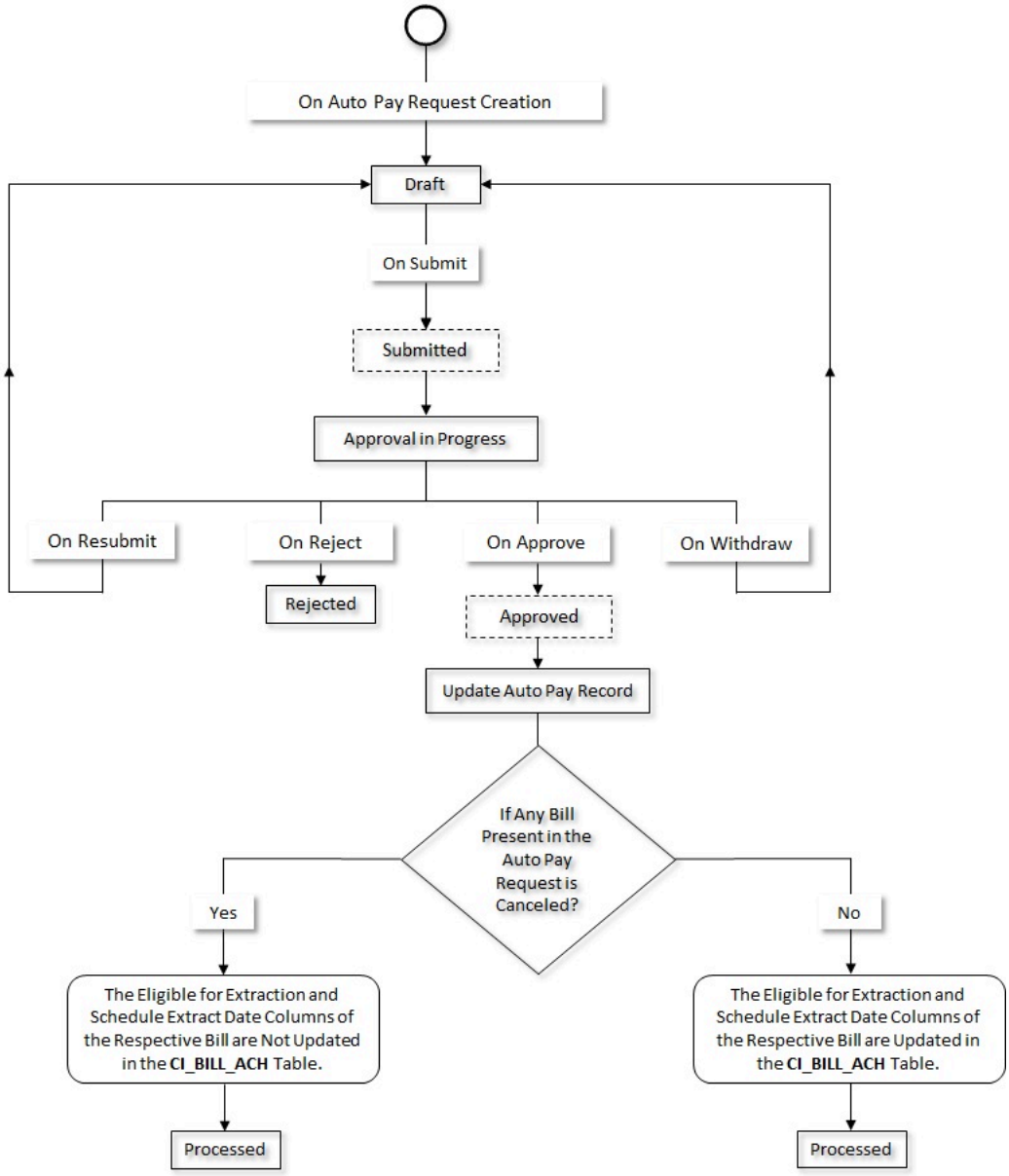

Auto Pay Request Type

The **Auto Pay Request Type** screen allows you to define, edit, copy, and delete an auto pay request type. It also allows you to view the details of an auto pay request type. It contains the following zones:

- Auto Pay Request Type List on page 3947
- Auto Pay Request Type on page 3948

Auto Pay Request Type List

The **Auto Pay Request Type List** zone lists the auto pay request types that are already defined in the system. It contains the following columns:

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Column Name	Column Description
Auto Pay Request Type	Displays the auto pay request type.
Description	Displays the description of the auto pay request type.
Edit	On clicking the **Edit** (✎) icon, the **Auto Pay Request Type** screen appears where you can edit the details of the auto pay request type.
Duplicate	On clicking the **Duplicate** (⧉) icon, the **Auto Pay Request Type** screen appears where you can define an auto pay request type using an existing auto pay request type.
Delete	On clicking the **Delete** (🗑) icon, you can delete the auto pay request type.
	Note: You can delete an auto pay request type only when an auto pay request is not yet created using the auto pay request type.

On clicking the **Broadcast** (📡) icon corresponding to an auto pay request type, the **Auto Pay Request Type** zone appears with the details of the respective auto pay request type.

Related Topics

For more information on...	See...
Auto Pay Request Type screen	Auto Pay Request Type on page 3947
How to edit an auto pay request type	Editing an Auto Pay Request Type on page 3954
How to copy an auto pay request type	Copying an Auto Pay Request Type on page 3956
How to delete an auto pay request type	Deleting an Auto Pay Request Type on page 3958
How to view the details of the auto pay request type	Viewing the Auto Pay Request Type Details on page 3959
Auto Pay Request Type zone	Auto Pay Request Type on page 3948

Auto Pay Request Type

The **Auto Pay Request Type** zone displays the details of the auto pay request type. It contains the following sections:

- **Main** - Displays basic information about the auto pay request type. It contains the following fields:

Field Name	Field Description
Auto Pay Request Type	Displays the auto pay request type.
Description	Displays the description of the auto pay request type.
Related Transaction BO	Indicates the business object using which the auto pay transaction is performed. In addition, a context menu appears corresponding to this field which helps in navigating to other screens in the application.
	Note: It has a link. On clicking the link, the **Business Object** screen appears where you can view the details of the respective business object.
Detailed Description	Displays additional information about the auto pay request type.
Auto Pay Request Action	Indicates the action which is performed on the auto pay request using the auto pay request type.

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Field Name	Field Description
Status	Indicates the current status of the auto pay request type. The valid values are: • Active • Inactive
Approval Required	Indicates whether approval is required for the auto pay request which is created using the auto pay request type.
Approval To Do Type	Indicates that the To Do entry of the specified To Do Type is created when you submit the auto pay request for an approval. **Note:** It has a link. On clicking the link, the **To Do Type** screen appears where you can view the details of the respective To Do type. This field appears only when the **Approval Required** option is selected.
Approval To Do Role	Indicates that the users which belong to the specified To Do role can only approve the auto pay request when it is submitted for an approval. **Note:** It has a link. On clicking the link, the **To Do Role** screen appears where you can view the details of the respective To Do role. This field appears only when the **Approval Required** option is selected.
Submitter To Do Type	Indicates that the To Do entry of the specified To Do task is created when an auto pay request is resubmitted by an approver. **Note:** It has a link. On clicking the link, the **To Do Type** screen appears where you can view the details of the respective To Do type.
Submitter To Do Role	Indicates that the approvers which belong to the specified To Do role can only resubmit the auto pay request. **Note:** It has a link. On clicking the link, the **To Do Role** screen appears where you can view the details of the respective To Do role.

- **Characteristic** - Lists the characteristics defined for the auto pay request type. It contains the following columns:

Column Name	Column Description
Characteristic Type	Indicates the characteristic type.
Characteristic Value	Displays the value of the characteristic type.

- **Record Actions** - The **Record Actions** section contains the following buttons:

Button Name	Button Description
Edit	Used to edit the details of the auto pay request type.
Delete	Used to delete the auto pay request type. **Note:** You can delete an auto pay request type only when an auto pay request is not yet created using the auto pay request type.

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Button Name	Button Description
Duplicate	Used to create a new auto pay request type using an existing auto pay request type.

- **Record Information** - The **Record Information** section contains the following fields:

Field Name	Field Description
Business Object	Indicates the business object using which the auto pay request type is created in the system. In addition, a context menu appears corresponding to this field which helps in navigating to other screens in the application.
	Note: It has a link. On clicking the link, the **Business Object** screen appears where you can view the details of the respective business object.

By default, the **Auto Pay Request Type** zone does not appear in the **Auto Pay Request Type** screen. It appears only when you click the **Broadcast** (📡) icon corresponding to an auto pay request type in the **Auto Pay Request Type List** zone.

Related Topics

For more information on...	See...
How to define an auto pay request type	Defining an Auto Pay Request Type on page 3950
How to edit an auto pay request type	Editing an Auto Pay Request Type on page 3954
How to copy an auto pay request type	Copying an Auto Pay Request Type on page 3956
How to delete an auto pay request type	Deleting an Auto Pay Request Type on page 3958
How to view the details of an auto pay request type	Viewing the Auto Pay Request Type Details on page 3959
Auto Pay Request Type screen	Auto Pay Request Type on page 3947
Auto Pay Request Type List zone	Auto Pay Request Type List on page 3947

Defining an Auto Pay Request Type

Prerequisites

To define an auto pay request type, you should have:

- Auto pay request type business objects defined in the application
- Approval To Do Types and To Do roles defined in the application
- Submitter To Do Types and To Do roles defined in the application

Procedure

To define an auto pay request type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **A** and then click **Auto Pay Request Type**.
   A sub-menu appears.
3. Click the **Add** option from the **Auto Pay Request Type** sub-menu.

Tip: Alternatively, you can access the **Auto Pay Request Type** screen by clicking the **Add** button in the **Page Title** area of the **Auto Pay Request Type** screen.

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Note: The **Select Business Object** screen appears when there are multiple auto pay request type business objects defined in the application. If there is only one auto pay request type business object defined in the application, the **Auto Pay Request Type** screen appears.

4. Select the required auto pay request type business object from the respective field.
5. Click **OK**.

The **Auto Pay Request Type** screen appears. It contains the following sections:

- **Main** - Used to specify basic details about the auto pay request type.
- **Characteristics** - Used to define the characteristics for the auto pay request type.

The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Auto Pay Request Type	Used to specify the auto pay request type.	Yes
Business Object	Indicates the business object using which the auto pay request type is defined in the system.	Not applicable
Description	Used to specify the description for the auto pay request type.	Yes
Related Transaction BO	Used to indicate the business object using which the auto pay transaction is performed. The valid value is: • Auto Pay Request	Yes
Detailed Description	Used to specify additional information about the auto pay request type.	No
Auto Pay Request Action	Indicates the action which is performed on the auto pay request using the auto pay request type. The valid value is: • Update **Note:** By default, the **Update** option is selected and cannot be edited.	Not applicable
Status	Used to indicate the current status of the auto pay request type. The valid values are: • Active • Inactive **Note:** You cannot change the status of an auto pay request type to**Inactive** when an auto pay request created using the auto pay request type is in the **Draft** or **Rejected** status.	Yes
Approval Required	Used to indicate whether approval is required for the auto pay request which is created using the auto pay request type.	No
Approval To Do Type	Used to specify the To Do entry of the specified To Do Type that is created when you submit the auto pay request for an approval.	Yes (Conditional)

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The **Search** (🔍) icon appears corresponding to the **Approval To Do Type** field. On clicking the **Search** icon, the **To Do Type Search** window appears. On specifying the To Do type, the description of the To Do type appears corresponding to the **Approval To Do Type** field. This field appears only when the **Approval Required** check box is selected.	**Note:** This field is required while approving an auto pay request which is created using the auto pay request type.
Approval To Do Role	Used to indicate the users which belong to the specified To Do role who can approve the auto pay request when it is submitted for an approval. **Note:** The list includes only those To Do roles which are associated with the specified **Approval To Do Type**. This field appears only when the **Approval Required** check box is selected.	Yes (Conditional) **Note:** This field is required while approving an auto pay request which is created using the auto pay request type.
Submitter To Do Type	Used to indicate the To Do entry of the specified To Do Type that is created when an auto pay request is resubmitted by an approver. **Note:** The **Search** (🔍) icon appears corresponding to the **Submitter To Do Type** field. On clicking the **Search** icon, the **To Do Type Search** window appears. On specifying the To Do type, the description of the To Do type appears corresponding to the **Submitter To Do Type** field. This field appears only when the **Approval Required** check box is selected.	Yes (Conditional) **Note:** This field is required while resubmitting an auto pay request which is created using the auto pay request type.
Submitter To Do Role	Used to indicate the users which belong to the specified To Do role who can resubmit the auto pay request when it is submitted for an approval. **Note:** The list includes only those To Do roles which are associated with the specified **Submitter To Do Type**. This field appears only when the **Approval Required** check box is selected.	Yes (Conditional) **Note:** This field is required while resubmitting an auto pay request which is created using the auto pay request type.

6. Enter the required details in the **Main** section.

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7. Define a list of characteristics for the auto pay request type, if required.
8. Click **Save**.
   The auto pay request type is defined.

Related Topics

For more information on...	See...
Auto Pay Request Type screen	Auto Pay Request Type on page 3947
How to define a characteristic for an auto pay request type	Defining a Characteristic for an Auto Pay Request Type on page 3953

Defining a Characteristic for an Auto Pay Request Type

Prerequisites

To define a characteristic for an auto pay request type, you should have:

- Characteristic types defined in the application (where the characteristic entity is set to **Auto Pay Request Type**)

Procedure

To define a characteristic for an auto pay request type:

1. Ensure that the **Characteristics** section is expanded when you are defining, editing, or copying an auto pay request type.

   The **Characteristics** section contains the following fields in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Characteristic Type	Used to indicate the characteristic type. **Note:** The list includes only those characteristic types where the characteristic entity is set to **Auto Pay Request Type**.	Yes (Conditional) **Note:** This field is required while defining a characteristic for the auto pay request type.
Characteristic Value	Used to specify the value for the characteristic type. **Note:** If you select a predefined characteristic type, the **Search** (🔍) icon appears corresponding to the **Characteristic Value** field. On clicking the **Search** icon, you can search for the respective characteristic value. On specifying the value for a predefined characteristic type, the description of the characteristic value appears corresponding to the **Characteristic Value** field.	Yes (Conditional) **Note:** This field is required while defining a characteristic for the auto pay request type.

2. Enter the required details in the **Characteristics** section.
3. If you want to define more than one characteristic for the auto pay request type, click the **Add** (+) icon and then *r*epeat step *2*.

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Note: However, if you want to remove a characteristic from the auto pay request type, click the **Delete** (🗑) icon corresponding to the characteristic.

Related Topics

For more information on...	See...
How to define an auto pay request type	Defining an Auto Pay Request Type on page 3950
How to edit an auto pay request type	Editing an Auto Pay Request Type on page 3954
How to copy an auto pay request type	Copying an Auto Pay Request Type on page 3956

Editing an Auto Pay Request Type

Prerequisites

To edit an auto pay request type, you should have:

- Auto pay request type that you want to edit defined in the application

Procedure

To edit an auto pay request type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **A** and then click **Auto Pay Request Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Auto Pay Request Type** sub-menu.
   The **Auto Pay Request Type** screen appears.
4. In the **Auto Pay Request Type List** zone, click the **Edit** (✎) icon in the **Edit** column corresponding to the auto pay request type whose details you want to edit.

   The **Auto Pay Request Type** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details about the auto pay request type.
   - **Characteristics** - Used to define the characteristics for the auto pay request type.

   The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Auto Pay Request Type	Displays the auto pay request type.	Not applicable
Business Object	Indicates the business object using which the auto pay request type is defined in the system.	Not applicable
Description	Used to specify the description for the auto pay request type.	Yes
Related Transaction BO	Used to indicate the business object using which the auto pay transaction is performed.	Yes
Detailed Description	Used to specify additional information about the auto pay request type.	No
Auto Pay Request Action	Displays the action which is performed on the auto pay request using the auto pay request type.	Not applicable

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Field Name	Field Description	Mandatory (Yes or No)
Status	Used to indicate the status of the auto pay request type. The valid values are: • Active • Inactive	Yes
Approval Required	Used to indicate whether approval is required for the auto pay request which is created using the auto pay request type.	No
Approval To Do Type	Used to indicate the To Do task which is performed by the approver while approving the auto pay request. **Note:** The **Search** (🔍) icon appears corresponding to the **Approval To Do Type** field. On clicking the **Search** (🔍) icon, the **To Do Type Search** window appears. On specifying the To Do type, the description of the To Do type appears corresponding to the **Approval To Do Type** field. This field appears when the **Approval Required** option is selected.	Yes
Approval To Do Role	Used to indicate the users with the specified To Do role who can approve the auto pay request. **Note:** The list includes only those To Do roles which are associated with the approval To Do type. This field appears when the **Approval Required** option is selected.	Yes
Submitter To Do Type	Used to indicate the To Do task created when an auto pay request is submitted by an approver. **Note:** The **Search** (🔍) icon appears corresponding to the **Submitter To Do Type** field. On clicking the **Search** icon, the **To Do Type Search** window appears. On specifying the To Do type, the description of the To Do type appears corresponding to the **Submitter To Do Type** field.	Yes
Submitter To Do Role	Used to indicate the users with the specified To Do role who can submit the auto pay request for approval.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The list includes only those To Do roles which are associated with the submitter To Do type.	

Tip: Alternatively, you can access this screen by clicking the **Edit** button in the **Auto Pay Request Type** zone.

5. Modify the required details in the **Main** section.
6. Define, edit, or remove characteristics of the auto pay request type, if required.
7. Click **Save**.
   The changes made to the auto pay request type are saved.

Related Topics

For more information on...	See...
Auto Pay Request Type screen	Auto Pay Request Type on page 3947
Auto Pay Request Type List zone	Auto Pay Request Type List on page 3947
Auto Pay Request Type zone	Auto Pay Request Type on page 3948
How to define a characteristic for an auto pay request type	Defining a Characteristic for an Auto Pay Request Type on page 3953

Copying an Auto Pay Request Type

Instead of creating an auto pay request type from scratch, you can create a new auto pay request type using an existing auto pay request type. This is possible through copying an auto pay request type. On copying an auto pay request type, the details including the characteristics are copied to the new auto pay request type. You can then edit the details, if required.

Prerequisites

To copy an auto pay request type, you should have:

- Auto pay request type (whose copy you want to create) defined in the application
- Auto pay request business objects defined in the application

Procedure

To copy an auto pay request type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **A** and then click **Auto Pay Request Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Auto Pay Request Type** sub-menu.
   The **Auto Pay Request Type** screen appears.
4. In the **Auto Pay Request Type List** zone, click the **Duplicate** (⎘) icon in the **Duplicate** column *c*orresponding to the auto pay request type whose copy you want to create.

   The **Auto Pay Request Type** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details about the auto pay request type.
   - **Characteristics** - Used to define the characteristics for the auto pay request type.

   The **Main** section contains the following fields:

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Field Name	Field Description	Mandatory (Yes or No)
Auto Pay Request Type	Used to specify the auto pay request type.	Yes
Business Object	Indicates the business object using which the auto pay request type is defined in the system.	Not applicable
Description	Used to specify the description for the auto pay request type.	Yes
Related Transaction BO	Used to indicate the business object using which the auto pay transaction is performed.	Yes
Detailed Description	Used to specify additional information about the auto pay request type.	No
Status	Used to indicate the status of the auto pay request type. The valid values are: • Active • Inactive	Yes
Approval Required	Used to indicate whether approval is required for the auto pay request which is created using the auto pay request type.	No
Approval To Do Type	Used to indicate the To Do task which is performed by the approver while approving the auto pay request. **Note:** The **Search** (🔍) icon appears corresponding to the **Approval To Do Type** field. On clicking the **Search** icon, the **To Do Type Search** window appears. On specifying the To Do type, the description of the To Do type appears corresponding to the **Approval To Do Type** field. This field appears when the **Approval Required** option is selected.	Yes
Approval To Do Role	Used to indicate the users with the specified To Do role who can approve the auto pay request. **Note:** The list includes only those To Do roles which are associated with the approval To Do type. This field appears when the **Approval Required** option is selected.	Yes
Submitter To Do Type	Used to indicate the To Do task created when an auto pay request is submitted by an approver.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The **Search** (🔍) icon appears corresponding to the **Submitter To Do Type** field. On clicking the **Search** icon, the **To Do Type Search** window appears. On specifying the To Do type, the description of the To Do type appears corresponding to the **Submitter To Do Type** field.	
Submitter To Do Role	Used to indicate the users with the specified To Do role who can submit the auto pay request for approval. **Note:** The list includes only those To Do roles which are associated with the submitter To Do type.	Yes

Tip: Alternatively, you can copy an auto pay request type by clicking the **Duplicate** button in the **Auto Pay Request Type** zone.

5. Enter the required details in the **Main** section.
6. Define, edit, or remove characteristics of the auto pay request type, if required.
7. Click **Save**.
   The new auto pay request type is defined.

Related Topics

For more information on...	See...
Auto Pay Request Type screen	Auto Pay Request Type on page 3947
Auto Pay Request Type List zone	Auto Pay Request Type List on page 3947
Auto Pay Request Type zone	Auto Pay Request Type on page 3948
How to define a characteristic for an auto pay request type	Defining a Characteristic for an Auto Pay Request Type on page 3953

Deleting an Auto Pay Request Type

Procedure

To delete an auto pay request type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **A** and then click **Auto Pay Request Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Auto Pay Request Type** sub-menu.
   The **Auto Pay Request Type** screen appears.
4. In the **Auto Pay Request Type List** zone, click the **Delete** (🗑) icon in the **Delete** column corresponding to the *a*uto pay request type that you want to delete.

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A message appears confirming whether you want to delete the auto pay request type.

Tip: Alternatively, you can delete an auto pay request type by clicking the **Delete** button in the **Auto Pay Request Type** zone.

5. Click **OK**.
   The auto pay request type is deleted.

Related Topics

For more information on...	See...
Auto Pay Request Type screen	Auto Pay Request Type on page 3947
Auto Pay Request Type List zone	Auto Pay Request Type List on page 3947
Auto Pay Request Type zone	Auto Pay Request Type on page 3948

Viewing the Auto Pay Request Type Details

Procedure

To view the details of an auto pay request type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **A** and then click **Auto Type Request Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Auto Type Request Type** sub-menu.
   The **Auto Pay Request Type** screen appears.
4. In the **Auto Pay Request Type List** zone, click the **Broadcast** (📡) icon corresponding to the auto pay request type whose details you want to view.
   The **Auto Pay Request Type** zone appears.
5. View the details of the auto pay request type in the **Auto Pay Request Type** zone.

Related Topics

For more information on...	See...
Auto Pay Request Type screen	Auto Pay Request Type on page 3947
Auto Pay Request Type List zone	Auto Pay Request Type List on page 3947
Auto Pay Request Type zone	Auto Pay Request Type on page 3948

Auto Pay Request (Used for Searching)

The **Auto Pay Request** screen allows you to search for an auto pay request using various search criteria. It contains the following zone:

- Search Auto Pay Request on page 3960

Through this screen, you can navigate to the following screen:

- Auto Pay Request (Used for Viewing) on page 3965

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Search Auto Pay Request

The **Search Auto Pay Request** zone allows you to search for an auto pay request using various search criteria. It contains the following two sections:

- **Search Criteria** - The **Search Criteria** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Search By	Used to indicate whether you want to search for an auto pay request using the auto pay request or person, account or bill details. The valid values are: • Request Details • Person, Account or Bill Details **Note:** By default, the **Request Details** option is selected.	Yes
Auto Pay Request Type	Used to search auto pay requests which are created using a particular auto pay request type. **Note:** This field appears when the **Request Details** option is selected from the **Search By** list.	No
Status	Used to search auto pay requests with a particular status. The valid values are: • Approved • Approval in Progress • Draft • Processed • Rejected • Update Auto Pay Record **Note:** This field appears when the **Request Details** option is selected from the **Search By** list.	Yes
Created From	Used to search auto pay requests which are created from a particular date onwards. **Note:** This field appears when the **Request Details** option is selected from the **Search By** list.	No
User ID	Used to search auto pay requests which are created by a particular user. **Note:** This field appears when the **Request Details** option is selected from the **Search By** list.	No

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Field Name	Field Description	Mandatory (Yes or No)
Created Until	Used to search auto pay requests which are created till a particular date. **Note:** This field appears when the **Request Details** option is selected from the **Search By** list.	No
Auto Pay Request ID	Used to search a particular auto pay request. **Note:** This field appears when the **Request Details** option is selected from the **Search By** list.	No
Person ID	Used to search auto pay requests which include bills of a particular person. **Note:** The **Search** (🔍) icon appears corresponding to the **Person ID** field. On clicking the **Search** icon, the **Person Search** window appears. This field appears when the **Person, Account or Bill Details** option is selected from the **Search By** list.	No
Account ID	Used to search auto pay requests which include bills of a particular account. **Note:** The **Search** (🔍) icon appears corresponding to the **Account ID** field. On clicking the **Search** icon, the **Account Search** window appears. This field appears when the **Person, Account or Bill Details** option is selected from the **Search By** list.	No
Bill ID	Used to search auto pay requests which include a particular bill. **Note:** The **Search** (🔍) icon appears corresponding to the **Bill ID** field. On clicking the **Search** icon, the **Bill Search** window appears. This field appears when the **Person, Account or Bill Details** option is selected from the **Search By** list.	No
From Bill Date	Used to search auto pay requests which include bills created from a particular date onwards.	No

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Field Name	Field Description	Mandatory (Yes or No)
	Note: This field appears when the **Person, Account or Bill Details** option is selected from the **Search By** list.	
Auto Pay ID	Used to search auto pay requests which include bills of a particular auto pay ID. **Note:** This field appears when the **Person, Account or Bill Details** option is selected from the **Search By** list.	No
To Bill Date	Used to search auto pay requests which include bills created till a particular date. **Note:** This field appears when the **Person, Account or Bill Details** option is selected from the **Search By** list.	No

Note: You must specify at least one search criterion while searching for an auto pay request.

- **Search Results** - On clicking the **Search** button, the search results appear based on the specified search criteria. The **Search Results** section contains the following columns:

Column Name	Column Description
Creation Date Time	Displays the date and time when the auto pay request is created.
Auto Pay Request Information	Displays the concatenated string of information about the auto pay request. **Note:** It has a link. On clicking the link, the **Auto Pay Request** screen appears where you can view the details of the respective auto pay request.
Status	Indicates the status of the auto pay request. The valid values are: • Approved • Approval in Progress • Draft • Processed • Rejected • Update Auto Pay Record
Auto Pay Request Type	Indicates the type of the auto pay request.
Created By	Indicates the concatenated string of the user information who has created the auto pay request.

Note: Pagination is used to display limited number of records in the **Search Results** section. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

Related Topics

For more information on...	See...
How to search for an auto pay request	Searching for an Auto Pay Request on page 3963

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For more information on...	See...
How to view the details of an auto pay request	Viewing the Auto Pay Request Details on page 3964
How to create an auto pay request	Creating an Auto Pay Request on page 3963

Searching for an Auto Pay Request

Prerequisites

To search for an auto pay request, you should have:

- Auto pay request types defined in the application

Procedure

To search for an auto pay request:

1. Click the **Menu** link in the **Application** toolbar.
   A list appears.
2. From the **Main** menu, select **Accounting and Receivable** and then click **Auto Pay Request**.
   A sub-menu appears.
3. Click the **Search** option from the **Auto Pay Request** sub-menu.
   The **Auto Pay Request** screen appears.
4. Enter the search criteria in the **Search Auto Pay Request** zone.

   Note: ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.
5. Click **Search**.
   A list of auto pay requests that meet the search criteria appears in the **Search Results** section.

Related Topics

For more information on...	See...
Auto Pay Request screen	Auto Pay Request (Used for Searching) on page 3959
Search Auto Pay Request zone	Search Auto Pay Request on page 3960

Creating an Auto Pay Request

Prerequisites

To create an auto pay request, you should have:

- Auto pay request types defined in the application

Procedure

To create an auto pay request:

1. Click the **Menu** link in the **Application** toolbar.
   A list appears.
2. From the **Main** menu, select **Accounting and Receivable** and then click **Auto Pay Request**.
   A sub-menu appears.

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3. Click the **Add** option from the **Auto Pay Request** sub-menu.

   The **Add Auto Pay Request** screen appears. It contains the following field:

Field Name	Field Description	Mandatory (Yes or No)
Auto Pay Request Type	Used to indicate the auto pay request type using which you want to create the auto pay request for the bills.	Yes

> **Tip:** Alternatively, you can access this screen by clicking the **Add** button in the **Page Title** area of the **Auto Pay Request** screen.

4. Select the required auto pay request type from the **Add Auto Pay Request** screen.
5. Click **OK**.

   The **Auto Pay Request** screen appears with the auto pay request details in the **Draft** status.
6. Add the auto pay line items of the bills by searching for the bills in the **Search Bills** zone of the **Auto Pay Request - Bills** tab.
7. Define characteristics for the auto pay request by editing the auto pay request, if required.
8. Add logs for the auto pay request in the **Auto Pay Request Log** zone of the **Auto Pay Request - Log** tab, if required.

Related Topics

For more information on...	See...
Auto Pay Request screen	Auto Pay Request (Used for Searching) on page 3959
How to add an auto pay line item in an auto pay request	Adding an Auto Pay Line Item in an Auto Pay Request on page 3976
How to define a characteristic for an auto pay request	Defining a Characteristic for an Auto Pay Request on page 3971
How to add a log entry for an auto pay request	Adding a Log Entry for an Auto Pay Request on page 3979

Viewing the Auto Pay Request Details

Procedure

To view the details of an auto pay request:

1. Search for the auto pay request in the **Auto Pay Request** screen.
2. In the **Search Results** section, click the link in the **Auto Pay Request Information** column corresponding to the *a*uto pay request whose details you want to view.
   The **Auto Pay Request** screen appears.
3. Ensure that the **Main** tab is selected.
4. View the details of the auto pay request in the **Auto Pay Request** and **Auto Pay Details**zone.

Related Topics

For more information on...	See...
How to search for an auto pay request	Searching for an Auto Pay Request on page 3963
Auto Pay Request screen	Auto Pay Request (Used for Searching) on page 3959
Search Auto Pay Request zone	Search Auto Pay Request on page 3960

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Auto Pay Request (Used for Viewing)

The **Auto Pay Request** screen allows you to do the following:

- View the details of the auto pay request
- View the debit and credit bills which are added to the auto pay request
- Edit the auto pay request details
- Delete the auto pay request
- Submit the auto pay request for an approval
- Search the bills
- Add bills in the auto pay request
- View the log of the auto pay request
- Add a log entry for the auto request

It consists of the following tabs:

- Auto Pay Request - Main on page 3965
- Auto Pay Request - Bills on page 3968
- Auto Pay Request - Log on page 3970

Auto Pay Request - Main

The **Main** tab displays information about the auto pay request. It contains the following zones:

- Auto Pay Request on page 3965
- Auto Pay Details on page 3967

Auto Pay Request

The **Auto Pay Request** zone displays the details of the auto pay request. It contains the following sections:

- **Main** - Displays basic information about the auto pay request. It contains the following fields:

Field Name	Field Description
Auto Pay Request Information	Displays information about the auto pay request.
Auto Pay Request Type	Indicates the auto pay request type using which the auto pay request is created. **Note:** It has a link. On clicking the link, the **Auto Pay Request Type** screen appears where you can view the details of the respective auto request type.
Status	Indicates the status of the auto pay request. The valid values are: • Approved • Approval in Progress • Draft • Processed • Rejected • Update Auto Pay Record
Status Reason	Indicates the reason why the auto pay request is rejected.

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Field Name	Field Description
	Note: It has a link. On clicking the link, the **Status Reason** screen appears where you can view the details of the respective status reason. This field appears when the auto pay request is in the **Rejected** status.

- **Characteristics** - Lists the characteristics defined for the auto pay request. It contains the following columns:

Column Name	Column Description
Effective Date	Displays the date from when the characteristic is effective for the auto pay request.
Characteristic Type	Indicates the characteristic type.
Characteristic Value	Displays the value of the characteristic type.

- **Record Actions** - This section contains the following buttons:

Button Name	Button Description
Edit	Used to edit the details of the auto pay request. **Note:** The **Edit** button appears when the auto pay request is in the **Draft** status.
Delete	Used to delete the auto pay request. **Note:** The **Delete** button appears when the auto request is in the **Draft** status.
Submit	Used to submit the auto pay request. **Note:** The **Submit** button appears when the auto request is in the **Draft** status.
Approve	Used to approve the auto pay request. **Note:** The **Approve** button appears when: • The auto pay request is in the **Approval In Progress** status. • A user with the approval To Do role is reviewing the auto pay request.
Reject	Used to reject the auto pay request. **Note:** The **Reject** button appears when: • The auto pay request is in the **Approval In Progress** status. • A user with the approval To Do role is reviewing the auto pay request.

- **Record Information** - This section contains the following fields:

Field Name	Field Description
Business Object	Indicates the business object using which the auto pay request is created. In addition, a context menu appears corresponding to this field which helps in navigating to other screens in the application.

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Field Name	Field Description
	Note: It has a link. On clicking the link, the **Business Object** screen appears where you can view the details of the respective business object.
Status Date/Time	Displays the date and time when the auto pay request status is updated
Create Date/Time	Displays the date and time when the auto pay request is created.

Related Topics

For more information on...	See...
How to delete an auto pay request	Deleting an Auto Pay Request on page 3973
How to submit an auto pay request	Submitting an Auto Pay Request on page 3973
How to approve an auto pay request	Approving an Auto Pay Request on page 3974
How to reject an auto pay request	Rejecting an Auto Pay Request on page 3974

Auto Pay Details

The **Auto Pay Details** zone displays the details of the auto pay request. It contains the following columns:

Column Name	Column Description
Auto Pay ID	Displays the automatic payment ID.
Account Number	Displays the account number for which the automatic payment is defined.
Account Information	Displays the concatenated string of information about the account separated by a comma (,).
	Note: It has a link. On clicking the link, the **Account** screen appears where you can view the details of the respective account.
Bill Information	Displays the concatenated string of information about the bill separated by a comma (,).
	Note: It has a link. On clicking the link, the **Bill** screen appears where you can view the bill details of the respective account.
Auto Pay Amount	Displays the automatic payment deduction amount.
Schedule Extract Date	Displays the scheduled date when the payment is debited from the account.
Eligible for Extraction	Displays the value of extraction.

In addition, the **Auto Pay Details** zone contains the following buttons:

Button Name	Button Description
Edit	Used to edit the schedule extract date of the auto pay request.
	Note: The **Edit** button appears when the auto pay request is in the **Draft** status.
Delete	Used to delete the auto pay request.

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Button Name	Button Description
	Note: The **Delete** button appears when the auto request is in the **Draft** status.

Related Topics

For more information on...	See...
How to edit the auto pay request details	Editing the Auto Pay Request Details on page 3972

Auto Pay Request - Bills

The **Bills** tab allows you to search with auto pay line items, that you want to add in the auto pay request. It contains the following zones:

- Search Bills on page 3968
- Auto Pay Line Items on page 3969

Search Bills

The **Search Bills** zone allows you to filter the bills using various search criteria. It contains the following two sections:

- **Search Criteria** - The **Search Criteria** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Person ID	Used to search bills of a particular person. **Note:** The **Search** (🔍) icon appears corresponding to the **Person ID** field. On clicking the **Search** icon, the **Person Search** window appears.	No
Account ID	Used to search bills which created for a particular account. **Note:** The **Search** (🔍) icon appears corresponding to the **Account ID** field. On clicking the **Search** icon, the **Account Search** window appears.	No
Bill ID	Used to search a particular bill. **Note:** The **Search** (🔍) icon appears corresponding to the **Bill ID** field. On clicking the **Search** icon, the **Bill Search** window appears.	No
Division	Used to search for bills which belong to a particular division.	Yes
From Bill Date	Used to search for bills which are created from a particular date onwards.	No

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Field Name	Field Description	Mandatory (Yes or No)
From Bill Due Date	Used to search for bills which are created from a particular due date onwards.	No
To Bill Date	Used to search for bills which are created till a particular date.	No
To Bill Due Date	Used to search bills which are created till a particular due date.	No
Eligible For Extraction	Used to indicate whether you want to search bills by eligibility for extraction criteria. The valid values are: • No • Yes	Yes

- **Search Results** - On clicking the **Search** button, the search results appear based on the specified search criteria. The **Search Results** section contains the following columns:

Column Name	Column Description
Bill ID	Displays the bill ID.
Bill Information	Display the concatenated string of information about the bill separated by a comma (,). **Note:** It has a link. On clicking the link, the **Bill** screen appears where you can view the details of the respective bill.
Bill Amount	Displays the bill amount (i.e. unpaid amount).
Account Information	Display the concatenated string of information about the account separated by a comma (,). **Note:** It has a link. On clicking the link, the **Account** screen appears where you can view the details of the respective account.

Note: Pagination is used to display limited number of records in the **Search Results** section. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

Related Topics

For more information on...	See...
How to search for a bill	Searching for a Bill on page 3976

Auto Pay Line Items

The **Auto Pay Line Items** zone displays the list of bills. It contains the following columns:

Column Name	Column Description
Auto Pay ID	Displays the automatic payment ID.
Account Number	Displays the account number for which the automatic payment is defined.
Account Information	Displays the concatenated string of information about the account separated by a comma (,).

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Column Name	Column Description
	Note: It has a link. On clicking the link, the **Account** screen appears where you can view the details of the respective account.
Auto Pay Amount	Displays the automatic payment deduction amount.
Auto Pay Creation Date	Displays the date when the account is created.
Eligible for Extraction	Displays the value of extraction.

Related Topics

For more information on...	See...
How to search for a bill	Searching for a Bill on page 3976
How to add an auto pay line item in an auto pay request	Adding an Auto Pay Line Item in an Auto Pay Request on page 3976

Auto Pay Request - Log

The **Log** tab contains the following zone:

- Auto Pay Request Log on page 3970

Auto Pay Request Log

The **Auto Pay Request Log** zone lists the complete trail of actions performed on the auto pay request. It contains the following columns:

Column Name	Column Description
Creation Date Time	Displays the date and time when the action was performed on the auto pay request.
Details	Displays the details about the action performed on the auto pay request.
User	Indicates the user who has performed the action on the auto pay request.
Log Type	Indicates the type of log.
Related Object	Indicates the object or entity which is created when the action is performed on the auto pay request.
	Note: At present, no data appears in this column. The implementation team can build the custom logic to meet the business requirements.
Status Reason	Indicates the reason why the auto pay request is rejected.

Note: You can manually add a log entry for the auto pay request by clicking the **Add Log Entry** link in the upper right corner of the **Auto pay Request Log** zone.

Related Topics

For more information on...	See...
How to view the log of an auto pay request	Viewing the Log of an Auto Pay Request on page 3979
How to add a log entry for an auto pay request	Adding a Log Entry for an Auto Pay Request on page 3979

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Defining a Characteristic for an Auto Pay Request

Prerequisites

To define a characteristic for an auto pay request, you should have:

- Characteristic types defined in the application (where the characteristic entity is set to **Auto Pay Request**)

Procedure

To define a characteristic for an auto pay request:

1. Click **Edit** button, on the **Auto Pay Request** zone in the Main tab of the**Auto Pay Request** screen.

   The **Characteristics** section contains the following fields in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Effective Date	Used to specify the date from when the characteristic is effective for the auto pay request.	Yes (Conditional) **Note:** This field is required while defining a characteristic for the auto pay request.
Characteristic Type	Used to indicate the characteristic type. **Note:** The list includes only those characteristic types where the characteristic entity is set to **Auto Pay Request**.	Yes (Conditional) **Note:** This field is required while defining a characteristic for the auto pay request.
Characteristic Value	Used to specify the value for the characteristic type. **Note:** If you select a predefined characteristic type, the **Search** (🔍) icon appears corresponding to the **Characteristic Value** field. On clicking the **Search** icon, the **Predefined Characteristic Search** window appears. On specifying the value for a predefined characteristic type, the description of the characteristic value appears corresponding to the **Characteristic Value** field.	Yes (Conditional) **Note:** This field is required while defining a characteristic for the auto pay request.

2. Enter the required details in the **Characteristics** section.
3. If you want to define more than one characteristic for the auto pay request, click the **Add** (+) icon and then *r*epeat step 2.

   Note: However, if you want to remove a characteristic from the auto pay request, click the **Delete** (🗑) icon corresponding to the characteristic.

4. Click **Save**.
   The characteristics are defined for the auto pay request.

Related Topics

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For more information on...	See...
Auto Pay Request zone	Auto Pay Request on page 3965
How to edit an auto pay request details	Editing the Auto Pay Request Details on page 3972

Editing the Auto Pay Request Details

Prerequisites

To edit an auto pay request details, you should have:

- Auto pay requests defined in the application

Procedure

To edit an auto pay request details:

1. Search for the auto pay request in the **Search Auto Pay Request** zone of the **Auto Pay Request** screen.
2. In the **Search Results** section, click the link in the **Auto Pay Request Information** column corresponding to the *a*uto pay request whose details you want to edit.
   The **Auto Pay Request** screen appears.
3. Ensure that the **Main** tab is selected.
4. Click the **Edit** button in the **Auto Pay Request** zone.

   The **Edit Auto Pay Request** screen appears. It contains the following sections:

   - **Main** - Used to specify the basic details about the auto pay request.
   - **Characteristics** - Used to define the characteristics for the auto pay request.

   The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Auto Pay Request Information	Displays the concatenated string of information about the auto pay request separated by a comma (,).	Not applicable
Comments	Used to specify additional information about the auto pay request.	No

5. Modify the required details in the **Main** section.
6. Define, edit, or remove characteristics from the auto pay request, if required.
7. Click **Save**.
   The changes made to the auto pay request are saved.

> **Note:** The **Edit** button appears only when the auto pay request is in the **Draft** status.

Related Topics

For more information on...	See...
How to search for an auto pay request	Searching for an Auto Pay Request on page 3963
Auto Pay Request screen	Auto Pay Request (Used for Searching) on page 3959
Auto Pay Request screen	Auto Pay Request (Used for Viewing) on page 3965
Auto Pay Request zone	Auto Pay Request Type on page 3948

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For more information on...	See...
How to define a characteristic for an auto pay request	Defining a Characteristic for an Auto Pay Request on page 3971

Deleting an Auto Pay Request

Procedure

To delete an auto pay request:

1. Search for the auto pay request in the **Search Auto Pay Request** zone of the **Auto Pay Request** screen.
2. In the **Search Results** section, click the link in the **Auto Pay Request Information** column corresponding to the *a*uto pay request that you want to delete.
   The **Auto Pay Request** screen appears.
3. Ensure that the **Main** tab is selected.
4. Click the **Delete** button in the **Auto Pay Request** zone.
   A message appears confirming whether you want to delete the auto pay request.
5. Click **OK**.
   The auto pay request is deleted.

> **Note:** The **Delete** button appears only when the auto pay request is in the **Draft** status.

Related Topics

For more information on...	See...
How to search for an auto pay request	Searching for an Auto Pay Request on page 3963
Auto Pay Request screen	Auto Pay Request (Used for Searching) on page 3959
Auto Pay Request zone	Auto Pay Request on page 3965

Submitting an Auto Pay Request

Prerequisites

To submit an auto pay request, you should have:

- At least one bill added to the auto pay request
- Automatic payment amount of each bill not equal to zero

Procedure

To submit an auto pay request:

1. Search for the auto pay request in the **Search Auto Pay Request** zone of the **Auto Pay Request** screen.
2. In the **Search Results** section, click the link in the **Auto Pay Request Information** column corresponding to the *a*uto pay request which you want to submit.
   The **Auto Pay Request** screen appears.
3. Ensure that the **Main** tab is selected.
4. Click **Submit** button in the **Auto Pay Request** zone.
   A message appears confirming whether you want to submit the auto pay request.
5. Click **OK**.
   The auto pay request is submitted.

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> **Note:**
>
> At least one auto pay record is required for submitting the auto pay request.
>
> The **Submit** button appears only when the auto pay request is in the **Draft** status.

Related Topics

For more information on...	See...
How to search for an auto pay request	Searching for an Auto Pay Request on page 3963
Auto Pay Request screen	Auto Pay Request (Used for Viewing) on page 3965
Auto Pay Request zone	Auto Pay Request on page 3965

Approving an Auto Pay Request

Prerequisites

To approve an auto pay request, you should have:

- At least one bill added to the auto pay request

Procedure

To approve an auto pay request:

1. Search for the auto pay request in the **Search Auto Pay Request** zone **Auto Pay Request** screen.
2. In the **Search Results** section, click the link in the **Auto Pay Request Information** column corresponding to the *a*uto pay request which you want to approve.
   The **Auto Pay Request** screen appears.
3. Ensure that the **Main** tab is selected.
4. Click the **Approve** button in the **Auto Pay Request** zone.
   A message appears confirming whether you want to approve the auto pay request.
5. Click **OK**.
   The auto pay request is approved.

> **Note:**
>
> You can approve the auto pay request only in the **Approval In Progress** status.
>
> You can approve the auto pay request only when the auto pay request is assigned to you for an approval.
>
> The **Approve** button appears only when the auto pay request is in the **Approval In Progress** status.

Related Topics

For more information on...	See...
How to search for an auto pay request	Searching for an Auto Pay Request on page 3963
Auto Pay Request screen	Auto Pay Request (Used for Viewing) on page 3965
Auto Pay Request zone	Auto Pay Request on page 3965

Rejecting an Auto Pay Request

Prerequisites

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To reject an auto pay request, you should have:

- At least one bill added to the auto pay request

Procedure

To reject an auto pay request:

1. Search for the auto pay request in the **Search Auto Pay Request** zone of the **Auto Pay Request** screen.
2. In the **Search Results** section, click the link in the **Auto Pay Request Information** column corresponding to the *a*uto pay request which you want to reject.
   The **Auto Pay Request** screen appears.
3. Ensure that the **Main** tab is selected.
4. Click the **Reject** button in the **Auto Pay Request** zone.
   A message appears confirming whether you want to reject the auto pay request.
5. Click **OK**.
   The auto pay request is rejected.

> **Note:**
>
> You can reject the auto pay request only in the **Approval In Progress** status.
>
> You can reject the auto pay request only when the auto pay request is assigned to you for an approval.
>
> The **Reject** button appears only when the auto pay request is in the **Approval In Progress** status.

Related Topics

For more information on...	**See...**
How to search for an auto pay request	Searching for an Auto Pay Request on page 3963
Auto Pay Request screen	Auto Pay Request (Used for Viewing) on page 3965
Auto Pay Request zone	Auto Pay Request on page 3965

Resubmitting an Auto Pay Request for Approval

Prerequisites

To resubmit an auto pay request, you should have:

- At least one bill added to the auto pay request

Procedure

To resubmit an auto pay request:

1. Search for the auto pay request in the **Search Auto Pay Request** zone of the **Auto Pay Request** screen.
2. In the **Search Results** section, click the link in the **Auto Pay Request Information** column corresponding to the *a*uto pay request which you want to resubmit.
   The **Auto Pay Request** screen appears.
3. Ensure that the **Main** tab is selected.
4. Click the **Resubmit** button in the **Auto Pay Request** zone.
   A message appears confirming whether you want to resubmit the auto pay request.
5. Click **OK**.
   The auto pay request is resubmitted.

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> **Note:**
>
> At least one auto pay record is required for resubmitting the auto pay request.
>
> The **Resubmit** button appears only when the auto pay request is in the **Approval In Progress** status.

Related Topics

For more information on...	See...
How to search for an auto pay request	Searching for an Auto Pay Request on page 3963
Auto Pay Request screen	Auto Pay Request (Used for Viewing) on page 3965
Auto Pay Request zone	Auto Pay Request on page 3965

Searching for a Bill

Prerequisites

To search for a bill in the search bills zone, you should have:

- Persons, Accounts, and Bills defined in the application

Procedure

To search for a bill in the search bills zone:

1. Search for the auto pay request in the **Search Auto Pay Request** zone of the **Auto Pay Request** screen.
   A list of auto pay requests that meet the search criteria appears in the **Search Results** section.
2. In the **Search Results** section, click the link in the **Auto Pay Request Information** column corresponding to the *a*uto pay request whose details you want to view.
   The **Auto Pay Request** screen appears.
3. Ensure that the **Bills** tab is selected.
4. Search for the bills in the **Search Bills** zone of the **Auto Pay Request** screen.
   A list of bills that meet the search criteria appears in the **Search Results** section.

Related Topics

For more information on...	See...
How to search for an auto pay request	Searching for an Auto Pay Request on page 3963
Auto Pay Request screen	Auto Pay Request (Used for Viewing) on page 3965
Search Bill zone	Search Bills on page 3968

Adding an Auto Pay Line Item in an Auto Pay Request

Prerequisites

To add an auto pay line item in an auto pay request, you should have:

- Bills defined in the application

Procedure

To add an auto pay line item in an auto pay request:

1. Search for the auto pay request in the **Search Auto Pay Request** zone of the **Auto Pay Request** screen.

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A list of auto pay requests that meet the search criteria appears in the **Search Results** section.

2. In the **Search Results** section, click the link in the **Auto Pay Request Information** column corresponding to the *a*uto pay request whose details you want to view.
   The **Auto Pay Request** screen appears.
3. Ensure that the **Bills** tab is selected.
4. Search for the bills in the **Search Bills** zone of the **Auto Pay Request** screen.
5. Click **Search**.
   A list of bills that meet the search criteria appears in the **Search Results** section.
6. Click the **Broadcast** (📡) icon corresponding to the bill that you want to add in an auto pay request.
   The **Auto Pay Line Items** zone appears.
7. Select the check box corresponding to the bill that you want to add in an auto pay request.
8. Click the **Add** button in the **Auto Pay Line Items** zone, to add the auto pay line item in an auto pay request.

> **Note:**
>
> The **Add** button appears only when the auto pay request is in the **Draft** status.

Related Topics

For more information on...	**See...**
How to search for an auto pay request	Searching for an Auto Pay Request on page 3963
Auto Pay Request screen	Auto Pay Request (Used for Viewing) on page 3965
Search Bills zone	Search Bills on page 3968
Auto Pay Line Items Zone	Auto Pay Line Items on page 3969

Deleting an Auto Pay Line Item from an Auto Pay Request

Prerequisites

To delete an auto pay line item from an auto pay request, you should have:

- Bills added in the auto pay request

Procedure

To delete an auto pay line item from an auto pay request:

1. Search for the auto pay request in the **Search Auto Pay Request** zone of the **Auto Pay Request** screen.
   A list of auto pay requests that meet the search criteria appears in the **Search Results** section.
2. In the **Search Results** section, click the link in the **Auto Pay Request Information** column corresponding to the *a*uto pay request whose auto pay line items you want to delete.
   The **Auto Pay Request** screen appears.
3. Ensure that the **Auto Pay Details** zone in the **Main** tab of **Auto Pay Request** screen is expanded.
   A list of auto pay line appears in the **Auto Pay Details** zone.
4. Select the check box corresponding to the auto pay line item which you want to delete from the auto pay request.
5. Click the **Delete** button in the **Auto Pay Details** zone, to delete the auto pay line item from an auto pay request.

   A message appears confirming whether you want to delete the auto pay line items from an auto pay request.
6. Click **OK**.
   The auto pay line items is deleted.

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Note:

At least one auto pay record is required for deleting the auto pay request.

The **Delete** button appears only when the auto pay request is in the **Draft** status.

Related Topics

For more information on...	See...
How to search for an auto pay request	Searching for an Auto Pay Request on page 3963
Auto Pay Request screen	Auto Pay Request (Used for Viewing) on page 3965
Auto Pay Request zone	Auto Pay Request on page 3965
Auto Pay Line Items Zone	Auto Pay Line Items on page 3969

Editing the Auto Pay Line Item Details in an Auto Pay Request

Prerequisites

To edit an auto pay line item in an auto pay request, you should have:

- Bills added in the auto pay request

Procedure

To edit an auto pay line item from an auto pay request:

1. Search for the auto pay request in the **Search Auto Pay Request** zone of the **Auto Pay Request** screen.
   A list of auto pay requests that meet the search criteria appears in the **Search Results** section.
2. In the **Search Results** section, click the link in the **Auto Pay Request Information** column corresponding to the *a*uto pay request whose auto pay line items you want to delete.
   The **Auto Pay Request** screen appears.
3. Ensure that the **Auto Pay Details** zone in the **Main** tab of **Auto Pay Request** screen is expanded.
   A list of auto pay line appears in the **Auto Pay Details** zone.
4. Select the Check box corresponding to the auto pay line item which you want to edit.
5. Click the **Edit** button in the **Auto Pay Delete** zone, to edit the auto pay line item from an auto pay request.

   On clicking **Edit** button, the **Edit Auto Pay Request Details** screen appears. It contains the following columns:

Column Name	Column Description	Mandatory (Yes or No)
Auto Pay ID	Displays the auto pay ID.	Not applicable
Account Number	Displays the account number.	Not applicable
Account ID	Displays the account ID.	Not applicable
Bill ID	Displays the bill ID.	Not applicable
Auto Pay Amount	Displays the amount of the automatic payment.	Not applicable
Schedule Extract Date	Used to specify date when you want to schedule the auto pay request for the auto pay line item.	Yes
Eligible For Extraction	Used to indicate whether the auto pay amount is debited from the account on a specified and scheduled extract date. The valid values are: • Yes	Yes

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Column Name	Column Description	Mandatory (Yes or No)
	• No	

6. Enter the required details in the**Edit Auto Pay Request Details** screen.
7. Click **Save**.
   The auto pay line item is modified.

Note:

At east one auto pay record is required for deleting the auto pay request.

The **Edit** button appears only when the auto pay request is in the **Draft** status.

Related Topics

For more information on...	See...
How to search for an auto pay request	Searching for an Auto Pay Request on page 3963
Auto Pay Request screen	Auto Pay Request (Used for Viewing) on page 3965
Auto Pay Request zone	Auto Pay Request on page 3965
Auto Pay Line Items Zone	Auto Pay Line Items on page 3969

Viewing the Log of an Auto Pay Request

Procedure

To view the log of an auto pay request:

1. Search for the auto pay request in the **Search Auto Pay Request** zone of the **Auto Pay Request** screen.
2. In the **Search Results** section, click the link in the **Auto Pay Request Information** column corresponding to the *a*uto pay request whose details you want to view.
   The **Auto Pay Request** screen appears.
3. Click the **Log** tab.
   The **Log** tab appears.
4. View the complete trail of actions performed on the auto pay request in the **Auto Pay Request Log** zone.

Related Topics

For more information on...	See...
How to search for an auto pay request	Searching for an Auto Pay Request on page 3963
Auto Pay Request screen	Auto Pay Request (Used for Viewing) on page 3965
Auto Pay Request Log zone	Auto Pay Request Log on page 3970
How to add a log entry for an auto pay request	Adding a Log Entry for an Auto Pay Request on page 3979

Adding a Log Entry for an Auto Pay Request

Procedure

To add a log entry for an auto pay request:

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1. Search for the auto pay request in the **Search Auto Pay Request** zone of the **Auto Pay Request** screen.
2. In the **Search Results** section, click the link in the **Auto Pay Request Information** column corresponding to the *a*uto pay request for which you want to add a log entry.
   The **Auto Pay Request** screen appears.
3. Click the **Log** tab.
   The **Log** tab appears.
4. Click the **Add Log Entry** link in the upper right corner of the **Auto Pay Request Log** zone.

   The **Add Request Log** window appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Auto Pay Request ID	Displays the auto pay request ID.	Not applicable
Log Details	Used to specify additional comments for the auto pay request.	Yes

5. Enter the comments in the **Log Details** field.
6. Click **Save**.
   The log entry is added in the **Auto Pay Request Log** zone.

Related Topics

For more information on...	See...
How to search for an auto pay request	Searching for an Auto Pay Request on page 3963
Auto Pay Request screen	Auto Pay Request (Used for Viewing) on page 3965
Auto Pay Request Log zone	Auto Pay Request Log on page 3970

Chapter 48

Garbling Customer Information

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

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

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

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

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

- ACCOUNT_NBR
- ACCT_NBR
- ADDRESS1
- ADDRESS1_UPR
- ADDRESS2
- ADDRESS3
- ADDRESS4
- BIRTH_DT
- BROKER_NAME
- CITY
- COUNTRY
- COUNTY
- CUSTOMER_NAME
- EMAILID
- ENTITY_NAME
- ENTITY_NAME1
- ENTITY_NAME2
- ENTITY_NAME3
- GEO_CODE
- HOUSE_TYPE

- IN_CITY_LIMIT
- NAME1
- OVRD_MAIL_NAME1
- OVRD_MAIL_NAME2
- OVRD_MAIL_NAME3
- PER_ID_NBR
- PHONE
- POSTAL
- POSTAL_UPR
- STATE

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

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

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

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

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

Chapter 49

Deleting Inactive Customer or Closed Account Information

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

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

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

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

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

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

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

- **Account ID** - Used to indicate the account whose records you want to delete from the system.
- **Person ID** - Used to indicate the person whose records you want to delete from the system.
- **Delete Characteristic Type** - Used to specify the characteristic type. Here, you must specify the **C1-GDPRE** characteristic type. The system then considers those person or accounts for deletion where the **C1-GDPRE** characteristic is set to **Y**.
- **Clear CLOB Data** - Used to indicate whether you want to delete the references of the persons or accounts considered for deletion from the CLOB data. The valid values are **Y** and **N**. Note that if you set the value for this

parameter to **Y**, the performance of the batch would be impacted when there is voluminous data.

- **Thread Pool Name** - Used to specify the thread pool on which you want to execute the batch.

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

Chapter 50

Automatic Refund

Until now, the system considered the records with the debit amount in the **CI_BILL_ACH** table during the **Create Automatic Payments and Refunds (APAYCRET)** batch execution. Now, the system considers the records with the debit and credit amount in the **CI_BILL_ACH** table during the **Create Automatic Payments and Refunds (APAYCRET)** batch execution. If the automatic payment amount stamped against a bill is in debit, the batch creates automatic payment and payment event for such bill. It also creates a clearing record for each automatic payment in the **CI_APAY_CLR_STG** table. The payment freeze date in the clearing records is set to NULL. The automatic payment is created when an algorithm using the **APAY-CREATE** algorithm type is created and attached to the **Automatic Payment Creation** system event in the installation options.

However, if the automatic payment amount stamped against a bill is in credit, the batch creates a refund request against the bill. The refund request is created when an algorithm using the **C1-AREF-CRET** algorithm type is created and attached to the **Automatic Adjustment Creation** system event in the installation options. This algorithm indicates the refund request type using which the refund request must be created. If the approval workflow is configured for the refund request type, the status of the refund request is set to **Pending for Approval**. However, if the approval workflow is not configured for the refund request type, the status of the refund request is set to **Processed** and the refund adjustment is created in the **Frozen** status. In addition, it creates a clearing record for each automatic refund in the **CI_ADJ_CLR_STG** table.

The refund request and refund adjustments are created when the automatic payment amount is in credit irrespective of whether the **Autopay Creation Option** field in the installation options is set to **Create At Bill Completion**, **Create On Extract Date**, or **Freeze Payment on Notification**.

Note: In the **Freeze Payment on Notification** feature, the automatic payments and refunds are created. However, at present, you cannot activate and extract the automatic refund clearing records using the **Activate Automatic Payments (ACTVTAPY)** and **Extract Automatic Payments (APAYACH)** batches, respectively. The implementation team will have to develop the custom logic to activate and extract automatic refund clearing records in a flat file.

If required, you can void the refund request and cancel the refund adjustments from the user interface. If the **Autopay Creation Option** field in the installation options is set to **Freeze Payment on Notification**, you can void the refund request and cancel the refund adjustments using the **Cancel Automatic Refunds (AREFRA)** batch once the review comments are stored in the staging tables.

Chapter 51

Payment Distribution

Topics:

- Account Level Payment Distribution
- Statement Level Payment Distribution
- Person Level Payment Distribution

Until now, you were able to distribute payments against a particular bill and/or contract. Now, the system enables you to distribute payments against the unpaid bills of the account or statement. For more information, refer to the following topics:

- Account Level Payment Distribution on page 3988
- Statement Level Payment Distribution on page 3989

Account Level Payment Distribution

Until now, you were able to match a payment against a particular bill of an account. Oracle Revenue Management and Billing now provides the ability to apply a payment on an account which will get matched against the unpaid bills of the account. This feature is only applicable for accounts which practice open item accounting. The system supports the account level payment distribution through the following modes:

- Inbound web service
- EDI 820 file
- Payment request
- Payment upload

While creating a match type for the account level payment distribution, you must set the entity type of the match type to **Account**. Earlier, the manual distribution algorithm of a match type was invoked only when the payment distribution was done through the payment request feature. Now, the manual distribution algorithm of a match type is invoked when the payment distribution is done using any of the above modes. The existing manual distribution algorithm spot of a match type is enhanced to support the account level payment distribution. In case of the account level payment distribution, the manual distribution algorithm spot receives the account ID as the input parameter. When this algorithm spot is invoked through the payment request feature, the account ID is passed as the match value. However, when this algorithm spot is invoked through the inbound web service, EDI 820, and payment upload feature, the account ID is not passed as the match value. Instead, the payment is distributed using the payee account ID. The manual distribution algorithm spot then returns a list of unpaid bills of the account.

A new manual distribution algorithm named **C1-MD-ACCT** is introduced in this release. It distributes the payment amount against the unpaid bills of the account in the ascending order of due date (i.e. bill with the oldest due date will have high priority). If there are multiple unpaid bills with the same due date, the system distributes the payment amount against the unpaid bills in the ascending order of the unpaid amount (i.e. bill with the lowest amount will have high priority). And, if there are two or more unpaid bills with the same due date and unpaid amount, the system will randomly distribute the payment amount against any of the unpaid bills of the account.

Once the system distributes the payment amount against the unpaid bills of the account, the system creates a payment for each unpaid bill. Here, all these payments would be created under the same payment event.

Any excess amount that is left after distributing the payments on the unpaid bills of the account should be applied on the on-account contract of the account. The system derives the on-account contract using the contract type specified in the **On-Account Contract Type** option type of the **C1-ADJ-PAY** feature configuration. If the on-account contract of the specified contract type is not available for the account, the system creates on-account contract using the contract type specified in the **On-Account Contract Type** option type of the **C1-ADJ-PAY** feature configuration. The system then parks the excess credit payment on the on-account contract of the account.

While creating the excess credit payment, the system uses the match type which is specified in the **On-Account Match Type** option type of the **C1-ADJ-PAY** feature configuration.

Once all payments including the excess credit payment is created, the system will store the payee account ID on all payments when the payment is applied at the account level. The payee account ID is stored as a characteristic using the characteristic type which is specified in the **Account Level Payment Characteristic Type** option type of the **C1-ADJ-PAY** feature configuration. The **C1-ACPAY** characteristic type is shipped with the product.

Note that you can apply payments on the account level using the single-step approach of the **PUPL** batch and not using the three-step approach of the **PUPL** batch. Also, note that multi tender distribution is not supported for the account level payment distribution.

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Statement Level Payment Distribution

Until now, you were able to match a payment against a particular bill of an account. Oracle Revenue Management and Billing now provides the ability to apply a payment on a statement which will get matched against the unpaid bills on the statement. The bills on a statement may belong to the same or different accounts of the person for whom the statement is created using the statement construct. Note that the system supports the statement level payment distribution for those statements:

- Which are created using the statement constructs comprising of one or more accounts and no contracts (under construct details)
- Which are in the **Printed** status

This feature is only applicable for accounts which practice open item accounting. The system supports the statement level payment distribution through the following modes:

- Inbound web service
- EDI 820 file
- Payment request
- Payment upload

While creating a match type for the statement level payment distribution, you must set the entity type of the match type to **Statement**. Earlier, the manual distribution algorithm of a match type was invoked only when payment distribution was done through the payment request feature. Now, the manual distribution algorithm of a match type is invoked when the payment distribution is done using any of the above modes. The existing manual distribution algorithm spot of a match type is enhanced to support the statement level payment distribution. In case of the statement level payment distribution, the manual distribution algorithm spot receives the statement ID as the input parameter. When this algorithm spot is invoked through the payment request feature, the statement ID is passed as the match value. However, when this algorithm spot is invoked through the inbound web service, EDI 820, or payment upload feature, the statement ID is not passed as the match value. Instead, the statement ID is directly fetched from the dataset. The manual distribution algorithm spot then returns a list of unpaid bills on the statement.

A new manual distribution algorithm named **C1-MD-STMT** is introduced in this release. It distributes the payment amount against the unpaid bills of the statement in the ascending order of due date (i.e. bill with the oldest due date will have high priority). If there are multiple unpaid bills with the same due date, the system distributes the payment amount against the unpaid bills in either of the following two ways:

- In the ascending order of the unpaid amount (i.e. bill with the lowest amount will have high priority)
- Using the weighted distribution based on the unpaid amount of each bill

If you want to distribute the payment amount using the former method, you must set the **Weighted distribution of payments among bills of same age. (Valid Values :Y,N)** parameter of the **C1-MD-STMT** algorithm to **N**. However, if you want to distribute the payment amount using the latter method, you must set the **Weighted distribution of payments among bills of same age. (Valid Values :Y,N)** parameter of the **C1-MD-STMT** algorithm to **Y**.

Once the system distributes the payment amount against the unpaid bills of the statement, the system creates a payment for each unpaid bill. Here, all these payments would be created under the same payment event.

Any excess amount that is left after distributing the payments on the unpaid bills of the statement should be applied on the on-account contract of the account. The person linked to the statement construct using which the statement is created should have an account which will be used to park the excess amount paid on a statement. If the account is not available and the payment against a statement is in excess of the total unpaid balance of the statement, then the entire payment on the statement ID will be errored out and won't be applied on any of the bills.

The system derives the on-account contract of the account using the contract type specified in the **On-Account Contract Type** option type of the **C1-ADJ-PAY** feature configuration. If the on-account contract of the specified contract type is not available for the account, the system creates on-account contract using the contract type specified in the **On-Account Contract Type** option type of the **C1-ADJ-PAY** feature configuration. The system then parks the excess credit

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payment on the on-account contract of the account. While creating the excess credit payment, the system uses the match type which is specified in the **On-Account Match Type** option type of the **C1-ADJ-PAY** feature configuration.

Once all payments including the excess credit payment is created, the system will store the statement ID on all payments when the payment is applied at the statement level. The statement ID is stored as a characteristic using the characteristic type which is specified in the **Statement Level Payment Characteristic Type** option type of the **C1-ADJ-PAY** feature configuration. The **C1-STPAY** characteristic type is shipped with the product.

Note that you can apply payments on the statement level using the single-step approach of the **PUPL** batch and not using the three-step approach of the **PUPL** batch. Also, note that multi tender distribution is not supported for the statement level payment distribution.

Note: At the moment, you can delete a statement which is used for the payment distribution from the user interface. The system neither performs any validation during the statement deletion nor cancels any payments when a statement is deleted. Therefore, you need to ensure that you do not delete any statements which are used for payment distribution in the system.

Person Level Payment Distribution

Oracle Revenue Management and Billing provides the ability to apply a payment to a person. The system will then distribute the payment amount against the unpaid bills of the person's accounts and all its child persons' accounts. This feature is only applicable for person's and its child persons' accounts that practice open item accounting. At present, the system supports the person level payment distribution only through the **Payment Request** feature and not through any other payment methods (such as, inbound web service, EDI 820, or payment upload). You can opt for the person level payment distribution while creating or transferring a payment through the **Payment Request** feature.

While creating a match type for the person level payment distribution, you must set the entity type of the match type to **Person**. A new algorithm type named **C1-MD-PER** is introduced in this releases.

It enables you to fetch all the open bills of the person and its child persons in the hierarchy. If the **Invoice Type Characteristic Type** and **Invoice Type Characteristic Value** parameters are defined in the algorithm, the system will retrieve open bills of only those accounts from the person hierarchy where the given characteristic is defined for the account with the respective value. However, if the **Invoice Type Characteristic Type** and **Invoice Type Characteristic Value** parameters are not defined in the algorithm, the system will retrieve all the open bills from the person hierarchy. In case you want to match payment against the accounts with different invoice types (i.e., Claims and Admin), you need to define two algorithms using the **C1-MD-PER** algorithm type with different invoice types (i.e., one with invoice type set to Claims and another with invoice type set to Admin) and then specify both the match types in the payment creation or transfer request. Note that there are few behavioral exceptions while using the person level payment distribution option:

- You can use multiple match types in the payment creation or transfer request. But, while using the match type where the entity type is set **Person**, you cannot use any another match type where the entity type is set to **Account** or **Bill**. You are only allowed to use additional match types where the entity type is set **Person**.
- Any excess amount is applied only to the payor account and not to each payee account.
- Excess amount is distributed only when the payment is manually distributed by clicking either **Distribute** or **Distribute and Freeze** button and not when the payment creation or transfer request is created in the **Draft** status.

A new algorithm type named **C1-DFT-EXS** is introduced in this release. To use the person level payment distribution option in the **Payment Request** feature, you need to attach an algorithm created using the **C1-DFT-EXS** algorithm type to the **Enter** system event of the **Distribute** and **Distribute And Freeze** status (with highest sequence number) in the **C1-PaymentRequest** business object.

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

- A new option type named **Person Level Payment Characteristic Type** is added to the **C1-ADJ-PAY** feature configuration.
- A new option type named **FK Reference for Account** is added to the **C1-PAYPORTAL** feature configuration.
- Two new algorithm types are introduced in this release - **C1-MD-PER** and **C1-DFT-EXS**.

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- Two existing algorithm types named **C1-PAY-DFT** and **C1-PAYREQPOS** are enhanced to validate whether all the match types specified in the payment creation or transfer request have entity type set to **Person**.
- The **C1-PAYCREATE** algorithm type is enhanced to stamp person ID as a characteristic on the payment when it applied using a match type where the entity type is set to **Person**.

Note: You need to set the above-mentioned new option types in the **C1-ADJ-PAY** and **C1-PAYPORTAL** feature configurations. In addition, you need to add one more value named **DST.UNPAID_AMT** for the **Bill** option type in the **C1-PYREQSRT** feature configuration.

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Chapter 52

Mass Payment Transfer

Topics:

- Full Payment Transfer
- Partial Payment Transfer
- Mass Payment Transfer Process
- CSV File Format for Mass Payment Transfer
- Sample CSV File for Mass Payment Transfer

Oracle Revenue Management and Billing facilitates mass payment transfer using the **File Upload Interface** feature. In the mass payment transfer, you can transfer multiple payments at once. You can transfer payments at the payment or payment event level (i.e. transfer an individual payment or all payments of a payment event at once). However, note that you can transfer only those payments which are in the **Frozen** status.

You can upload the data for either full or partial payment transfer in the CSV format through the **File Transformation and Upload (C1-FTRAN)** batch. While executing the **File Transformation and Upload (C1-FTRAN)** batch, you need to specify a file request type which indicates the XPath of the fields where the data from the CSV record should be stored while transforming the data in the XML format using the **C1-TransferPaymentService** business service. Once each CSV file record is transformed in the XML format, you can transfer payments through the **File Request Processing (C1-FREQP)** batch.

Full Payment Transfer

You can upload the data for full payment transfer from the CSV file using the **File Upload Interface** utility. Ideally, you should not specify the transfer amount during the full payment transfer. If you do not specify the transfer amount or if the transfer amount is equal to the payment amount or to the sum of all frozen payments in the payment event, the system does the full payment transfer. However, if the transfer amount is less than the payment amount or the sum of all frozen payments in the payment event, the system does the partial payment transfer. Note that the payment transfer amount should not be more than the payment amount or the sum of all frozen payments in the payment event. Also, note that you should only transfer positive payments which are in the **Frozen** status and where the payment amount is greater than zero using the **File Upload Interface** utility.

While doing full payment transfer at the payment level, the system cancels the old payment and creates one new payment using the specified match type in the **Frozen** status. For example, the P1 payment is created against the contract of the A1 account, as shown in the following table:

The following table provides information about the payment created against A1 account through the PE1 payment event:

Account	Payment Event	Payment Details	Match Type	Match Value	Amount	Status
A1	PE1	P1	Suspense Contract	C1	$200	Frozen

Now, when you fully transfer the payment using the match type as Bill from the A1 to A2 account, the system will cancel the old payment and create a new payment as shown in the following table:

The following table provides information about the payment transfer from A1 account to A2 account:

Account	Payment Event	Payment Details	Match Type	Match Value	Amount	Status
A1	PE1	P1	Suspense Contract	C1	$200	Canceled
A2	PE2	P2	Bill	Bill1	$200	Frozen

While doing full payment transfer at the payment event level, the system fetches the list of frozen payments linked to the payment event and then adds them in the **C1_PAY_DETAILS** table. In addition, the system sets the **PY_CANCEL_SW** column corresponding to the payments in the **C1_PAY_DETAILS** table to **Y**. Let us assume that the following payments are made to the A1 account through the PE1 payment event:

The following table provides information about the payments made to A1 account through the PE1 payment event:

Account	Payment Event	Payment Details	Match Type	Match Value	Amount	Status
A1	PE1	P1	Suspense Contract	C1	$100	Frozen
		P2	On Account Contract	C2	$50	Frozen
		P3	Suspense Contract	C3	$100	Frozen
		P4	Overpayment on Bill	C4	$100	Frozen
		P5	On Account Contract	C5	$100	Frozen

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Account	Payment Event	Payment Details	Match Type	Match Value	Amount	Status
		P6	Suspense Contract	C1	$100	Frozen
		P7	On Account Contract	C5	$100	Frozen
		P8	Overpayment on Bill	C4	$75	Canceled
		P10	Bill	Bill1	$200	Frozen
		P11	Bill	Bill2	$100	Frozen
		P12	Bill	Bill3	$350	Frozen
		P13	Bill	Bill2	$25	Canceled

Now, if you want to fully transfer the payments from the A1 account to the A2 account using the match type as Bill, the system considers the following payments for transfer from the payment list:

The following table provides information about the payments made from A1 account to A2 account through the PE1 payment event:

Account	Payment Event	Payment Details	Match Type	Match Value	Amount	Status
A1	PE1	P1	Suspense Contract	C1	$100	Frozen
		P2	On Account Contract	C2	$50	Frozen
		P3	Suspense Contract	C3	$100	Frozen
		P4	Overpayment on Bill	C4	$100	Frozen
		P5	On Account Contract	C5	$100	Frozen
		P6	Suspense Contract	C1	$100	Frozen
		P7	On Account Contract	C5	$100	Frozen
		P10	Bill	Bill1	$200	Frozen
		P11	Bill	Bill2	$100	Frozen
		P12	Bill	Bill3	$350	Frozen

Then, the system will cancel the old payments and create a new payment, as shown in the following table:

The following table provides information about the payment created against A1 account through the PE1 payment event:

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Account	Payment Event	Payment Details	Match Type	Match Value	Amount	Status
A1	PE1	P1	Suspense Contract	C1	$100	Canceled
		P2	On Account Contract	C2	$50	Canceled
		P3	Suspense Contract	C3	$100	Canceled
		P4	Overpayment on Bill	C4	$100	Canceled
		P5	On Account Contract	C5	$100	Canceled
		P6	Suspense Contract	C1	$100	Canceled
		P7	On Account Contract	C5	$100	Canceled
		P10	Bill	Bill1	$200	Canceled
		P11	Bill	Bill2	$100	Canceled
		P12	Bill	Bill3	$350	Canceled
A2	PE2	P1	Bill	Bill4	$1300	Frozen

Partial Payment Transfer

You can upload the data for partial payment transfer from the CSV file using the **File Upload Interface** utility. The transfer amount is required for partial payment transfer. Therefore, the **Transfer Amount** column should be added in the CSV file while uploading the data for partial payment transfer. You should update the existing file request type to include the **Transfer Amount** field in the **Field Transformation** section.

You can specify the transfer amount either less than or equal to the payment amount or to sum of all frozen payments in the payment event depending on whether payment transfer is done at the payment or payment event level. If you do not specify the transfer amount or if the transfer amount is equal to the payment amount or to the sum of all frozen payments in the payment event, the system does the full payment transfer. However, if the transfer amount is less than the payment amount or the sum of all frozen payments in the payment event, the system does the partial payment transfer. Note that the payment transfer amount should not be more than the payment amount or the sum of all frozen payments in the payment event. Also, note that you should only transfer positive payments which are in the **Frozen** status and where the payment amount is greater than zero using the **File Upload Interface** utility.

While doing partial payment transfer at the payment level, the system cancels the old payment and creates two new payments in the **Frozen** status - one with the transfer amount using the specified match type and another with the remaining amount (if any) using the match type of the old payment. For example, the P1 payment is created against the contract of the A1 account, as shown in the following table:

The following table provides information about the payment created against A1 account through the PE1 payment event:

Account	Payment Event	Payment Details	Match Type	Match Value	Amount	Status
A1	PE1	P1	Suspense Contract	C1	$200	Frozen

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Now, when you partially transfer $150 of payment using the match type as Bill from the A1 to A2 account, the system will cancel the old payment and create the new payments as shown in the following table:

The following table provides information about the payment transfer from A1 account to A2 account:

Account	Payment Event	Payment Details	Match Type	Match Value	Amount	Status
A1	PE1	P1	Suspense Contract	C1	$200	Canceled
A2	PE2	P2	Bill	Bill1	$150	Frozen
A1	PE1	P3	Suspense Contract	C1	$50	Frozen

While doing partial payment transfer at the payment event level, the system fetches the list of frozen payments linked to the payment event and then identifies the payments which are eligible for transfer from the payment list in the following manner:

1. If the payments are created against the contracts, the system considers the following option types of the **C1_CMO** feature configuration to determine the payments which are eligible for transfer from the payment list:
   - Suspense Contract Type
   - On Account Contract Type
   - Excess Credit Contract Type

   For more information about the **C1_CMO** feature configuration, see Setting the C1_CMO Feature Configuration on page 4439.
2. However, if the payments are created against the bills, the system considers the bill date and bill amount to determine the payments which are eligible for transfer from the payment list.

The payments which are eligible for transfer from the payment list are added in the **C1_PAY_DETAILS** table. The system stamps the transfer priority corresponding to eligible payments in the **TRANSFER_PRIORITY** column of the **C1_PAY_DETAILS** table. The system assigns transfer priority to each eligible payment in the following sequence:

1. Considers payments against the contracts which are created using the contract type specified in the **Suspense Contract Type** option type of the **C1_CMO** feature configuration. If there are multiple payments which are created on the suspense contracts, the system assigns the same transfer priority to these payments. For example, if you partially transfer P1 and P2 from the A1 account to the A2 account through a payment transfer request where P1 is created against C1, P2 is created against C2, and C1 and C2 are both suspense contracts, then the system sets the transfer priority of P1 and P2 to 1 in the payment transfer request.
2. Considers payments against the contracts which are created using the contract type specified in the **On Account Contract Type** option type of the **C1_CMO** feature configuration. For example, if you partially transfer P1 and P2 from the A1 account to the A2 account through a payment transfer request where P1 is created against C1, P2 is created against C2, C1 is a suspense contract, and C2 is an on account contract, then the system sets the transfer priority of P1 to 1 and P2 to 2 in the payment transfer request. However, if you partially transfer P3 from the A1 account to the A2 account through a payment transfer request where P3 is created against C3 and C3 is an on account contract, then the system sets the transfer priority of P3 to 1 in the payment transfer request. If there are multiple payments on the on account contracts, the system assigns the same transfer priority to these payments. For example, if you partially transfer P1, P2, and P3 from the A1 account to the A2 account through a payment transfer request where P1 is created against C1, P2 is created against C2, P3 is created against C3, C1 is a suspense contract, and C2 and C3 are both on account contracts, then the system sets the transfer priority of P1 to 1 and P2 and P3 to 2 in the payment transfer request.
3. Considers payments against the contracts which are created using the contract type specified in the **Excess Credit Contract Type** option type of the **C1_CMO** feature configuration. For example, if you partially transfer P1 and P2 from the A1 account to the A2 account through a payment transfer request where P1 is created against C1, P2 is created against C2, C1 is an on account contract, and C2 is an excess credit contract, then the system sets the transfer priority of P1 to 1 and P2 to 2 in the payment transfer request. However, if you partially transfer P3 from the A1 account to the A2 account through a payment transfer request where P3 is created against C3 and C3 is an

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excess credit contract, then the system sets the transfer priority of P3 to 1 in the payment transfer request. If there are multiple payments on the excess credit contracts, the system assigns the same transfer priority to these payments. For example, if you partially transfer P1, P2, and P3 from the A1 account to the A2 account through a payment transfer request where P1 is created against C1, P2 is created against C2, P3 is created against C3, C1 is a suspense contract, and C2 and C3 are both excess credit contracts, then the system sets the transfer priority of P1 to 1 and P2 and P3 to 2 in the payment transfer request.

4. Considers payments created against the bills in the descending order of the bill date (i.e. bill with the latest date). If there are multiple payments which are created against the bills having the same bill date, the system considers the payments which are created against the bills in the descending order of the bill amount (i.e. bill with the highest amount). However, if there are multiple payments which are created against the bills having the same bill date and bill amount, the system assigns the same transfer priority to these payments. For example, if you partially transfer P1, P2, P3, and P4 from the A1 account to the A2 account through a payment transfer request where P1 is created against B1 (with the bill date 01-Jan-2020 and bill amount $100), P2 is created against B2 (with the bill date 01-Feb-2022 and bill amount $20), P3 is created against B3 (with the bill date 01-Mar-2022 and bill amount $30), and P4 is created against B4 (with the bill date as 01-Mar-2022 and bill amount $40), the system sets the transfer priority of P4 to 1, P3 to 2, P2 to 3, and P1 to 4, respectively, in the payment transfer request.
5. Considers payments which are created against entities other than contracts or bills and assigns the same transfer priority to these payments.

In addition, the system sets the **PY_CANCEL_SW** column corresponding the payments in the **C1_PAY_DETAILS** table to **Y** or **N** depending on whether these eligible payments are considered for transfer or not. Let us assume that the following payments are made to the A1 account through the PE1 payment event:

The following table provides information about the payments created against A1 account through the PE1 payment event:

Payment Details	Match Type	Match Value	Contract Type	Bill Date	Amount	Status
P1	Suspense Contract	C1	CT1		$100	Frozen
P2	On Account Contract	C2	CT2		$50	Frozen
P3	Suspense Contract	C3	CT3		$100	Frozen
P4	Overpayment on Bill	C4	CT4		$100	Frozen
P5	On Account Contract	C5	CT5		$100	Frozen
P6	Suspense Contract	C1	CT1		$100	Frozen
P7	On Account Contract	C5	CT5		$100	Frozen
P8	Overpayment on Bill	C4	CT4		$75	Canceled
P10	Bill	Bill1		21-Mar-2021	$200	Frozen
P11	Bill	Bill2		21-Feb-2021	$100	Frozen
P12	Bill	Bill3		21-Jan-2021	$350	Frozen
P13	Bill	Bill2		22-Feb-2021	$25	Frozen

And, let us assume that the **Suspense Contract Type**, **On Account Contract Type**, and **Excess Credit Contract Type** option types of the **C1_CMO** feature configuration are set to CT1, CT5, and CT4, respectively.

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Now, if you want to partially transfer $900 of payment from the A1 account to the A2 account using the match type as Bill, the system considers the following payments for transfer from the payment list using the given transfer priority:

The following table provides information about the payments made from A1 account to A2 account:

Payment Details	Match Type	Match Value	Contract Type	Bill Date	Amount	Eligible for Transfer	Transfer Priority	Cancel Switch
P1	Suspense Contract	C1	CT1		$100	Y	1	Y
P2	On Account Contract	C2	CT2		$50	N		N
P3	Suspense Contract	C3	CT3		$100	N		N
P4	Overpayment on Bill	C4	CT4		$100	Y	3	Y
P5	On Account Contract	C5	CT5		$100	Y	2	Y
P6	Suspense Contract	C1	CT1		$100	Y	1	Y
P7	On Account Contract	C5	CT5		$100	Y	2	Y
P8	Overpayment on Bill	C4	CT4		$75	N		N
P10	Bill	Bill1		21-Mar-2021	$200	Y	4	Y
P11	Bill	Bill2		21-Feb-2021	$100	Y	6	Y
P12	Bill	Bill3		21-Jan-2021	$350	Y	7	Y
P13	Bill	Bill2		22-Feb-2021	$25	Y	5	Y

If the remaining transfer amount is greater than zero after considering frozen payments against the above mentioned contracts and bills of the account, the system will randomly consider other payments from the payment list which are created against entities other than the above mentioned contracts and bills of the account and assign the same transfer priority to all such payments.

While partially transferring at the payment event level, the system will cancel all payments which are transferred and then create new payments using the specified match type. Here, the status of the old payments is changed to **Canceled** and the status of the new payments is set to **Frozen**. In addition, if there is a remaining balance on any payment which is considered for transfer, the system will create a new payment for the remaining amount using the match type which is specified in the old payment. The payment for the remaining amount is created in the **Frozen** status. In the above example, the system will cancel the old payments and create the new payments, as shown in the following table:

The following table provides information about the balance payments considered for transfer:

Payment Details	Match Type	Match Value	Contract Type	Bill Date	Amount	Status
P1	Suspense Contract	C1	CT1		$100	Canceled
P4	Overpayment on Bill	C4	CT4		$100	Canceled
P5	On Account Contract	C5	CT5		$100	Canceled
P6	Suspense Contract	C1	CT1		$100	Canceled

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Payment Details	Match Type	Match Value	Contract Type	Bill Date	Amount	Status
P7	On Account Contract	C5	CT5		$100	Canceled
P10	Bill	Bill1		21-Mar-2021	$200	Canceled
P11	Bill	Bill2		21-Feb-2021	$100	Canceled
P12	Bill	Bill3		21-Jan-2021	$350	Canceled
P13	Bill	Bill2		22-Feb-2021	$25	Canceled
P14	Bill	Bill4		21-Jan-2021	$900	Frozen
P15	Bill	Bill3		21-Jan-2021	$275	Frozen

Mass Payment Transfer Process

The following are the different steps involved in the Mass Payment Transfer process:

1. Defining a File Request Type for Payment Transfer on page 4000
2. Uploading a Payment Transfer File on page 4001
3. Transferring Payments on page 4002

Defining a File Request Type for Payment Transfer

Procedure

To define a file request type for payment transfer:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **F** and then click **File Request Type**.
   A sub-menu appears.
3. Click the **Add** option from the **File Request Type** sub-menu.
   The **File Request Type** screen appears.
4. Do the following in the **Main** section:
   a) Enter the file request type and description in the respective fields.
   b) Select the **Data Transformation Required** option.
   The **File Format** and **File Extension** fields are enabled. In addition, the **Root XML Tag** field appears in the **Main** section.
   c) Select the **Comma Separated Values** option from the **File Format** list.
   d) Enter `csv` in the **File Extension** field.
   e) Ensure that the **C1-FRTA** algorithm is attached to the **Data Transformation Algorithm** field.
5. Do the following in the **Services** section:
   a) Enter the sequence number in the respective field.
   b) Select the **Business Service** option from the **Service Type** list.
   c) Enter the **C1-TransferPaymentService** business service in the **Service Name** field.
   d) Select the **Update** option from the **Operation** list.
6. If you have included a header in the CSV file, add the appropriate details in the **Header Transformation** section.

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7. Similarly, if you have included a footer in the CSV file, add the appropriate details in the **Footer Transformation** section.
8. In the **Field Transformation** section, you need to specify the following details:

Field Name	Field Description	Mandatory (Yes or No)
Sequence	Used to indicate the data field in the CSV record which you want to upload in the system.	Yes
Field Name	Used to indicate the field for which you want to upload the data in the system.	Yes
Map Field XPath	Used to specify the XPath of the field where you want to store the data field from the CSV record.	Yes

While creating a file request type for mass payment transfer, you need to specify the following field mappings in the **Field Transformation** section:

Sequence	Field Name	Map Field XPath
1	PAY_EVENT_ID	C1-TransferPaymentService/ paymentEventId
2	PAY_ID	C1-TransferPaymentService/ paymentId
3	TRANSFER_TYPE	C1-TransferPaymentService/ transferType
4	TRANSFER_REASON	C1-TransferPaymentService/ transferReason
5	MATCH_TYPE	C1-TransferPaymentService/ matchType
6	MATCH_TYPE_VALUE	C1-TransferPaymentService/ matchTypeValue
7	SRC_SYSTEM	C1-TransferPaymentService/ sourceSystem
8	EXT_TXN_ID	C1-TransferPaymentService/ externalTransactionId
9	EXT_SRC_ID	C1-TransferPaymentService/ externalSourceId
10	TRANSFER_AMT	C1-TransferPaymentService/ transferAmount

9. Click **Save**.
The file request type is defined for mass payment transfer.

Uploading a Payment Transfer File

You can upload the mass payment transfer file in the CSV format through the **File Transformation and Upload (C1-FTRAN)** batch. While executing this batch, you need to specify a file request type using which you want to upload the payment transfer data from the CSV file in the respective fields. For more information about the batch, refer to *Oracle Revenue Management and Billing File Upload Interface Batch Execution Guide*.

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Once the CSV file is uploaded in the system, you can download the file or move the file to a different directory on the SFTP server using the **File Management System** screen. You can also view whether the CSV file records are successfully uploaded or not, whether an error occurred while uploading the file, and the header and footer details of the file using the **File Upload Dashboard** screen. In addition, if the CSV file records are successfully added in the system, you can view the status of the file records and their original and transformed payloads through the **File Record Details** screen. For more information about these screens, refer to *Oracle Revenue Management and Billing File Upload Interface User Guide*.

Transferring Payments

You can transfer multiple payments at once through the **File Request Processing (C1-FREQP)** batch. While executing this batch, you need to specify a file request type using which the payment transfer data is transformed in the XML format. For more information about the batch, refer to *Oracle Revenue Management and Billing File Upload Interface Batch Execution Guide*.

Once the CSV file record is successfully processed, the payment is transferred from one account to another. To view the details of the payment, you can navigate to the **Payment** screen through the **File Record Details** screen. For more information about the **File Record Details** screen, refer to *Oracle Revenue Management and Billing File Upload Interface User Guide*.

CSV File Format for Mass Payment Transfer

Before uploading a payment transfer file through the **File Upload Interface** utility, you need to ensure that the CSV file contains the following data:

Payment Event ID	Used to indicate the payment event whose frozen payments you want to transfer.	Yes (Conditional) **Note:** This data is required when you want to transfer all frozen payments of a particular payment event.
Payment ID	Used to indicate the payment that you want to transfer. **Note:** The system allows you to transfer a payment which is in the **Frozen** status.	Yes (Conditional) **Note:** This data is required when you want to transfer a particular payment.
Transfer Type	Used to indicate whether you want to transfer payments at the payment or payment event level. The valid values are: • **E** - Used when you want to transfer all frozen payments of a particular payment event. • **P** - Used when you want to transfer a particular payment.	Yes
Transfer Reason	Used to indicate the reason why you want to transfer the payment. **Note:** Here, you must specify the payment cancel reason where the **Payment Transfer** option is selected.	Yes
Match Type	Used to indicate the match type using which you want to transfer the payment.	Yes

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	Note: You must specify the match type which is already defined in the system.	
Match Value	Used to indicate the entity against which you want to transfer the payment. **Note:** Here, the entity can be account, bill, or contract. You must specify an entity which already exists in the system.	Yes
Source System	Used to indicate the external system from where the payment transfer data is received. **Note:** You must specify an external system which is already defined in the system.	No
External Transaction ID	Used to indicate the transaction in the external system through which the payment transfer data is received.	No
External Source System ID	Used to specify the external source system ID.	No
Transfer Amount	Used to specify the transfer amount.	Yes (Conditional)
	Note: Here, you must specify a positive value. The transfer amount should not be more than the payment amount or the sum of all frozen payments in the payment event.	**Note:** This data is required when you want to make a partial payment transfer.

Related Topics

For more information on...	See...
Sample CSV File for Mass Payment Transfer	Sample CSV File for Mass Payment Transfer on page 4003

Sample CSV File for Mass Payment Transfer

```
,436878000000,P,ROBL,HCMATCH,770018000000,,,,120
,436229000000,P,ENTR,HCMATCH,770018000000,,,,100
436560000000,,E,NSF,HCMATCH,770018000000,,,,180
,436912000000,P,ACCT,HCMATCH,770018000000,,,,200
```

Let us assume that the payment transfer file is uploaded and transformed using a file request type with the following field transformation details:

1	Payment Event ID	C1-TransferPaymentService/paymentEventId
2	Payment ID	C1-TransferPaymentService/paymentId
3	Transfer Type	C1-TransferPaymentService/transferType
4	Transfer Reason	C1-TransferPaymentService/transferReason

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5	Match Type	C1-TransferPaymentService/matchType
6	Match Type Value	C1-TransferPaymentService/matchTypeValue
7	Source System	C1-TransferPaymentService/sourceSystem
8	External Transaction Id	C1-TransferPaymentService/externalTransactionId
9	External Source system Id	C1-TransferPaymentService/externalSourceId
10	Transfer Amount	C1-TransferPaymentService/transferAmount

On successfully uploading and transforming the data, the system creates a transformed payload for each CSV file record. The transformed payload stores the payment transfer data in the following tags:

Service Payload		**CSV File Record 1**	**CSV File Record 2**	**CSV File Record 3**	**CSV File Record 4**
C1-Transfer Payment Service	paymentEventId	-	-	436560000000	-
	paymentId	436878000000	436229000000	-	436912000000
	transferType	P	P	E	P
	transferReason	ROBL	ENTR	NSF	ACCT
	matchType	HCMATCH	HCMATCH	HCMATCH	HCMATCH
	matchTypeValue	770018000000	770018000000	770018000000	770018000000
	sourceSystem	-	-	-	-
	externalTransactionId	-	-	-	-
	externalSourceId	-	-	-	-
	transferAmount	120	100	180	200

Related Topics

For more information on...	**See...**
CSV File Format for Mass Payment Transfer	CSV File Format for Mass Payment Transfer on page 4002

Chapter 53

Reporting

Topics:

- Report Creation Using Apache FOP Framework
- FOP Reports

Oracle Revenue Management and Billing provides best-in-class enterprise reporting feature which enables its customers to uncover new sights for taking faster and more informed business decisions. The reporting feature is a unique platform which easily integrates with the existing infrastructure and provides reusable design, data elements, and easy access to the application programming interface.

Oracle Revenue Management and Billing Reporting feature provides its customers the following benefits:

- Allows to generate and deliver customized reports to users in various departments and customers on time.
- Allows the implementers to efficiently create and update document templates.
- Supports output in the CSV, JSON, PDF, XML, and XLS formats using custom Formatting Objects Processor (FOP) templates.

Report Creation Using Apache FOP Framework

Oracle Revenue management and Billing allows you to create reports in the CSV, JSON, PDF, XML, and XLS formats using the Apache FOP (Formatting Objects Processor) framework. Apache FOP is an output arrangement which is driven by the XSL formatting object. It is a Java application that reads the XSL formatting object tree conforming to the XSL 1.1 Recommendation (05 December 2006) and then converts it into a document in the required output format. It allows you to preview the output directly on the screen.

To understand more about the framework, refer to the official Apache FOP site at https://xmlgraphics.apache.org/fop/ or you can also refer GitHub at https://github.com/apache/fop.

Prerequisites

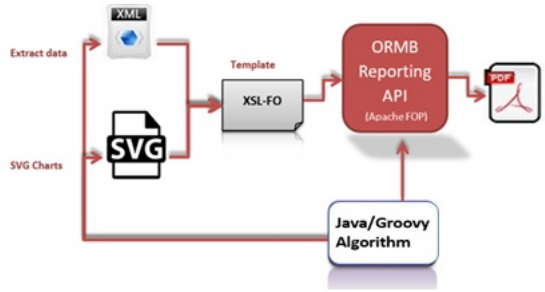
To use the Apache FOP reporting feature in ORMB, you should have:

- **C1-REPORTVW** feature configuration set in the application

PDF Generation Using Apache FOP

For generating a PDF from an XML file you need an XSLT stylesheet which converts the XML file to an XSL-FO file. The created XSL-FO file is also an XML file which contains all the formatted objects. The ORMB FOP reporting framework reads the XSL-FO file and formats it to a PDF document.

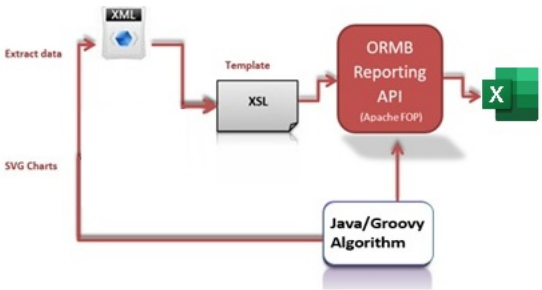
The process overview of PDF generation from an XML file is shown in the below image:



Excel (XLS) Generation Using XSL Tranformation

For generating an Excel (XLS) from an XML file you need an XSLT stylesheet which converts the XML file to an XSL file. The created XSL file is also an XML file which contains all the formatted objects. The ORMB reporting framework reads the XSL file and formats it to an Excel (XLS) document.

The process overview of Excel (XLS) generation from an XML file is shown in the below image:



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Sample XML Format for FOP Reporting

Using the below example, you can create an XML which contains name and a list of friends with contact numbers:

Sample XML Format for FOP Reporting

```
<?xml version="1.0" encoding="utf-8"?>
<root>
<name>Ryan</name>
<friend>
 <name>David</name>
 <phNo>+1.603.555.0100</phNo>
</friend>
<friend>
 <name>John</name>
 <phNo>+1.603.555.0101</phNo>
</friend>
</root>
```

Note: This is how an XML should be generated with encoded UTF-8 format.

Sample XSL Format for FOP Reporting

Using the below example, you can create an XSL format which renders the table that contains details of friends given in the above sample XML format:

Sample XSL Format for FOP Reporting

```
<?xml version="1.0" encoding="utf-8"?>
<xsl:stylesheet version="1.1"
 xmlns:xsl=http://www.w3.org/1999/XSL/Transform
  xmlns:fo="http://www.w3.org/1999/XSL/Format"
 exclude-result-prefixes="fo">
<xsl:template match="root">
<fo:root xmlns:fo="http://www.w3.org/1999/XSL/Format">
 <fo:layout-master-set>
  <fo:simple-page-master master-name="my-page">
   <fo:region-body margin="1in"/>
  </fo:simple-page-master>
 </fo:layout-master-set>
 <fo:page-sequence master-reference="my-page">
  <fo:flow flow-name="xsl-region-body">
   <fo:block>Hello, <xsl:value-of select="name" -/>!</fo:block>
   <fo:block>
    <fo:table>
     <fo:table-body>
      <fo:table-row>
       <fo:table-cell border="solid 1px black" text-align="center" font-
weight="bold">
        <fo:block>No.</fo:block>
       </fo:table-cell>
       <fo:table-cell border="solid 1px black" text-align="center" font-
weight="bold">
        <fo:block>Name</fo:block>
       </fo:table-cell>
       <fo:table-cell border="solid 1px black" text-align="center" font-
weight="bold">
        <fo:block>Phone Number</fo:block>
       </fo:table-cell>
      </fo:table-row>
```

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```
      <xsl:for-each select="./friend">
      <fo:table-row>
       <fo:table-cell border="solid 1px black" text-align="center">
        <fo:block>
         <xsl:value-of select="position()" -/>
        </fo:block>
       </fo:table-cell>
       <fo:table-cell border="solid 1px black" text-align="center">
        <fo:block>
         <xsl:value-of select="name" -/>
        </fo:block>
       </fo:table-cell>
       <fo:table-cell border="solid 1px black" text-align="center">
        <fo:block>
         <xsl:value-of select="phNo" -/>
        </fo:block>
       </fo:table-cell>
      </fo:table-row>
      </xsl:for-each>
     </fo:table-body>
    </fo:table>
   </fo:block>
  </fo:flow>
 </fo:page-sequence>
</fo:root>
</xsl:template>
</xsl:stylesheet>
```

Note: For more information on XSL Format, refer below links:

- https://www.netjstech.com/2015/07/how-to-create-pdf-from-xml-using-apache-fop.html.
- https://xmlgraphics.apache.org/fop/

Create XSL Template for an FOP Report

The XSL template is required to create an FOP report in the PDF of Excel (XLS) format. The XSL template converts the XML file into XSL-FO file. This XSL-FO is further read by the ORMB FOP reporting framework and formats the XSL-FO file into a PDF/Excel (XLS) file.

Note: For more information on XSL Format, refer below links:

- https://www.netjstech.com/2015/07/how-to-create-pdf-from-xml-using-apache-fop.html.
- https://xmlgraphics.apache.org/fop/

XSL Templates shipped with ORMB

The following XSL templates for the corresponding FOP reports are shipped with ORMB:

XSL Template	FOP Report
FOPAGEBPDF	AgingReport.xsl
FOPAGEOPDF	
FOPAGEHCBPDF	AgingReportHC.xsl
FOPAGEHCOPDF	

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XSL Template	FOP Report
FOPAGEHCBXLS	AgingReportHCExcel.xsl
FOPAGEHCOXLS	
RPT_LETTER	AutoPay_Letter.xsl
FOPAPAYHBPDF	AutoPayResponseReport.xsl
FOPAPAYHOPDF	
FOPAPAYHBXLS	AutoPayResponseReportExcel.xsl
FOPAPAYHOXLS	
PLSM_DETEXL	billExtract_Banking_Individual.xsl
PLSM_SMRYEXL	
FOPBIPAHBPDF	BinderPaymentReport.xsl
FOPBIPAHOPDF	
FOPBIPAHBXLS	BinderPaymentReportExcel.xsl
FOPBIPAHOXLS	
DCMR	Deal_Compare_Exl.xsl
DLDWLD	Deal_Extract_For_Upload.xsl
DEEEXCEL	Deal_Internal_Exl.xsl
DEIEXCEL	
DEIPDF	Deal_Internal_Version2.xsl
DLPRTEXLR	Deal_Profitability_Exl.xsl
DEEPDF	DealExtract_External_Type.xsl
FOPDDROPDF	DirectDebitRejection.xsl
EFPR_EXT_PDF	Effective_Pricing_Extract.xsl
EFPR_EXT_EXL	Effective_Pricing_Extract_Exl.xsl
REP_CODE2	ExpiringCreditCard_Letter.xsl
FOPASLHCBPDF	FOPAggregateStoplossHCReport.xsl
FOPASLHCOPDF	
FOPASLHCBXLS	FOPAggregateStoplossHCReportExcel.xsl
FOPASLHCOXLS	
FOPSSLHCBPDF	FOPSpecificStoplossHCReport.xsl
FOPSSLHCOPDF	
FOPSSLHCBXLS	FOPSpecificStoplossHCReportExcel.xsl
FOPSSLHCOXLS	
FOPHLDBXLS	HoldEntityDetailsReport.xsl
FOPHLDOXLS	

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XSL Template	FOP Report
FOPPADGHBPDF	PaymentDetailGroupHCReport.xsl
FOPPADGHOPDF	
FOPPADGHBXLS	PaymentDetailGroupHCReportExcel.xsl
FOPPADGHOXLS	
FOPPADIHBPDF	PaymentDetailHCReport.xsl
FOPPADIHOPDF	
FOPPADIHBXLS	PaymentDetailHCReportExcel.xsl
FOPPADIHOXLS	
FOPPAYDTBPDF	PaymentDetailReport.xsl
FOPPAYDTOPDF	
FOPPASGHBPDF	PaymentSummaryGroupHCReport.xsl
FOPPASGHOPDF	
FOPPASGHBXLS	PaymentSummaryGroupHCReportExcel.xsl
FOPPASGHOXLS	
FOPPASMHBPDF	PaymentSummaryHCReport.xsl
FOPPASMHOPDF	
FOPPASMHBXLS	PaymentSummaryHCReportExcel.xsl
FOPPASMHOXLS	
FOPPAYSMBPDF	PaymentSummaryReport.xsl
FOPPAYSMOPDF	
FOPWRORBPDF	RefundWriteOff.xsl
FOPWROROPDF	
FOPWRORBXLS	RefundWriteOffExcel.xsl
FOPWROROXLS	
FOPTODOOPDF	ToDoReport.xsl
FOPTODOBPDF	
FOPTODOOXLS	ToDoReportExcel.xsl
FOPTODOBXLS	
FOPTRDTBXLS	TransactionRejectionDetailExcel.xsl
FOPTRDTOXLS	
FOPTRSMBXLS	TransactionRejectionSummaryExcel.xsl
FOPTRSMOXLS	
FOPUSROPDF	UserAccessReport.xsl

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Create an Algorithm for an FOP Report

Before creating any new custom FOP report an algorithm is created which contains the following content:

- Query for the report
- XML formation code
- Input parameter validation
- Call to report generation algorithm

The algorithm is then associated with the FOP report while defining the FOP report in the application. When the FOP report is generated, the algorithm which is attached to the FOP report does the following:

- Extract data from the system in an XML file
- Present the extracted data in CSV, JSON, PDF, XML, or XLS format using the XSL file associated with the FOP report

The following algorithms for the corresponding FOP reports are shipped with ORMB:

FOP Report	**Report Generation Algorithm**
FOPADJBXLS	C1_FOPADJUST
FOPADJOXLS	
FOPAGEBPDF	C1_FOPAGING
FOPAGEOPDF	
FOPAGEHCBPDF	C1_FOPAGEHC
FOPAGEHCOPDF	
FOPAGEHCBXLS	C1_FOPAGEHC
FOPAGEHCOXLS	
FOPAPAYHBPDF	C1_FOPAPAY
FOPAPAYHOPDF	
FOPAPAYHBXLS	C1_FOPAPAY
FOPAPAYHOXLS	
PLSM_DETEXL	C1-PLDETXCL
PLSM_SMRYEXL	C1-PLSMEXCL
FOPBIPAHBPDF	C1_FOPBIPA
FOPBIPAHOPDF	
FOPBIPAHBXLS	C1_FOPBIPA
FOPBIPAHOXLS	
DCMR	C1-DLCMPRRPT
DLDWLD	C1-DLDWLD
DEEEXCEL	C1-DLEXTEXCL
DEIEXCEL	C1-DLINTEXCL
DEIPDF	C1-DLINTPDF

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FOP Report	Report Generation Algorithm
DLPRTEXLR	C1-DLPRTEXLR
DEEPDF	C1-DLEXTPDF
FOPDDROPDF	C1_FOPDEBIT
EFPR_EXT_PDF	C1-EFFPRPDF
EFPR_EXT_EXL	C1-EFFPREXL
FOPASLHCBPDF	C1_FOPASLHC
FOPASLHCOPDF	
FOPASLHCBXLS	C1_FOPASLHC
FOPASLHCOXLS	
FOPSSLHCBPDF	C1_FOPSSLHC
FOPSSLHCOPDF	
FOPSSLHCBXLS	C1_FOPSSLHC
FOPSSLHCOXLS	
FOPHLDBXLS	C1_FOPHOLD
FOPHLDOXLS	
FOPPADGHBPDF	C1_FOPPADTGH
FOPPADGHOPDF	
FOPPADGHBXLS	C1_FOPPADTGH
FOPPADGHOXLS	
FOPPADIHBPDF	C1_FOPPAYHDT
FOPPADIHOPDF	
FOPPADIHBXLS	C1_FOPPAYHDT
FOPPADIHOXLS	
FOPPAYDTBPDF	C1_FOPPAY
FOPPAYDTOPDF	
FOPPASGHBPDF	C1_FOPPAHGSM
FOPPASGHOPDF	
FOPPASGHBXLS	C1_FOPPAHGSM
FOPPASGHOXLS	
FOPPASMHBPDF	C1_FOPPAYHSM
FOPPASMHOPDF	
FOPPASMHBXLS	C1_FOPPAYHSM
FOPPASMHOXLS	
FOPPAYSMBPDF	C1_FOPPAY

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FOP Report	Report Generation Algorithm
FOPPAYSMOPDF	
FOPWRORBPDF	C1_FOPRWO
FOPWROROPDF	
FOPWRORBXLS	C1_FOPRWO
FOPWROROXLS	
FOPTODOOPDF	C1_FOPTODO
FOPTODOBPDF	
FOPTODOOXLS	C1_FOPTODO
FOPTODOBXLS	
FOPTRDTBXLS	C1_FOPTXNREG
FOPTRDTOXLS	
FOPTRSMBXLS	C1_FOPTXNREG
FOPTRSMOXLS	C1_FOPTXNREG
FOPUSROPDF	C1_FOPUSER

Creating a Message for an FOP Report

Prerequisite

To create a message for an FOP report you should have:

- Error message added in the MessageRepository.java file. For example:

```
public static ServerMessage searchByIsNull()
{
MessageRepository repo = MessageRepository.getInstance();
MessageParameters messageParms = new MessageParameters();
return repo.getMessage(SEARCH_BY_IS_NULL, messageParms);
}
```

- Error code added in the ReportingMessage.java file. For example:

```
public static final int SEARCH_BY_IS_NULL = 2039;
```

Procedure

To create a message for an FOP report:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **M** and then click **Message**.
   A sub-menu appears
3. Click the **Add** option from the **Message** sub-menu.
   The Select Business Object screen appears. It contains the following field:

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Field Name	Field Description	Mandatory (Yes or No)
Message Business Object	Used to indicate that you want to create a message for a business object.	Yes

4. Select **Message** from the **Message Business Object** list.
5. Click **OK**.
   The **Message** screen appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Message Category	Used to indicate the category for which you want to create a message. The valid value is: • Reports	Yes
Message Number	Used to specify the error code which you have added in the **ReportingMessage.java** file.	Yes
Message Text	Used to specify the error message.	Yes
Detailed Description	Used to specify additional information about the message.	No

6. Click **Save**.
   The message is created.

Calling the ORMB FOP Reporting API

Procedure

To call the ORMB FOP reporting API:

1. You should use the ORMB provided business component to call the below reporting API which generates the FOP reports:
   com.splwg.ccb.domain.reportsubmission.FOPReportGenerationComponent_Impl
2. Call the reporting API method in the below format:

   public String generateReport(String xslTemplateFileName, String xmlContent, String outputFileName)

   The parameters for the reporting API method is defined as below:

Parameter Name	Parameter Description
xslTemplateFileName	Used to pass the XSL-FO/XSL file name. It is given in the below format: `<name of report>.xsl`
xmlContent	Used to pass the XML content generated by the algorithm.
outputFileName	Used to pass the PDF/Excel (XLS) file name that you want to generated. It is given in the below format: `<name_of_report>.pdf/xls`

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Setting Master Configuration for Email Notification

Procedure

Email notification is configured for FOP reports which are generated in the batch mode. To set master configuration for email notification:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **M** and then click **Master Configuration**.
   The **Master Configuration** screen appears.
3. Search for **Reporting Email Sender Configuration** in the **Master Configuration List** zone.
4. Click the **Add** (+) icon in the **Action** column corresponding to **Reporting Email Sender Configuration**.

   The **Master Configuration** screen appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Master Configuration	Displays the master configuration	Not Applicable
SMTP Host Name	Used to specify the SMTP application to send and receive emails.	Yes
SMTP Port	Used to specify the communication endpoint to transfer email data over SMTP through a network, from one server to another. The valid value is: • 25	Yes
Username	Used to specify the username of the user.	Yes
Password	Used to specify the password for the user.	Yes
Secure Sockets Layer	Used to indicate whether you want to transfer the email data securely across a network.	No
Test	Used to configure the sender's and receiver's email ID.	Yes
From Email Address	Used to specify the user's email ID. **Note:** This field appears only when you select the check box corresponding to the **Test** field.	Yes
To Recipient Email ID	Used to specify the receiver's email ID. **Note:** This field appears only when you select the check box corresponding to the **Test** field.	Yes

5. Enter the required details in the **Master Configuration** screen.
6. Click **Save**.
   The master configuration for email notification is set.

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Creating a Custom Algorithm for FOP Reports

Prerequisite

To create a custom algorithm for FOP reports you should have:

- The **ReportDataExtractAlgorithmSpot** algorithm spot defined in the application

Procedure

To create a custom algorithm for FOP reports:

1. Log into **Eclipse**.
2. In the navigation pane, right click on the **C1** folder.
   A list appears.
3. From the list, select **New** and then click **Others**.

   The **Select a Wizard** window appears. It contains the following field:

Field Name	Field Description	Mandatory (Yes or No)
Wizard	Used to filter the **Algorithm Implementation** wizard.	No

Note: You can also navigate to the **Algorithm Implementation** wizard in the **Oracle Utilities** section through the navigation window provided below the **Wizard** field.

4. Select **Algorithm Implementation** from the navigation window.
5. Click **Next**.
   The **New Algorithm Implementation** window appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Source Folder	Displays the source from where the algorithm spot is called. The valid value is: `C1/Java`	Not Applicable
Package	Used to specify the directory in the source folder where you want the algorithm to appear. The valid value is: `com.splwg.ccb.domain.reportsubmission.custom`	Yes
Name	Used to specify the algorithm that you want to create.	Yes
Soft Parameters	Used to specify parameters for the algorithm.	No
Algorithm Spot Interface	Used to specify the algorithm spot used to create custom data extract in the PDF or XLS format. The valid value is: `com.splwg.ccb.domain.reportsubmission.ReportDataExtractAlgorithmSpot` **Note:** You can also extract data in the XML, CSV, or JSON formats by calling the CommonUtil_Impl API while generating the respective report.	Yes

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6. Click **Finish**.
   The custom algorithm for FOP report is created.

Configuring the Custom Algorithm from the User Interface

Prerequisites

To configure the custom algorithm from the user interface you should:

- Define custom algorithm JAVA code
- Generate artifacts, do Web Build and start the WebLogic server to bring the ORMB application up and running

Procedure

To configure the custom algorithm from the user interface you should:

- Create an algorithm type and associate it with the custom algorithm java code
- Create an algorithm and associate it with the algorithm type

1. To create an algorithm type, click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **A** and then click **Algorithm Type**.
   A sub-menu appears
3. Click the **Add** option from the **Algorithm Type** sub-menu.
   The **Algorithm Type** screen appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Algorithm Type	Used to specify the algorithm type that you want to create in the system.	Yes
Description	Used to specify the description for the algorithm type.	Yes
Detailed Description	Used to specify additional information about the algorithm type	No
Algorithm Entity	Used to indicate the algorithm entity for which you want to create the algorithm type. The valid value is: • Report-Data Extract Algorithm	Yes
Program Type	Used to indicate the program code using which the custom algorithm is created. The valid value is: • JAVA	Yes
Program Name	Used to specify the custom algorithm java code. The valid value is: `com.splwg.ccb.domain.reportsubmission.ReportDataExtractAlgorithmSpot`	Yes

In addition, the **Algorithm Type** screen contains the following fields in a grid:

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Field Name	Field Description	Mandatory (Yes or No)
Sequence	Used to specify the sequence in which the parameter is considered for the algorithm type.	No
Parameter	Used to specify the parameter using which you want to create the algorithm type.	No
Required	Used to indicate whether the parameter is required or not.	No
Owner	Indicates the user who associated the parameter with the algorithm type.	No

4. Enter the required details in the **Algorithm Type** screen.
5. Click **Save**.
   The algorithm type is saved.
6. To create an algorithm, click the **Admin** link in the **Application** toolbar.
   A list appears.
7. From the **Admin** menu, select **A** and then click **Algorithm**.
   A sub-menu appears
8. Click the **Add** option from the **Algorithm** sub-menu.
   The **Algorithm** screen appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Algorithm Code	Used to specify the algorithm that you want to create in the system	Yes
Description	Used to specify the description for the algorithm.	Yes
Algorithm Type	Used to specify the algorithm type to which you want to associate the algorithm.	Yes
Algorithm Type Description	Displays the description of the algorithm type.	Not Applicable
Parameter	Displays the parameter of the algorithm.	Not Applicable
Effective Date	Displays the date from when the algorithm type is effective for the algorithm.	Not Applicable

9. Enter the required details in the **Algorithm** screen.
10. Click **Save**.
    The custom algorithm is configured in the user interface.

Reporting Template Upload

Information will be available shortly!

Report Creation

The **Report Creation** screen allows you to define reports for extracting data of a person and/or its accounts using the Apache FOP framework. It also enables you to view, edit, or delete an existing report. It contains the following zone:

Report Search on page 4019

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Report Search

The **Report Search** zone allows you to search for an existing FOP report using various search criteria. It contains the following two sections:

- **Search Criteria** - The **Search Criteria** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Report	Used to search for a particular FOP report.	No
Description	Used to search FOP reports with a particular description.	No

Note: You must specify at least one search criterion while searching for an FOP report.

- **Search Results** - On clicking the **Search** button, the search results appear based on the specified search criteria. The **Search Results** section contains the following columns:

Column Name	Column Description
Report	Displays the FOP report.
Description	Displays the description of the FOP report.
Output Format	Indicates the format in which the FOP report is extracted from the system. **Note:** At present, you can extract an FOP report in PDF, CSV, and XML formats.
Report Type	Indicates the type of information which is extracted using the FOP report. The valid values are: • Bill • Custom • Letter
View	On clicking the **View** button you can view the details of the FOP report.
Edit	On clicking the **Edit** (✎) icon, the **Report Creation** screen appears where you can edit the details of the FOP report.
Delete	On clicking the **Delete** (🗑) icon, you can delete the FOP report.

Note: Pagination is used to display limited number of records in the **Search Results** section. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

Related Topics

For more information on...	See...
How to search for an FOP report	Searching for an FOP Report on page 4020
How to view the details of an FOP report	Viewing the FOP Report Details on page 4027
How to define an FOP report	Defining an FOP Report on page 4020
How to edit an FOP report	Editing an FOP Report on page 4023
How to delete an FOP report	Deleting an FOP Report on page 4026

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Searching for an FOP Report

Procedure

To search for an FOP report:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **R** and then click **Report Creation**.
   The **Report Creation** screen appears.
3. Enter the search criteria in the **Report Search** zone.

> **Note:** ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.

4. Click **Search**.
   A list of FOP reports that meet the search criteria appears in the **Search Results** section.

Related Topics

For more information on...	See...
Report Creation screen	Report Creation on page 4018
Report Search zone	Report Search on page 4019

Defining an FOP Report

Prerequisites

To define an FOP report you should have:

- FOP reporting framework configured in the system
- **C1_FOPONBL** algorithm defined in the system to create FOP reports for bill templates
- Parameters defined for the **C1_FOPONBL** algorithm
- **C1_FOPONBL** algorithm attached to the **Online Bill Display** system event
- **C1_ FOPLTRALG** algorithm defined in the system to create FOP reports for letter templates
- Parameters defined for the **C1_ FOPLTRALG** algorithm
- **C1_ FOPLTRALG** algorithm attached to the **Online Letter Image** system event
- Algorithms defined in the application for creating custom FOP reports

Procedure

To define an FOP report:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **R** and then click **Report Creation**.
   The **Report Creation** screen appears.
3. Click the **Add** button available at the upper right corner of the **Report Creation** screen.

   The **Report Creation** screen appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Report	Used to specify the FOP report	No

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Field Name	Field Description	Mandatory (Yes or No)
Description	Used to specify the description for the FOP report	No
Output Format	Used to indicate the format in which you want to generate the FOP report. The valid values are: • CSV • DOCX • JSON • PDF • Web • XLS • XML **Note:** At present, the system supports extraction of an FOP report in the CSV, JSON, PDF, XML, and XLS formats. You can customize the algorithm to support the extraction of an FOP report in the DOCX and Web formats.	Yes
Script	Used to indicate the script using which the FOP report is extracted in the Web format. **Note:** This field is enabled only when you select the **Web** option from the **Output Format** list.	No
Report Type	Used to indicate the type of information that you want to extract using the FOP report. The valid values are: • Bill • Custom • Letter **Note:** This field is disabled when you select the **Web** option from the **Output Format** list.	Yes
Report Template	Used to indicate the template using which the FOP report is uploaded in the system. **Note:** This field appears only when you select the **Bill** or **Letter** option from the **Report Type** list.	Yes
XSL Template	Used to indicate the XSL template file using which you want to create the FOP report.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The **Upload** button appears corresponding to the **XSL Template** field. On clicking the **Upload** button, the **Upload XSL Template** window appears where you can choose the required XSL template. This field is disabled when you select the **Web** option from the **Output Format** list.	
Report Generation Algorithm	Used to indicate the algorithm defined for creating a custom FOP report. **Note:** The **Search** (🔍) icon appears corresponding to the **Report Generation Algorithm** field. On clicking the **Search** icon, the **Algorithm Code/Description** window appears where you can search for the required algorithm. This field is enabled only when you select the **Custom** option from the **Report Type** list.	Yes (Conditional) **Note:** This field is required while creating a custom FOP report.
Reporting Mode	Used to indicate whether you want to generate the FOP report in the batch mode or online mode. The valid values are: • Batch • Online	Yes
Email ID	Used to specify the email ID where you want to send the notification of the FOP report generation. **Note:** This field is enabled only when you select the **Batch** option from the **Reporting Mode** list.	Yes (Conditional) **Note:** The field is required for generating FOP report in the batch mode.
Subject	Used to specify the text which you want to appear in the subject line of the email. **Note:** This field is enabled only when you select the **Batch** option from the **Reporting Mode** list.	Yes (Conditional) **Note:** The field is required for generating FOP report in the batch mode.
Email Body Content	Used to specify the content which you want to appear in the email body,	Yes (Conditional) **Note:** The field is required for generating FOP report in the batch mode.

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Field Name	Field Description	Mandatory (Yes or No)
	Note: This field is enabled only when you select the **Batch** option from the **Reporting Mode** list.	

In addition, the **Report Creation** screen contains the following columns:

Column Name	Column Description	Mandatory (Yes or No)
Display Sequence	Used to indicate the sequence of the parameter.	No
Report Parameter	Used to indicate the parameter which you want to define while generating the FOP report.	No
	Note: The **Search** (🔍) icon appears corresponding to the **Report Parameter** field. On clicking the **Search** icon, the **Field Details** window appears where you can search for the required parameter. On specifying the parameter, the description of the parameter appears corresponding to the **Report Parameter** field.	

Note: The above columns do not appear when you select the **Web** option from the **Output Format** list.

4. Enter the required details in the **Report Creation** screen.
5. Click **Save**.
   The FOP report is defined.

Related Topics

For more information on...	See...
Report Creation screen	Report Creation on page 4018

Editing an FOP Report

Prerequisites

To edit an FOP report you should have:

- FOP report (whose details you want to edit) defined in the application
- Algorithms defined in the application for creating custom FOP reports

Procedure

To edit an FOP report:

1. Search for the FOP report in the **Report Search** zone of the **Report Creation** screen.
2. In the **Search Results** section, click the **Edit** (✎) icon in the **Edit** column corresponding to the FOP report whose details you want to edit.

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The **Report Creation** screen appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Report	Used to specify the FOP report	Not Applicable
Description	Used to specify the description for the FOP report	No
Output Format	Used to indicate the format in which you want to generate the FOP report. The valid values are: • CSV • DOCX • JSON • PDF • Web • XLS • XML **Note:** At present, the system supports extraction of an FOP report in the CSV, JSON, PDF, XML, and XLS formats. You can customize the algorithm to support the extraction of an FOP report in the DOCX and Web formats.	Yes
Script	Used to indicate the script using which the FOP report is extracted in the Web format. **Note:** This field is enabled only when you select the **Web** option from the **Output Format** list.	No
Report Type	Used to indicate the type of information that you want to extract using the FOP report. The valid values are: • Bill • Custom • Letter **Note:** This field is disabled when you select the **Web** option from the **Output Format** list.	Yes
Report Template	Used to indicate the template using which the FOP report is uploaded in the system. **Note:** This field appears only when you select the **Bill** or **Letter** option from the **Report Type** list.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
XSL Template	Used to indicate the XSL template file using which you want to create the FOP report. **Note:** The **Upload** button appears corresponding to the **XSL Template** field. On clicking the **Upload** button, the **Upload XSL Template** window appears where you can choose the required XSL template. This field is disabled when you select the **Web** option from the **Output Format** list.	Yes
Report Generation Algorithm	Used to indicate the algorithm defined for creating a custom FOP report. **Note:** The **Search** (🔍) icon appears corresponding to the **Report Generation Algorithm** field. On clicking the **Search** icon, the **Algorithm Code/Description** window appears where you can search for the required algorithm. This field is enabled only when you select the **Custom** option from the **Report Type** list.	Yes (Conditional) **Note:** This field is required while creating a custom FOP report.
Reporting Mode	Used to indicate whether you want to generate the FOP report in the batch mode or online mode. The valid values are: • Batch • Online	Yes
Email ID	Used to specify the email ID where you want to send the notification of the FOP report generation. **Note:** This field is enabled only when you select the **Batch** option from the **Reporting Mode** list.	Yes (Conditional) **Note:** The field is required for generating FOP report in the batch mode.
Subject	Used to specify the text which you want to appear in the subject line of the email. **Note:** This field is enabled only when you select the **Batch** option from the **Reporting Mode** list.	Yes (Conditional) **Note:** The field is required for generating FOP report in the batch mode.
Email Body Content	Used to specify the content which you want to appear in the email body,	Yes (Conditional)

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Field Name	Field Description	Mandatory (Yes or No)
	Note: This field is enabled only when you select the **Batch** option from the **Reporting Mode** list.	**Note:** The field is required for generating FOP report in the batch mode.

In addition, the **Report Creation** screen contains the following columns:

Column Name	Column Description	Mandatory (Yes or No)
Display Sequence	Used to indicate the sequence of the parameter.	No
Report Parameter	Used to indicate the parameter which you want to define while generating the FOP report.	No
	Note: The **Search** (🔍) icon appears corresponding to the **Report Parameter** field. On clicking the **Search** icon, the **Field Details** window appears where you can search for the required parameter. On specifying the parameter, the description of the parameter appears corresponding to the **Report Parameter** field.	

Note: The above columns do not appear when you select the **Web** option from the **Output Format** list.

3. Modify the required details in the **Report Creation** screen.
4. Click **Save**.
   The changes made to the FOP report are saved.

Related Topics

For more information on...	See...
How to search for an FOP report	Searching for an FOP Report on page 4020
Report Search zone	Report Search on page 4019
Report Creation screen	Report Creation on page 4018

Deleting an FOP Report

Procedure

To delete an FOP report:

1. Search for the FOP report in the **Report Search** zone of the **Report Creation** screen.
2. In the **Search Results** section, click the **Delete** (🗑) icon in the **Delete** column corresponding to the FOP report that you want to delete.
   A message appears confirming whether you want to delete the FOP report from the system.
3. Click **OK**.

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4. The FOP report is deleted.

Related Topics

For more information on...	See...
How to search for an FOP report	Searching for an FOP Report on page 4020
Report Search zone	Report Search on page 4019
Report Creation screen	Report Creation on page 4018

Viewing the FOP Report Details

Prerequisites

To view the FOP report details you should have:

- FOP report (whose details you want to view) defined in the system

Procedure

To view the FOP report details:

1. Search for the FOP report in the **Report Search** zone of the **Report Creation** screen.
2. In the **Search Results** section, click the **View** button in the **View** column corresponding to the FOP report whose details you want to view.
   The **Report Details** screen appears.
3. View the details of the FOP report in the **Report Details** screen.

Related Topics

For more information on...	See...
How to search for an FOP report	Searching for an FOP Report on page 4020
Report Search zone	Report Search on page 4019
Report Creation screen	Report Creation on page 4018

Report Audit

The **Report Audit** screen allows you to track the records of the generated FOP reports in the system. It also allows you to do the following:

- Download the FOP reports which are generated successfully in the system
- View the error message of the FOP report which did not generate successfully

The **Report Audit** screen contains the following zone:

Report Generation List on page 4027

Related Topics

For more information on...	See...
How to downloading an FOP Report	Downloading an FOP Report on page 4028

Report Generation List

The **Report Generation List** zone allows you to view a list of FOP reports which are generated in the system. It contains the following columns:

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Column Name	Column Description
Sequence	Displays the sequence of the generated FOP report.
Report ID	Displays the unique identification number which is created automatically by the system for a particular FOP report during report generation process.
Report	Displays the FOP report which is generated in the system.
Created By	Displays the user who has generated the FOP report in the system.
Creation Date Time	Displays the date and time when the FOP report is generated in the system.
Generation Successful	Indicates whether the FOP report generation is successful or not. The valid values are: • No • Yes
Message Text	Displays information about the FOP report generation.
	Note: If the FOP report generation is successful, then, this column displays the following message: **Report Generation Success** However, if the FOP report generation is not successful, then, this column displays the reason why the FOP reports is not generated successfully in the system.
Download Report	On clicking the **Download** link, you can download the FOP report.
	Note: The **Download** link does not appear for FOP reports which are not generated successfully in the system.

Downloading an FOP Report

Prerequisites

To download an FOP report you should have:

- FOP reports generated successfully in the system

Procedure

To download an FOP report:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **R** and then click **Report Audit**.
   The **Report Audit** screen appears.
3. Ensure that the **Report Generation List** zone is expanded in the **Report Audit** screen.
4. Click the **Filters** (▽) icon available at the upper right corner of the **Report Generation List** zone.
   The **Report** field appears below the report list.
5. Specify the FOP report which you want to download in the **Report** field.

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6. Click **Search**.
   The specified FOP report is filtered in the **Report Generation List** zone.
7. Click the **Download** link in the **Download** column corresponding to the FOP report that you want to download.
   The FOP report is downloaded.

Related Topics

For more information on...	See...
Report Audit screen	Report Audit on page 4027
Report Generation List zone	Report Generation List on page 4027

Report Generation

The **Report Generation** screen allows you to extract the details of an FOP report.

Generating an FOP Report

Prerequisites

To generate an FOP report you should have:

- FOP reports created in the system

Procedure

To generate an FOP report:

1. Click the **Menu** link in the **Application** toolbar.
   A list appears.
2. From the **Main** menu, select **Reports** and then click **Report Generation**.

   The **Report Generation** screen appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Report	Used to indicate the FOP report that you want to generate.	Yes
Description	Displays the description of the FOP report	Not Applicable

   In addition, the **Report Generation** screen contains the following columns:

Column Name	Column Description
Display Sequence	Displays the sequence in which the parameter is defined for the FOP report.
Report Parameter	Displays the parameter which is defined for the FOP report.
Report Parameter Value	Used to specify the value of the parameter for generating the FOP report.

3. Select the required FOP report from the **Report** list.
4. Specify the values of the parameters defined for the FOP report in the **Report Parameter** Value column.
5. Click **Generate**.
   The FOP report is generated.

Related Topics

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For more information on...	See...
Report Generation screen	Report Generation on page 4029

FOP Reports

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

- Adjustment Detail Report on page 4030
- Aggregate Stop-Loss Report on page 4030
- Entity Hold Detail Report on page 4031
- Invoice Aging Report on page 4031
- Payment Detail Report for Fully-Insured Individual Business on page 4032
- Payment Detail Report for Self-funded and Fully-Insured Group Business on page 4032
- Payment Summary Report for Fully-Insured Individual Business on page 4033
- Payment Summary Report for Self-funded and Fully-Insured Group Business on page 4033
- Specific Stop-Loss Report on page 4033
- To Do Report on page 4034
- User Access Report on page 4034
- Automatic Payment Response Report on page 4034
- Binder Payment Report on page 4035
- Quick Response Code Generation on page 4035

For more information about these FOP reports, refer to *Oracle Revenue Management and Billing FOP Reports Guide*

Adjustment Detail Report

The **Adjustment Detail** report enables you to view the adjustments which are created for persons or accounts, or which are created against bills. While generating the adjustment detail report, you can specify the following parameters - Start Date, End Date, Division, Entity Type, and Entity ID. The start date is mandatory. If you do not specify the end date, the system by default sets it to the system date. For example, if you specify the start date as 01-01-2022 and entity type as Account, the system will extract all adjustments which are created for the accounts from 01-01-2022 till the current date.

You can generate the adjustment detail report from the user interface or through a batch process in the Excel format. We have shipped the following adjustment detail reports in this release:

- **FOPADJBXLS** - Used when you want to generate the adjustment detail report through the **C1-RPTGN** batch in the Excel format.
- **FOPADJOXLS** - Used when you want to generate the adjustment detail report from the user interface in the Excel format.

Aggregate Stop-Loss Report

The **Aggregate Stop-Loss** report enables you to view the aggregate stop-loss which is billed to a parent customer. At a time, it enables you to view the aggregate stop-loss information of a particular parent customer which belongs to a particular division. While generating the aggregate stop-loss report, you can specify the following parameters - Division, Parent Customer, Claim Billed Through, Policy Start Date, and Policy End Date. The division and parent customer are mandatory. If you specify the claim billed until date, you need to specify the policy start and end dates. For example, if you specify 04-01-2021 in the **Claim Billed Through** parameter, 01-01-2021 in the **Policy Start Date** parameter, and 12-31-2021 in the **Policy End Date** parameter, the system fetches the aggregate stop-loss charges which are billed to the parent customer between 01-01-2022 to 04-01-2022.

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This report can be used for the self-funded business. You can generate the aggregate stop-loss report from the user interface or through a batch process in either PDF or Excel format. We have shipped the following aggregate stop-loss reports in this release:

- **FOPASLHCBPDF** - Used when you want to generate the aggregate stop-loss report through the **C1-RPTGN** batch in the PDF format.
- **FOPASLHCBXLS** - Used when you want to generate the aggregate stop-loss report through the **C1-RPTGN** batch in the Excel format.
- **FOPASLHCOPDF** - Used when you want to generate the aggregate stop-loss report from the user interface in the PDF format.
- **FOPASLHCOXLS** - Used when you want to generate the aggregate stop-loss report from the user interface in the Excel format.

Entity Hold Detail Report

The **Entity Hold Detail** report enables you to view the entities, such as persons, accounts, or bills for which the business processes, such as bill generation, automatic payment, funding, overdue, or refund, are on hold for a given period. While generating the entity hold detail report, you can specify the following parameters - Start Date, End Date, Division, Hold Entity, Entity ID, Hold Process, and Hold Status. The start date is mandatory. If you do not specify the end date, the system by default sets it to the system date. For example, if you specify the start date as 01-01-2021 and hold entity as Bill, the system will extract all hold requests which are created for the bills from 01-01-2021 till the current date.

You can generate the entity hold detail report from the user interface or through a batch process in the Excel format. We have shipped the following entity hold detail reports in this release:

- **FOPHLDBXLS** - Used when you want to generate the entity hold detail report through the **C1-RPTGN** batch in the Excel format.
- **FOPHLDOXLS** - Used when you want to generate the entity hold detail report from the user interface in the Excel format.

Invoice Aging Report

The **Invoice Aging** report enables you to view the invoices which are due for payment in different age buckets. At a time, it enables you to view the invoice aging data of all customers which belong to a particular division. While generating the invoice aging report, you can specify the following parameters - Start Date, End Date, Division, and Customer Class. The start date and division are mandatory. If you do not specify the end date, the system by default sets it to the system date. While generating the invoice aging report, the system does the currency conversion when the accounts' invoice currency is different from the customer's division currency.

This report can be used for the self-funded, fully-insured group, and fully-insured individual business. In case of the self-funded and fully-insured group business, the aging data is grouped at the bill group and parent customer levels. However, in case of the fully-insured individual business, the aging data is grouped at the individual customer level.

You can generate the invoice aging report from the user interface or through a batch process in either PDF or Excel format. We have shipped the following invoice aging reports in this release:

- **FOPAGEHCBPDF** - Used when you want to generate the invoice aging report through the **C1-RPTGN** batch in the PDF format.
- **FOPAGEHCBXLS** - Used when you want to generate the invoice aging report through the **C1-RPTGN** batch in the Excel format.
- **FOPAGEHCOPDF** - Used when you want to generate the invoice aging report from the user interface in the PDF format.
- **FOPAGEHCOXLS** - Used when you want to generate the invoice aging report from the user interface in the Excel format.

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Payment Detail Report for Fully-Insured Individual Business

The **Payment Detail** report for fully-insured individual business enables you to view the payment details of each account. At a time, it enables you to view the payments of all accounts which belong to a particular division. While generating the payment detail report for the fully-insured individual business, you can specify the following parameters - Division, Start Date, End Date, Person Identifier Type, Person Identifier, Account Identifier Type, Account Identifier, Payment Status, Payment Amount Range, Health Plan ID, and Customer Class. The division and start date are mandatory. If you do not specify the end date, the system by default sets it to the system date. While filtering the data using the payment amount range, you need to specify the lower and upper range value separated by the hyphen (-) symbol. For example, if you set the start date to 01-01-2021, division to D10, and payment amount range to 150-200, the system will extract all payments which are created from 01-01-2021 till the current date, whose payment amount is between 150 and 200, and which are created for the accounts belonging to the D10 division. The payments are shown in the payment currency.

You can generate the payment detail report from the user interface or through a batch process in either PDF or Excel format. We have shipped the following payment detail reports for the fully-insured individual business in this release:

- **FOPPADTHBPDF** - Used when you want to generate the payment detail report through the **C1-RPTGN** batch in the PDF format.
- **FOPPADTHBXLS** - Used when you want to generate the payment detail report through the **C1-RPTGN** batch in the Excel format.
- **FOPPADTHOPDF** - Used when you want to generate the payment detail report from the user interface in the PDF format.
- **FOPPADTHOXLS** - Used when you want to generate the payment detail report from the user interface in the Excel format.

Payment Detail Report for Self-funded and Fully-Insured Group Business

The **Payment Detail** report for self-funded and fully-insured group business enables you to view the payment details of each account. At a time, it enables you to view the payments of all accounts which belong to a particular division. While generating the payment detail report for the self-funded or fully-insured group business, you can specify the following parameters - Division, Start Date, End Date, Person Identifier Type, Person Identifier, Account Identifier Type, Account Identifier, Payment Status, Payment Amount Range, and Customer Class. The division and start date are mandatory. If you do not specify the end date, the system by default sets it to the system date. While filtering the data using the payment amount range, you need to specify the lower and upper range value separated by the hyphen (-) symbol.

For example, if you set the start date to 01-01-2020, division to D1, and payment amount range to 50-100, the system will extract all payments which are created from 01-01-2020 till the current date, whose payment amount is between 50 and 100, and which are created for the accounts belonging to the D1 division. The payments are shown in the payment currency.

You can generate the payment detail report from the user interface or through a batch process in either PDF or Excel format. We have shipped the following payment detail reports for the self-funded and fully-insured group business in this release:

- **FOPPADGHBPDF** - Used when you want to generate the payment detail report through the **C1-RPTGN** batch in the PDF format.
- **FOPPADGHBXLS** - Used when you want to generate the payment detail report through the **C1-RPTGN** batch in the Excel format.
- **FOPPADGHOPDF** - Used when you want to generate the payment detail report from the user interface in the PDF format.
- **FOPPADGHOXLS** - Used when you want to generate the payment detail report from the user interface in the Excel format.

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Payment Summary Report for Fully-Insured Individual Business

The **Payment Summary** report for fully-insured individual business enables you to view the total payment made for each account. At a time, it enables you to view the total payment of each account which belongs to a particular division. While generating the payment summary report for the fully-insured individual business, you can specify the following parameters - Division, Start Date, End Date, Person Identifier Type, Person Identifier, Account Identifier Type, Account Identifier, Health Plan ID, and Customer Class. The division and start date are mandatory. If you do not specify the end date, the system by default sets it to the system date. The payment total is shown in the customer's division currency. While generating the payment summary report, the system does the currency conversion when the payment currency is different from the customer's division currency.

You can generate the payment summary report from the user interface or through a batch process in either PDF or Excel format. We have shipped the following payment summary reports for the fully-insured individual business in this release:

- **FOPPASMHBPDF** - Used when you want to generate the payment summary report through the **C1-RPTGN** batch in the PDF format.
- **FOPPASMHBXLS** - Used when you want to generate the payment summary report through the **C1-RPTGN** batch in the Excel format.
- **FOPPASMHOPDF** - Used when you want to generate the payment summary report from the user interface in the PDF format.
- **FOPPASMHOXLS** - Used when you want to generate the payment summary report from the user interface in the Excel format.

Payment Summary Report for Self-funded and Fully-Insured Group Business

The **Payment Summary** report for self-funded and fully-insured group business enables you to view the total payment made for each account. At a time, it enables you to view the total payment of each account which belongs to a particular division. While generating the payment summary report for the self-funded or fully-insured group business, you can specify the following parameters - Division, Start Date, End Date, Person Identifier Type, Person Identifier, Account Identifier Type, Account Identifier, and Customer Class. The division and start date are mandatory. If you do not specify the end date, the system by default sets it to the system date. The payment total is shown in the customer's division currency. While generating the payment summary report, the system does the currency conversion when the payment currency is different from the customer's division currency.

You can generate the payment summary report from the user interface or through a batch process in either PDF or Excel format. We have shipped the following payment summary reports for the self-funded and fully-insured group business in this release:

- **FOPPASGHBPDF** - Used when you want to generate the payment summary report through the **C1-RPTGN** batch in the PDF format.
- **FOPPASGHBXLS** - Used when you want to generate the payment summary report through the **C1-RPTGN** batch in the Excel format.
- **FOPPASGHOPDF** - Used when you want to generate the payment summary report from the user interface in the PDF format.
- **FOPPASGHOXLS** - Used when you want to generate the payment summary report from the user interface in the Excel format.

Specific Stop-Loss Report

The **Specific Stop-Loss** report enables you to view the specific stop-loss which is billed for each member to a bill group. At a time, it enables you to view the specific stop-loss information of a particular parent customer which belongs to a particular division. While generating the specific stop-loss report, you can specify the following parameters - Division, Parent Customer, Claim Billed Through, Policy Start Date, and Policy End Date. The division and parent customer are

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mandatory. If you specify the claim billed until date, you need to specify the policy start and end dates. For example, if you specify 03-01-2022 in the **Claim Billed Through** parameter, 01-01-2022 in the **Policy Start Date** parameter, and 12-31-2022 in the **Policy End Date** parameter, the system fetches the specific stop-loss charges which are billed to different bill groups of the parent customer between 01-01-2022 to 03-01-2022.

This report can be used for the self-funded business. You can generate the specific stop-loss report from the user interface or through a batch process in either PDF or Excel format. We have shipped the following specific stop-loss reports in this release:

- **FOPSSLHCBPDF** - Used when you want to generate the specific stop-loss report through the **C1-RPTGN** batch in the PDF format.
- **FOPSSLHCBXLS** - Used when you want to generate the specific stop-loss report through the **C1-RPTGN** batch in the Excel format.
- **FOPSSLHCOPDF** - Used when you want to generate the specific stop-loss report from the user interface in the PDF format.
- **FOPSSLHCOXLS** - Used when you want to generate the specific stop-loss report from the user interface in the Excel format.

To Do Report

The **To Do** report enables you to view the notifications (i.e. To Dos) assigned to a user and its current status. While generating the To Do report, you can specify the following parameters - Start Date, End Date, To Do Type, To Do Type Description, Assigned User, Created By, Status, Operator, and To Do Age. The start date is mandatory. If you do not specify the end date, the system by default sets it to the system date. For example, if you specify the start date as 06-01-2022 and To Do type as C1-ACCL, the system will extract all To Dos which are created using the C1-ACCL To Do type from 06-01-2022 till the current date. While filtering the data using the To Do age, you need to specify the operator along with the To Do age. The system supports the following operators: Greater Than (>), Less Than (<), Less Than Equal To (<=), Greater Than Equal To (>=), and Equal To (=). For example, if you specify the start date as 06-01-2022, To Do age as 50, and operator as >, the system will extract all To Dos which are open in the system since more than 50 days.

You can generate the To Do report from the user interface or through a batch process in the PDF format. We have shipped the following To Do reports in this release:

- **FOPTODOBPDF** - Used when you want to generate the To Do report through the **C1-RPTGN** batch in the PDF format.
- **FOPTODOOPDF** - Used when you want to generate the To Do report from the user interface in the PDF format.

User Access Report

The **User Access** report enables you to view the permissions granted to different users for accessing the data. While generating the user access report, you can specify the following parameters - User Group, User Group Description, To Do Role, and To Do Role Description.

You can generate the user access report from the user interface in the PDF format. We have shipped the following user access report in this release:

- **FOPUSROPDF** - Used when you want to generate the user access report from the user interface in the PDF format.

Automatic Payment Response Report

Oracle Revenue Management and Billing enables you to extract the response received for automatic payment clearing records from the auto clearing house along with the current payment status through an FOP report. While generating the automatic payment response report, you can specify the following parameters - Search By, Start Date, End Date, Division, Customer Class, Person Name, Person Identifier Type, Person Identifier, Account Identifier Type, Account

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Identifier, and Automatic Payment Response. The **Search By** filter enables you to extract the automatic payment clearing records either using the following values:

- **AUTOPAY_EXTRACTION_DATE** - If you set the **Search By** parameter to **AUTOPAY_EXTRACTION_DATE**, the system considers the automatic payment clearing records whose extract date falls within the start and end dates.
- **UPLOAD_DATE** - If you set the **Search By** parameter to **UPLOAD_DATE**, the system considers the automatic payment clearing records whose response from the auto clearing house is uploaded within the start and end dates.

The **Search By**, **Start Date**, and **Division** are mandatory. If you do not specify the end date, the system by default sets it to the system date. You can generate the automatic payment response report from the user interface or through a batch process in either PDF or Excel format. We have shipped the following automatic payment response reports in this release:

- **FOPAPAYHBPDF** - Used when you want to generate the automatic payment response report through the **C1-RPTGN** batch in the PDF format.
- **FOPAPAYHBXLS** - Used when you want to generate the automatic payment response report through the **C1-RPTGN** batch in the Excel format.
- **FOPAPAYHOPDF** - Used when you want to generate the automatic payment response report from the user interface in the PDF format.
- **FOPAPAYHOXLS** - Used when you want to generate the automatic payment response report from the user interface in the Excel format.

Binder Payment Report

Oracle Revenue Management and Billing enables you to extract the binder payments through an FOP report. While generating the binder payment report, you can specify the following parameters - Start Date, End Date, Division, Customer Class, Person Name, Exchange Subscriber Identifier Type, Exchange Subscriber Identifier, Membership Status, and Binder Payment Status.

The **Start Date**, **End Date**, and **Division** are mandatory. You can generate the binder payment report from the user interface or through a batch process in either PDF or Excel format. We have shipped the following binder payment reports in this release:

- **FOPBIPAHOPDF** - Used when you want to generate the binder payment report through the **C1-RPTGN** batch in the PDF format.
- **FOPBIPAHOXLS** - Used when you want to generate the binder payment report through the **C1-RPTGN** batch in the Excel format.
- **FOPBIPAHBPDF** - Used when you want to generate the binder payment report from the user interface in the PDF format.
- **FOPBIPAHBXLS** - Used when you want to generate the binder payment report from the user interface in the Excel format.

Quick Response Code Generation

A Quick Response (QR) code is a type of matrix barcode (or two-dimensional barcode). A barcode is a machine-readable optical label that can contain information about the item to which it is attached. Oracle Revenue Management and Billing provides a QR code generator using which you can generate a QR code. At the moment, the QR code is only supported for the FOP reports which are generated in the PDF format. You can define dataset for the QR string using which you want to generate the QR code. You can insert a QR code on any page in the Portable Document Format (PDF) file.

To insert a QR code in an FOP report, you need to add QR related code snippets in the respective XSL file. Only then, the system will insert the QR code when you generate the FOP report in the PDF format.

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Chapter 54

Automatic Refund/Write Off

Topics:

- Refund/Write Off Business Rules
- Automatic Refund/Write Off on Terminating a Group Policy or Individual Membership
- Rollback Automatic Refund/Write Off on Reinstating a Group Policy or Individual Membership
- Automatic Refund/Write Off Preference
- Refund/Write Off Instruction

Oracle Revenue Management and Billing enables you to create an automatic refund/write off instruction for an account when a fully-insured group policy or individual membership is terminated. It also enables you to rollback an automatic refund/write off for an account when the fully-insured group policy or individual membership is reinstated. For more information, refer to the respective sections in this chapter.

Refund/Write Off Business Rules

Oracle Revenue Management and Billing enables you to define business rules to initiate automatic refund and write off. The refund/write off business rules are used while creating automatic refund/write off request for accounts when the fully insured group policy or individual membership is terminated.

While terminating a fully insured group policy or individual membership, the system derives the refund/write off business rule for the fully insured group policy or individual membership, respectively. While deriving the refund/write off business rule, the system considers the business rules with the **Refund/Write Off Business Rule** category that are effective on the termination date. Note that the system considers only those effective business rules which are in the **Active** status. The system then executes the criteria of each effective business rule and considers the business rule that meet the criteria. If two or more business rules meet the criteria, the system considers the business rule with the highest priority. The system then stamps the refund/write off business rule against the fully insured group policy or individual membership in the **C1_ENT_BUS_RULE** table.

While defining criteria for a refund/write off business rule, you can use parameters that are defined on the following source entities:

- Membership
- Membership Person
- Health Plan
- Health Product
- Policy
- Account

You can define, edit, and delete a refund/write off business rule through the **Business Rule** screen. While defining a refund/write off business rule, you need to set the category to **Refund/Write Off Business Rule**. The refund/write off business rule enables you to define the following parameters:

- **Refund Threshold Amount** - Used to specify the threshold amount for refund. If the account balance is greater than or equal to the refund threshold amount, the system creates automatic refund for an account.
- **Defer Refund (in Days)** - Used to specify the number of days till when you want to defer automatic refund for an account. It is used to calculate the automatic refund request creation date.
- **Write Off Threshold Amount** - Used to specify the threshold amount for write off. If the account balance is less than or equal to the write off threshold amount, the system creates automatic write off for an account.
- **Defer Write Off (in Days)** - Used to specify the number of days till when you want to defer automatic write off for an account. It is used to calculate the automatic write off request creation date.

You can use the same criteria in multiple business rules to derive different set of refund/write off parameters but with different effective date. You can view the refund/write off business rules through the **Business Rule** screen.

Automatic Refund/Write Off on Terminating a Group Policy or Individual Membership

On terminating a fully-insured group policy or individual membership, the system derives the refund/write off business rule for the fully-insured group policy or individual membership and stamps it against the policy or membership ID in the **C1_ENT_BUS_RULE** table.

If the fully-insured group policy is defined for a parent customer, the system derives all accounts of the parent customer and its bill groups and then creates an automatic refund/write off instruction for each account of the parent customer and its bill groups. However, if the fully-insured group policy is defined for a bill group, the system derives all accounts of the bill group and then creates an automatic refund/write off instruction for each account of the bill group. While deriving the parent customer and bill group of the fully-insured group policy, the system considers the **Parent Person Type** and **Bill Group Person Type** option types of the **C1-PERSTYPE** feature configuration. However, in case of individual

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membership, the system derives all accounts of the financially responsible person and then creates an automatic refund/write off instruction for each account of the financially responsible person.

Note:

The system does not create a new automatic refund/write off instruction for an account when an automatic refund/write off instruction already exists for the account in the **Pending**, **Valid**, **Error**, or **Pending Completion** status.

If you want to create automatic refund/write off instruction for an account on terminating a fully-insured group policy, you need to ensure that the **C1-POTR-INS** algorithm is attached to the **Terminated** status of the **C1-POLICY** business object.

If you want to create automatic refund/write off instruction for an account on terminating an individual membership, you need to ensure that the **C1-IMTR-INS** algorithm is attached to the **Terminated** status of the **C1-IndMembership** business object.

The system calculates the wait date using the wait days specified in the **C1-POTR-INS** or **C1-IMTR-INS** algorithm, respectively. In case of a fully-insured group policy, the wait days is added to the policy end date to derive the wait date. However, in case of an individual membership, the wait days is added to the membership end date to derive the wait date. The wait date is later used to calculate the automatic refund/write off request creation date. A new screen named **Refund/Write off Instruction** is introduced in this release. It enables you to view the automatic refund/write off instructions of an account which are created on terminating a fully-insured group policy or individual membership. On creating an automatic refund/write off instruction, the status of the automatic refund/write off instruction is set to **Pending**. The following two batches are introduced in this release:

- Identify Refund/Write Off Eligibility (C1-RFWO1) on page 4039
- Automatic Creation of Refund/Write Off (C1-RFWO2) on page 4040

On voiding a refund request created through an automatic refund instruction, the system cancels the transfer adjustments and refund adjustment on the netting contract of the account. And, on canceling a write off request created through an automatic write off instruction, the system cancels the transfer adjustments and write off adjustment on the netting contract of the account.

Identify Refund/Write Off Eligibility (C1-RFWO1)

The **Identify Refund/Write Off Eligibility (C1-RFWO1)** batch is used to check whether there are any automatic refund/write off instructions in the **Pending** status. If there is an automatic refund/write off instruction in the **Pending** status, the system derives the business rule stamped against the fully-insured group policy or individual membership for which the automatic refund/write off instruction is created. If the business rule is not found for the fully-insured group policy or individual membership in the **C1_ENT_BUS_RULE** table, the system changes the status of the automatic refund/write off instruction to **Invalid**. In addition, the automatic refund/write off instruction reason is set to **INBR** (Business Rule Could not be Derived). However, if the business rule is found for the fully-insured group policy or individual membership in the **C1_ENT_BUS_RULE** table, the system derives the account balance. If the account balance is zero, the system changes the status of the automatic refund/write off instruction to **Invalid**. In addition, the automatic refund/write off instruction reason is set to **INZR** (Account Balance Is Zero).

If the account balance is greater than zero but less than the refund threshold amount, the system changes the status of the automatic refund instruction to **Invalid**. In addition, the automatic refund instruction reason is set to **INTH** (Account Balance Doesn't Meet Threshold Limit). However, if the account balance is greater than zero and greater than or equal to the refund threshold amount, the system does the following:

- Changes the status of the automatic refund instruction to **Valid**.
- Derives the refund request type from the automatic refund/write off field mapping which is specified in the **C1_REFWO** feature configuration.
- Calculates the automatic refund request creation date using the wait date (calculated earlier using the wait days) and defer refund days specified in the business rule.

If the account balance is less than zero but greater than the write off threshold amount, the system changes the status of the automatic write off instruction to **Invalid**. In addition, the automatic write off instruction reason is set to **INTH**

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(Account Balance Doesn't Meet Threshold Limit). However, if the account balance is less than zero and less than or equal to the write off threshold amount, the system does the following:

- Changes the status of the automatic write off instruction to **Valid**.
- Derives the write off request type from the automatic refund/write off field mapping which is specified in the **C1_REFWO** feature configuration.
- Calculates the automatic write off request creation date using the wait date (calculated earlier using the wait days) and defer write off days specified in the business rule.

Note: If the system is used for both the fully-insured group and fully-insured individual line of business, you need to define two separate field mappings of the **Automatic Refund/Write-Off** preference category - one for each line of business (i.e. fully-insured group business and fully-insured individual business). Once you define the field mapping for each line of business, you need to set them against the **Field Mapping Preference for Individual Membership** and **Field Mapping Preference for Policy (Small Group)** option types, respectively, in the **C1_REFWO** feature configuration.

If the netting contract type is not specified in the refund/write off request type, the system changes the status of the automatic refund/write off instruction to **Invalid**. In addition, the automatic refund/write off instruction reason is set to **NCTM** (Netting Contract Type Missing).

Automatic Creation of Refund/Write Off (C1-RFWO2)

The **Automatic Creation of Refund/Write Off (C1-RFWO2)** batch is used to check whether there are any automatic refund/write off instructions in the **Valid**, **Pending Completion**, or **Error** status. If there is an automatic refund/write off instruction in the **Valid** or **Error** status and if the refund/write off request creation date in the automatic refund/write off instruction is earlier than or equal to the batch business date, the system verifies the account balance. Note that the automatic refund/write off instruction in the **Error** status are considered only when the **Select records in Error (Y/ N)** parameter in the batch is set to **Y**. If the current account balance does not match the account balance retrieved in the **C1-RFWO1** batch, the system cancels the automatic refund/write off instruction. The status of the automatic refund/write off instruction is changed to **Canceled** and the automatic refund/write off instruction reason is set to the reason code which is specified in the **Instruction Cancel Reason on Account Balance Change** attribute of the automatic refund/write off field mapping.

If the current account balance matches the account balance retrieved in the **C1-RFWO1** batch, the system creates the refund/write off request using the refund/write off request type (which is specified in the automatic refund/write off field mapping). While creating the refund/write off request, the adjustment level is set to **Account**. If the approval process is not configured on the refund/write off request type, the refund/write off request is created and processed immediately. On processing a refund/write off request, the system does the following:

- Creates transfer adjustments against the unmatched financial transactions of the account on the netting contract
- Creates one refund/write off adjustment against the netting contract
- Changes the status of the refund/write off request to **Processed**
- Changes the status of the automatic refund/write off instruction to **Completed**

If the approval process is configured on the refund/write off request type, the refund/write off request is created in the **Approval in Progress** status. The status of the automatic refund/write off instruction is then changed to **Pending Completion**.

Note: An approver can approve or reject the refund/write off request from the user interface. If the approver approves the refund/write off request, the system creates transfer adjustments against the unmatched financial transactions of the account on the netting contract and creates one refund/write off adjustment against the netting contract. Finally, the status of the refund/write off request is changed to **Processed**. However, if the approver rejects the refund/write off request, the system sets the automatic refund/write off instruction reason to the reason code which is specified in the **Instruction Cancel Reason on Rejecting Request** attribute of the automatic refund/write off field mapping.

In addition, if the refund process is on hold for the account, the refund request is created in the **Hold** status. The status of the automatic refund instruction is then changed to **Pending Completion**.

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If an error occurs while creating a refund/write off request, the system does the following:

- Changes the status of the automatic refund/write off instruction to **Error**
- Sets the automatic refund/write off instruction reason to the reason code which is specified in the **Error Code on Processing Refund/Write Off Request** attribute of the automatic refund/write off field mapping.
- Creates a To Do using the **C1-ATRFWO** To Do type for the automatic refund/write off instruction

If there is an automatic refund/write off instruction in the **Pending Completion** status and if the refund/write off request creation date in the automatic refund/write off instruction is earlier than or equal to the batch business date, the system checks whether the status of the corresponding refund/write off request is **Processed**. If so, the system changes the status of the automatic refund/write off instruction to **Completed**.

Rollback Automatic Refund/Write Off on Reinstating a Group Policy or Individual Membership

If a terminated fully-insured group policy or individual membership is reinstated, the system checks whether an automatic refund/write off instruction exists for the policy or membership. If an automatic refund/write off instruction exists for the policy or membership, the system behaves in the following manner:

Refund/Write Off Request Exists (Y or N)	**Automatic Refund/Write Off Instruction Status**	**System Behavior**
N	Pending or Valid	The system does the following: • Changes the status of the automatic refund/write off instruction to **Canceled** • Sets the automatic refund/write off instruction reason to the reason code which is specified in the **Instruction Cancel Reason on Reinstatement** attribute of the automatic refund/write off field mapping.

Y	Pending Completion	The system does the following:
		• Changes the status of the automatic refund/write off instruction to **Canceled**
		• Sets the automatic refund/write off instruction reason to the reason code which is specified in the **Instruction Cancel Reason on Reinstatement** attribute of the automatic refund/write off field mapping.
		• If the refund/write off request is in the **Processed** or **Approval in Progress** status, then
		  • The appropriate log entry is added to the refund/write off request.
		  • The status of the refund/write off request is changed to **Rejected**.
		  • The automatic refund/write off instruction reason is set to the reason code which is specified in the **Refund Request Reject Reason on Reinstatement** or **Write Off Request Reject Reason on Reinstatement** attribute of the automatic refund/write off field mapping, respectively.
		• If the refund request is in the **Hold** status, then

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Refund/Write Off Request Exists (Y or N)	Automatic Refund/Write Off Instruction Status	System Behavior
		• The appropriate log entry is added to the refund request. • The status of the refund request is changed to **Voided**. • The automatic refund instruction reason is set to the reason code which is specified in the **Void Status Reason for Refund Request on Reinstatement** attribute of the automatic refund/write off field mapping.

Y	Completed	The system does the following:
		• If the write off request is in the **Processed** status, then
		  • The appropriate log entry is added to the write off request.
		  • The status of the write off request is changed to **Canceled**.
		  • The status of the automatic write off instruction is changed to **Canceled**
		  • The automatic write off instruction reason is set to the reason code which is specified in the **Instruction Cancel Reason on Reinstatement** attribute of the automatic refund/write off field mapping.
		• If the refund request is in the **Processed** status, then no action is taken against the refund request and automatic refund instruction.

Automatic Refund/Write Off Preference

The Automatic Refund/Write Off Preference enables you to set attributes that are used during:

- **Automatic Refund/Write Off Creation on Policy or Individual Membership Termination** - While creating an automatic refund/write off for the account on terminating a fully insured group policy or individual membership, the system uses the following attributes from the automatic refund/write off preference:
  - Instruction Cancel Reason on Account Balance Change
  - Instruction Cancel Reason on Rejecting Request
  - Refund Request Type
  - Write Off Request Type
  - Error Code on Processing Refund/Write Off Request
- **Rollback Automatic Refund/Write Off on Policy or Individual Membership Reinstatement** - While rolling back the automatic refund/write off instructions on reinstating a fully insured group policy or individual membership, the system uses the following attributes from the automatic refund/write off preference:
  - Instruction Cancel Reason on Reinstatement
  - Refund Request Reject Reason on Reinstatement
  - Write Off Request Reject Reason on Reinstatement
  - Void Status Reason for Refund Request on Reinstatement
  - Cancel Status Reason for Write Off Request on Reinstatement

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For more information about the attributes, see Defining an Automatic Refund/Write Off Preference on page 4044. You can create an automatic refund/write off preference using the **C1-FieldMapping** business object through the **Field Mapping** screen. While creating an automatic refund/write off preference, you must set the preference category to **Automatic Refund/ Write-Off**. You can also edit, delete, and copy an automatic refund/write off preference through the **Field Mapping** screen.

This feature is tested and certified only for the fully insured group and individual lines of health insurance business. If the system is used for both the fully insured group and individual lines of business, you need to define two separate preferences with the **Automatic Refund/Write-Off** preference category – one for each line of business (i.e., fully insured group business and fully insured individual business). Once you define the preference for each line of business, you need to set them against the **Field Mapping Preference for Individual Membership** and **Field Mapping Preference for Policy (Small Group)** option types, respectively, in the **C1_REFWO** feature configuration.

Searching for an Automatic Refund/Write Off Preference

Procedure

To search for an automatic refund/write off preference:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **F** and then click **Field Mapping**.
   A sub-menu appears.
3. Click the **Search** option from the **Field Mapping** sub-menu.
   The **Field Mapping** screen appears.
4. Select the **Automatic Refund/Write Off** option from the **Preference Category** list.
5. Enter the additional search criteria in the **Search Field Mapping** zone.

> **Note:** ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.

6. Click **Search**.
   A list of automatic refund/write off preferences that meet the search criteria appears in the **Search Results** section.

Viewing the Automatic Refund/Write Off Preference Details

Procedure

To view the details of an automatic refund/write off preference:

1. Search for the automatic refund/write off preference in the **Field Mapping** screen.
2. In the **Search Results** section, click the **Broadcast** (ᯤ) icon corresponding to the automatic refund/write off preference whose details you want to view.
   The **Field Mapping** zone appears.
3. View the details of the automatic refund/write off preference in the **Field Mapping** zone.

Related Topics

For more information on...	See...
How to search for an automatic refund/write off preference	Searching for an Automatic Refund/Write Off Preference on page 4043

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Defining an Automatic Refund/Write Off Preference

Prerequisites

To define an automatic refund/write off preference, you should have:

- Field mapping business objects defined in the application
- Values defined in the **REFWO_INST_RSN_CD_FLG** lookup field
- Required refund request types and write off request types defined in the application
- Required reasons defined for the **Deferred Cancel** status of the **C1-WORequest** business object in the **Status Reason** screen
- Required reasons defined for the **Deferred Void** status of the **C1-RefundReq** business object in the **Status Reason** screen

Procedure

To define an automatic refund/write off preference:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **F** and then click **Field Mapping**.
   A sub-menu appears.
3. Click the **Add** option from the **Field Mapping** sub-menu.

   The **Select Business Object** screen appears. It contains the following field:

Field Name	Field Description	Mandatory (Yes or No)

Field Mapping Business Object	Used to indicate the business object using which you want to create an automatic refund/write off preference. The valid values are:
	• **Bill Route Method - Contact Method Mapping (i.e., C1_BillRouteCntMethMap)** - Enables you to maintain a routing method - contact method mapping preference.
	• **Field Mapping (i.e., C1-FieldMapping)** - Enables you to maintain the following:
	  • Automatic Refund/Write-Off Preference
	  • Billing Preference
	  • Binder Payment Preference
	  • Configuration for Match Type - Handling Overpayment Preference
	  • Delinquency Process Preference
	  • Delinquency Process Type Preference
	  • Geographic Rating Area Preference
	  • Individual Membership Preference
	  • Medicare Preference
	  • Member Reconciliation Preference
	  • Member Relationship and Subscription Tier Preference
	  • Membership Repricing Reasons Preference
	  • Statement Construct Preference
	  • Transaction Paid Status Count Preference
	  • Hold Request Preference
		Yes

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Field Name	Field Description	Mandatory (Yes or No)
	• **Group Membership Status Reason Mapping (i.e., C1-MemStatusReasonMapGroup)** - Enables you to maintain a group membership status reason preference. • **Medicare Plan Benefit Package (i.e., C1-BenefitPackage)** - Enables you to maintain a medicare plan benefit package. • **Membership Status Reason Mapping (i.e., C1-MemStatusReasonMapping)** - Enables you to maintain an individual membership status reason preference. **Note:** The above business objects are shipped with the product. The list includes those business objects which are created using the **Field Mapping** (i.e., **C1-FIELDMAP**) maintenance object.	

Note: Alternatively, you can access the **Select Business Object** screen by clicking the **Add** button in the **Page Title** area of the **Field Mapping** screen.

4. Select the **Field Mapping** option from the **Field Mapping Business Object** list.
5. Click **OK**.

The **Field Mapping** screen appears. It contains the following sections:

- **Main** - Used to specify basic details for the automatic refund/write off preference. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Preference	Used to specify the automatic refund/write off preference.	Yes
Description	Used to specify the description for the automatic refund/write off preference.	Yes
Detailed Description	Used to specify additional information about the automatic refund/write off preference. **Note:** You can resize the text box depending on your requirement by clicking the **Resize Handle** (⇲) icon at the bottom right corner of the text box.	No
Status	Used to indicate the status of the automatic refund/write off preference. The valid values are: • Active • Inactive	Yes

- **Preference Category** - Used to specify the preference category. It contains the following field:

Field Name	Field Description	Mandatory (Yes or No)
Preference Category	Used to indicate the category to which the preference belongs. The valid values are: • Automatic Refund/Write-Off • Billing	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	• Binder Payment • Configuration for Match Type - Handling Overpayment • Delinquency Process • Delinquency Process Type • Geographic Rating Area • Hold Request • Individual Membership • Medicare • Medicare Plan Benefit • Member Reconciliation • Member Relationship and Subscription Tier • Membership Repricing Reasons • Membership Status Reason • Routing Method - Contact Method Mapping • Statement Construct • Transaction Paid Status Count	
	Note: The list includes only those values which are defined in the **FIELD_CAT_FLG** lookup field. You must select **Automatic Refund/Write Off** option from the list while creating an automatic refund/write off preference.	

- **Preference Settings** - Used to set the attributes in the automatic refund/write off preference. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Attribute	Used to indicate the attribute that you want to set in the automatic refund/write off preference. **Note:** The attribute list appears only when the preference category is selected from the respective list.	Yes
Value	Used to specify the attribute value. **Note:** The attribute value list appears only when the attribute is selected from the respective list. The attribute value list varies depending on the attribute that you want to set in the automatic refund/write off preference.	Yes
Entity Type	Used to indicate the type of entity for which the attribute is applicable. The valid values are: • Account • Adjustment	No

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Field Name	Field Description	Mandatory (Yes or No)
	• Billable Charge • Membership • Payment • Policy **Note:** At present, this data is stored for informational purposes only and is not considered in the business logic. If required, you can add more entity types to the **MAP_ENTITY_FLG** lookup field.	

The following table lists and describes the attributes available while defining, editing, or copying the automatic refund/write off preference:

Attribute Name	Description	Mandatory (Yes or No)
Cancel Status Reason for Write Off Request on Reinstatement	Used to indicate the reason why you want to the cancel a write off request created via an automatic write off instruction. The system uses this status reason when the following conditions are met: • The respective terminated fully insured group policy or individual membership is reinstated or when the write off request created via an automatic write off instruction is canceled from the user interface. • The automatic write off instruction is in the **Completed** status and the write off request is in the **Processed** status. **Note:** Here, you must specify a status reason which is already defined for the **Deferred Cancel** status of the **C1-WORequest** business object.	Yes
Error Code on Processing Refund/ Write Off Request	Used to indicate the reason why you want to the cancel an automatic refund/write off instruction. The system uses this status reason when an error occurs while creating a refund/write off request for an automatic refund/write off instruction. **Note:** The list includes only those status reasons which are defined in the **REFWO_INST_RSN_CD_FLG** lookup field.	Yes
Instruction Cancel Reason on Account Balance Change	Used to indicate the reason why you want to the cancel an automatic refund/write off instruction. The system uses this status reason when the current account balance does not match the account balance retrieved through the **C1-RFWO1** batch. **Note:** The list includes only those status reasons which are defined in the **REFWO_INST_RSN_CD_FLG** lookup field.	Yes
Instruction Cancel Reason on Reinstatement	Used to indicate the reason why you want to the cancel an automatic refund/write off instruction. The system uses this status reason when the following conditions are met: • The respective terminated fully insured group policy or individual membership is reinstated.	Yes

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Attribute Name	Description	Mandatory (Yes or No)
	• The automatic refund/write off instruction is in the **Pending**, **Valid**, **Pending Completion**, or **Completed** status. **Note:** The list includes only those status reasons which are defined in the **REFWO_INST_RSN_CD_FLG** lookup field.	
Instruction Cancel Reason on Rejecting Request	Used to indicate the reason why you want to the cancel an automatic refund/write off instruction. The system uses this status reason when the approver rejects the refund/write off request created via an automatic refund/write off instruction. **Note:** The list includes only those status reasons which are defined in the **REFWO_INST_RSN_CD_FLG** lookup field.	Yes
Refund Request Type	Used to indicate the refund request type using which you want to create a refund request for an automatic refund instruction. The system considers this refund request type when the account balance is greater than zero and greater than or equal to the refund threshold amount (specified in the refund/write off business rule). **Note:** The list includes only those refund/write off request types which are in the **Active** status.	Yes
Refund Request Reject Reason on Reinstatement	Used to indicate the reason why you want to the reject a refund request created via an automatic refund instruction. The system uses this status reason when the following conditions are met: • The respective terminated fully insured group policy or individual membership is reinstated. • The automatic refund instruction is in the **Pending Completion** status and the refund request is in the **Approval in Progress** status. **Note:** The list includes only those status reasons which are defined in the **REFWO_INST_RSN_CD_FLG** lookup field.	Yes
Void Status Reason for Refund Request on Reinstatement	Used to indicate the reason why you want to the void a refund request created via an automatic refund instruction. The system uses this status reason when the following conditions are met: • The respective terminated fully insured group policy or individual membership is reinstated or when the refund request created via an automatic refund instruction is voided from the user interface. • The automatic refund instruction is in the **Pending Completion** status and the refund request is in the **Hold** status. OR The automatic refund instruction is in the **Completed** status and the refund request is in the **Processed** status.	Yes

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Attribute Name	Description	Mandatory (Yes or No)
	Note: Here, you must specify a status reason which is already defined for the **Deferred Void** status of the **C1-RefundReq** business object.	
Write Off Request Type	Used to indicate the write off request type using which you want to create a write off request for an automatic write off instruction. The system considers this write off request type when the account balance is less than zero and less than or equal to the write off threshold amount (specified in the refund/write off business rule). **Note:** The list includes only those refund/write off request types which are in the **Active** status.	Yes
Write Off Request Reject Reason on Reinstatement	Used to indicate the reason why you want to the cancel a write off request created via an automatic write off instruction. The system uses this status reason when the following conditions are met: • The respective terminated fully insured group policy or individual membership is reinstated. • The automatic write off instruction is in the **Pending Completion** status and the write off request is in the **Approval in Progress** status. **Note:** The list includes only those status reasons which are defined in the **REFWO_INST_RSN_CD_FLG** lookup field.	Yes

Note: While defining an automatic refund/write off preference, you must set at least one attribute in the automatic refund/write off preference.

6. Select the **Automatic Refund/Write Off** option from the **Preference Category** list.
   The **Preference Category** section disappears and the **Preference Category** field appears in the **Main** section.
7. Enter the required details in the **Main** section.
8. Set the required attributes in the automatic refund/write off preference.
9. If you want to set more than one attribute in the automatic refund/write off preference, click the **Add** (+) icon and then repeat step 8.

Note: However, if you want to remove an attribute from the automatic refund/write off preference, click the **Delete** (🗑) icon corresponding to the attribute.

10. Click **Save**.
    The automatic refund/write off preference is defined.

Editing an Automatic Refund/Write Off Preference

Prerequisites

To edit an automatic refund/write off preference, you should have:

- Values defined in the **REFWO_INST_RSN_CD_FLG** lookup field.

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- Required refund request types and write off request types defined in the application.
- Required reasons defined for the **Deferred Cancel** status of the **C1-WORequest** business object in the **Status Reason** screen.
- Required reasons defined for the **Deferred Void** status of the **C1-RefundReq** business object in the **Status Reason** screen.

Procedure

To edit an automatic refund/write off preference:

1. Search for the automatic refund/write off preference in the **Field Mapping** screen.
2. In the **Search Results** section, click the **Edit** (✎) icon in the **Edit** column *c*orresponding to the automatic refund/write off preference whose details you want to edit.

   The **Field Mapping** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details for the automatic refund/write off preference. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Preference	Displays the automatic refund/write off preference.	Not applicable
Description	Used to specify the description for the automatic refund/write off preference.	Yes
Detailed Description	Used to specify additional information about the automatic refund/write off preference. **Note:** You can resize the text box depending on your requirement by clicking the **Resize Handle** (⇲) icon at the bottom right corner of the text box.	No
Status	Used to indicate the status of the automatic refund/write off preference. The valid values are: • Active • Inactive	Yes
Preference Category	Indicates the category to which the preference belongs. The valid value is: • Automatic Refund/Write Off	Not applicable

   - **Preference Settings** - Used to set the attributes in the automatic refund/write off preference. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Attribute	Used to indicate the attribute that you want to set in the automatic refund/write off preference.	Yes
Value	Used to specify the attribute value.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The attribute value list appears only when the attribute is selected from the respective list. The attribute value list varies depending on the attribute that you want to set in the automatic refund/write off preference.	
Entity Type	Used to indicate the type of entity for which the attribute is applicable. The valid values are: • Account • Adjustment • Billable Charge • Membership • Payment • Policy **Note:** At present, this data is stored for informational purposes only and is not considered in the business logic. If required, you can add more entity types in the **MAP_ENTITY_FLG** lookup field.	No

The following table lists and describes the attributes available while defining, editing, or copying the automatic refund/write off preference:

Attribute Name	Description	Mandatory (Yes or No)
Cancel Status Reason for Write Off Request on Reinstatement	Used to indicate the reason why you want to the cancel a write off request created via an automatic write off instruction. The system uses this status reason when the following conditions are met: • The respective terminated fully insured group policy or individual membership is reinstated or when the write off request created via an automatic write off instruction is canceled from the user interface. • The automatic write off instruction is in the **Completed** status and the write off request is in the **Processed** status. **Note:** Here, you must specify a status reason which is already defined for the **Deferred Cancel** status of the **C1-WORequest** business object.	Yes
Error Code on Processing Refund/ Write Off Request	Used to indicate the reason why you want to the cancel an automatic refund/write off instruction. The system uses this status reason when an error occurs while creating a refund/write off request for an automatic refund/write off instruction. **Note:** The list includes only those status reasons which are defined in the **REFWO_INST_RSN_CD_FLG** lookup field.	Yes

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Attribute Name	Description	Mandatory (Yes or No)
Instruction Cancel Reason on Account Balance Change	Used to indicate the reason why you want to the cancel an automatic refund/write off instruction. The system uses this status reason when the current account balance does not match the account balance retrieved through the **C1-RFWO1** batch. **Note:** The list includes only those status reasons which are defined in the **REFWO_INST_RSN_CD_FLG** lookup field.	Yes
Instruction Cancel Reason on Reinstatement	Used to indicate the reason why you want to the cancel an automatic refund/write off instruction. The system uses this status reason when the following conditions are met: • The respective terminated fully insured group policy or individual membership is reinstated. • The automatic refund/write off instruction is in the **Pending**, **Valid**, **Pending Completion**, or **Completed** status. **Note:** The list includes only those status reasons which are defined in the **REFWO_INST_RSN_CD_FLG** lookup field.	Yes
Instruction Cancel Reason on Rejecting Request	Used to indicate the reason why you want to the cancel an automatic refund/write off instruction. The system uses this status reason when the approver rejects the refund/write off request created via an automatic refund/write off instruction. **Note:** The list includes only those status reasons which are defined in the **REFWO_INST_RSN_CD_FLG** lookup field.	Yes
Refund Request Type	Used to indicate the refund request type using which you want to create a refund request for an automatic refund instruction. The system considers this refund request type when the account balance is greater than zero and greater than or equal to the refund threshold amount (specified in the refund/write off business rule). **Note:** The list includes only those refund/write off request types which are in the **Active** status.	Yes
Refund Request Reject Reason on Reinstatement	Used to indicate the reason why you want to the reject a refund request created via an automatic refund instruction. The system uses this status reason when the following conditions are met: • The respective terminated fully insured group policy or individual membership is reinstated. • The automatic refund instruction is in the **Pending Completion** status and the refund request is in the **Approval in Progress** status. **Note:** The list includes only those status reasons which are defined in the **REFWO_INST_RSN_CD_FLG** lookup field.	Yes

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Attribute Name	Description	Mandatory (Yes or No)
Void Status Reason for Refund Request on Reinstatement	Used to indicate the reason why you want to the void a refund request created via an automatic refund instruction. The system uses this status reason when the following conditions are met: • The respective terminated fully insured group policy or individual membership is reinstated or when the refund request created via an automatic refund instruction is voided from the user interface. • The automatic refund instruction is in the **Pending Completion** status and the refund request is in the **Hold** status. OR The automatic refund instruction is in the **Completed** status and the refund request is in the **Processed** status. **Note:** Here, you must specify a status reason which is already defined for the **Deferred Void** status of the **C1-RefundReq** business object.	Yes
Write Off Request Type	Used to indicate the write off request type using which you want to create a write off request for an automatic write off instruction. The system considers this write off request type when the account balance is less than zero and less than or equal to the write off threshold amount (specified in the refund/write off business rule). **Note:** The list includes only those refund/write off request types which are in the **Active** status.	Yes
Write Off Request Reject Reason on Reinstatement	Used to indicate the reason why you want to the cancel a write off request created via an automatic write off instruction. The system uses this status reason when the following conditions are met: • The respective terminated fully insured group policy or individual membership is reinstated. • The automatic write off instruction is in the **Pending Completion** status and the write off request is in the **Approval in Progress** status. **Note:** The list includes only those status reasons which are defined in the **REFWO_INST_RSN_CD_FLG** lookup field.	Yes

Tip: Alternatively, you can click the **Edit** button in the **Field Mapping** zone to edit the details of the automatic refund/write off preference.

3. Modify the required details in the **Main** section.
4. Define, edit, or remove the attribute from the automatic refund/write off preference, if required.

Note: You must set at least one attribute in the automatic refund/write off preference.

5. Click **Save**.
   The changes made to the automatic refund/write off preference are saved.

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Related Topics

For more information on...	See...
How to search for an automatic refund/write off preference	Searching for an Automatic Refund/Write Off Preference on page 4043

Copying an Automatic Refund/Write Off Preference

Instead of creating an automatic refund/write off preference from scratch, you can create a new automatic refund/write off preference using an existing automatic refund/write off preference. This is possible through copying an automatic refund/write off preference. On copying an automatic refund/write off preference, the details including the attributes are copied to the new automatic refund/write off preference. You can then edit the details, if required.

Prerequisites

To copy an automatic refund/write off preference, you should have:

- Automatic refund/write off preference (whose copy you want to create) defined in the application
- Required characteristic types defined in the application (where the characteristic entity is set to **Membership**)
- Values defined in the **REFWO_INST_RSN_CD_FLG** lookup field
- Required refund request types and write off request types defined in the application
- Required reasons defined for the **Deferred Cancel** status of the **C1-WORequest** business object in the **Status Reason** screen
- Required reasons defined for the **Deferred Void** status of the **C1-RefundReq** business object in the **Status Reason** screen

Procedure

To copy an automatic refund/write off preference:

1. Search for the automatic refund/write off preference in the **Field Mapping** screen.
2. In the **Search Results** section, click the **Duplicate** (⧉) icon in the **Duplicate** column *c*orresponding to the automatic refund/write off preference whose copy you want to create.

   The **Field Mapping** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details for the automatic refund/write off preference. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Preference	Used to specify the automatic refund/write off preference.	Yes
Description	Used to specify the description for the automatic refund/write off preference.	Yes
Detailed Description	Used to specify additional information about the automatic refund/write off preference. **Note:** You can resize the text box depending on your requirement by clicking the **Resize Handle** (⇲) icon at the bottom right corner of the text box.	No
Status	Used to indicate the status of the automatic refund/write off preference. The valid values are: • Active • Inactive	Yes

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Field Name	Field Description	Mandatory (Yes or No)
Preference Category	Indicates the category to which the preference belongs. The valid value is: • Automatic Refund/Write-Off	Not applicable

- **Preference Settings** - Used to set the attributes in the automatic refund/write off preference. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Attribute	Used to indicate the attribute that you want to set in the automatic refund/write off preference. **Note:** The attribute list appears only when the preference category is selected from the respective list.	Yes
Value	Used to specify the attribute value. **Note:** The attribute value list appears only when the attribute is selected from the respective list. The attribute value list varies depending on the attribute that you want to set in the automatic refund/write off preference.	Yes
Entity Type	Used to indicate the type of entity for which the attribute is applicable. The valid values are: • Account • Adjustment • Billable Charge • Membership • Payment • Policy **Note:** At present, this data is stored for informational purposes only and is not considered in the business logic. If required, you can add more entity types to the **MAP_ENTITY_FLG** lookup field.	No

The following table lists and describes the attributes available while defining, editing, or copying the automatic refund/write off preference:

Attribute Name	Description	Mandatory (Yes or No)
Cancel Status Reason for Write Off Request on Reinstatement	Used to indicate the reason why you want to the cancel a write off request created via an automatic write off instruction. The system uses this status reason when the following conditions are met: • The respective terminated fully insured group policy or individual membership is reinstated or when the write off	Yes

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Attribute Name	Description	Mandatory (Yes or No)
	request created via an automatic write off instruction is canceled from the user interface. • The automatic write off instruction is in the **Completed** status and the write off request is in the **Processed** status. **Note:** Here, you must specify a status reason which is already defined for the **Deferred Cancel** status of the **C1-WORequest** business object.	
Error Code on Processing Refund/ Write Off Request	Used to indicate the reason why you want to the cancel an automatic refund/write off instruction. The system uses this status reason when an error occurs while creating a refund/write off request for an automatic refund/write off instruction. **Note:** The list includes only those status reasons which are defined in the **REFWO_INST_RSN_CD_FLG** lookup field.	Yes
Instruction Cancel Reason on Account Balance Change	Used to indicate the reason why you want to the cancel an automatic refund/write off instruction. The system uses this status reason when the current account balance does not match the account balance retrieved through the **C1-RFWO1** batch. **Note:** The list includes only those status reasons which are defined in the **REFWO_INST_RSN_CD_FLG** lookup field.	Yes
Instruction Cancel Reason on Reinstatement	Used to indicate the reason why you want to the cancel an automatic refund/write off instruction. The system uses this status reason when the following conditions are met: • The respective terminated fully insured group policy or individual membership is reinstated. • The automatic refund/write off instruction is in the **Pending**, **Valid**, **Pending Completion**, or **Completed** status. **Note:** The list includes only those status reasons which are defined in the **REFWO_INST_RSN_CD_FLG** lookup field.	Yes
Instruction Cancel Reason on Rejecting Request	Used to indicate the reason why you want to the cancel an automatic refund/write off instruction. The system uses this status reason when the approver rejects the refund/write off request created via an automatic refund/write off instruction. **Note:** The list includes only those status reasons which are defined in the **REFWO_INST_RSN_CD_FLG** lookup field.	Yes
Refund Request Type	Used to indicate the refund request type using which you want to create a refund request for an automatic refund instruction. The system considers this refund request type when the account balance is greater than zero and greater than or equal to the refund threshold amount (specified in the refund/write off business rule).	Yes

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Attribute Name	Description	Mandatory (Yes or No)
	Note: The list includes only those refund/write off request types which are in the **Active** status.	
Refund Request Reject Reason on Reinstatement	Used to indicate the reason why you want to the reject a refund request created via an automatic refund instruction. The system uses this status reason when the following conditions are met: • The respective terminated fully insured group policy or individual membership is reinstated. • The automatic refund instruction is in the **Pending Completion** status and the refund request is in the **Approval in Progress** status. **Note:** The list includes only those status reasons which are defined in the **REFWO_INST_RSN_CD_FLG** lookup field.	Yes
Void Status Reason for Refund Request on Reinstatement	Used to indicate the reason why you want to the void a refund request created via an automatic refund instruction. The system uses this status reason when the following conditions are met: • The respective terminated fully insured group policy or individual membership is reinstated or when the refund request created via an automatic refund instruction is voided from the user interface. • The automatic refund instruction is in the **Pending Completion** status and the refund request is in the **Hold** status. OR The automatic refund instruction is in the **Completed** status and the refund request is in the **Processed** status. **Note:** Here, you must specify a status reason which is already defined for the **Deferred Void** status of the **C1-RefundReq** business object.	Yes
Write Off Request Type	Used to indicate the write off request type using which you want to create a write off request for an automatic write off instruction. The system considers this write off request type when the account balance is less than zero and less than or equal to the write off threshold amount (specified in the refund/write off business rule). **Note:** The list includes only those refund/write off request types which are in the **Active** status.	Yes
Write Off Request Reject Reason on Reinstatement	Used to indicate the reason why you want to the cancel a write off request created via an automatic write off instruction. The system uses this status reason when the following conditions are met: • The respective terminated fully insured group policy or individual membership is reinstated.	Yes

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Attribute Name	Description	Mandatory (Yes or No)
	• The automatic write off instruction is in the **Pending Completion** status and the write off request is in the **Approval in Progress** status.	
	Note: The list includes only those status reasons which are defined in the **REFWO_INST_RSN_CD_FLG** lookup field.	

Note: While defining an automatic refund/write off preference, you must set at least one attribute in the automatic refund/write off preference.

Tip: Alternatively, you can click the **Duplicate** button in the **Field Mapping** zone to create a copy of the automatic refund/write off preference.

3. Enter the required details in the **Main** section.
4. Define, edit, or remove the attribute from the automatic refund/write off preference, if required.
5. Click **Save**.
   The new automatic refund/write off preference is defined.

Related Topics

For more information on...	See...
How to search for an automatic refund/write off preference	Searching for an Automatic Refund/Write Off Preference on page 4043

Deleting an Automatic Refund/Write Off Preference

Procedure

To delete an automatic refund/write off preference:

1. Search for the automatic refund/write off preference in the **Field Mapping** screen.
2. In the **Search Results** section, click the **Delete** (🗑) icon in the **Delete** column *c*orresponding to the automatic refund/write off preference that you want to delete.
   A message appears confirming whether you want to delete the automatic refund/write off preference.

Tip: Alternatively, you can click the **Delete** button in the **Field Mapping** zone to delete the automatic refund/write off preference.

3. Click **OK**.
   The automatic refund/write off preference is deleted.

Related Topics

For more information on...	See...
How to search for an automatic refund/write off preference	Searching for an Automatic Refund/Write Off Preference on page 4043

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Refund/Write Off Instruction

The **Refund/Write off Instruction** screen allows you to search for refund/write off instruction using various search criteria. It also enables you to view the automatic refund/write off instructions of an account which are created on terminating a fully-insured group policy or individual membership. It contains the following zone:

- Search Refund/Write Off Instruction on page 4059

Related Topics

For more information on...	See...
How to search for a refund/write off instruction	Searching for a Refund/Write off Instruction on page 4061

Search Refund/Write Off Instruction

The **Search Refund/Write off Instruction** zone allows you to search for a refund/write off instruction using various search criteria. This zone contains the following two sections:

- **Search Criteria** - The **Search Criteria** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Search By	Used to indicate whether you want to search for a refund or write off instruction using the policy or individual membership details. The valid values are: • Policy Details • Individual Membership Details **Note:** By default, the **Policy Details** option is selected.	Yes
Policy ID	Used to search refund or write off instructions which are created using a particular policy. **Note:** The **Search** (🔍) icon appears corresponding to this field. On clicking the **Search** icon, the **Search Policy** window appears. This field appears when the **Policy Details** option is selected from the **Search By** list.	No
Account ID	Used to search refund or write off instructions which are created for particular account. **Note:** The **Search** (🔍) icon appears corresponding to this field. On clicking the **Search** icon, the **Account Search** window appears.	No
Membership ID	Used to search refund or write off instructions which are created for particular membership.	No

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Field Name	Field Description	Mandatory (Yes or No)
	Note: This field appears when the **Individual Membership Details** option is selected from the **Search By** list.	
Created From	Used to search refund or write off instructions which are created from a particular date onwards.	No
Status	Used to search refund or write off instructions with a particular status. The valid values are: • Canceled • Completed • Error • Invalid • Pending • Pending Completion • Valid	No
Created Until	Used to search refund or write off instructions which are created till a particular date.	No
Action	Used to indicate whether the instructions are created for refund or write off. The valid values are: • Refund • Write Off	No

Note: You must specify at least one search criterion while searching for a refund or write off instruction.

- **Search Results** - On clicking the **Search** button, the search results appear based on the specified search criteria. The **Search Results** section contains the following columns:

Column Name	Column Description
Policy Information	Displays information about the policy for which the refund or write off instruction is created.
	Note: It has a link. On clicking the link, the **Policy** screen appears where you can view the details of the respective policy. This column appears when you select the **Policy Details** option from the **Search By** list.
Membership Information	Displays information about the membership for which the refund or write off instruction is created.
	Note: It has a link. On clicking the link, the **Membership** screen appears where you can view the details of the individual membership. This column appears when you select the **Individual Membership Details** option from the **Search By** list.

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Column Name	Column Description
Account Information	Displays the account for which the refund or write off instruction is created. In addition, this column has a context menu which helps in navigating to other screens in the application. **Note:** It has a link. On clicking the link, the **Account** screen appears where you can view the details of the respective account.
Creation Date Time	Displays the date and time when the refund or write off instruction is created.
Status	Indicates the status of the refund or write off instruction. The valid values are: • Canceled • Completed • Error • Invalid • Pending • Pending Completion • Valid
Reason	Displays the reason for which the refund or write off instruction is created in the system.
Action	Indicates whether the instruction is created for refund or write off. The valid values are: • Refund • Write Off
Request Creation Date	Displays the date when the request is created.
Refund/Write Off Request Information	Displays information about the refund or write off request. **Note:** It has a link. On clicking the link, the **Refund Request** or **Write Off Request** screen appears depending on whether the request is for refund or write off.

Related Topics

For more information on...	See...
How to search for a refund/write off instruction	Searching for a Refund/Write off Instruction on page 4061

Searching for a Refund/Write off Instruction

Prerequisites

To search for a refund/write off instruction, you should have:

- Refund or Write Off Instruction defined in the application

Procedure

To search for a refund/write off instruction:

1. Click the **Menu** link in the **Application** toolbar.
   A list appears.
2. From the **Main** menu, select **Accounting and Receivable** and then click **Refund/Write off Instruction**.
   The **Refund/Write off Instruction** screen appears.

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3. Enter the search criteria in the **Refund/Write off Instruction** zone.

> **Note:** ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.

4. Click **Search**.
   A list of refund or write off instructions that meets the search criteria appears in the **Search Results** section.

Related Topics

For more information on...	See...
Search Refund/Write off Instruction zone	Search Refund/Write Off Instruction on page 4059

Chapter 55

Delinquency Management

Topics:

- Group Health Insurance Delinquency
- Individual Health Insurance Delinquency
- Direct Billed Group Membership Delinquency
- Account Level Delinquency Process
- Account Level Delinquency Process Creation
- Person Level Delinquency Process
- Person Level Delinquency Process Creation
- Types of Delinquency Processes
- Delinquency Monitoring for a Person or an Account
- Delinquency Event Type
- Collection Class
- Referring Paid through Date in Delinquency Management
- Prerequisites for Individual Delinquency
- Prerequisites for Group Delinquency
- Prerequisites for Direct Billed Group Membership Delinquency Management
- Delinquency Event (Automated Process) Status Transition
- Delinquency Event (Manual Process) Status Transition
- Delinquency Event (Manual or Automatic Process) Status Transition
- Delinquency Process Status Transition

Most often, the fully insured group, direct billed group membership, and fully insured individual lines of business come across scenarios wherein customers fail to pay premium for their policy or health plans, respectively, on time, resulting in delinquency. For the fully insured group business, ORMB enables you to establish a delinquency process at the person (i.e. parent customer or bill group) level to whom the policies are billed or at the account (i.e. parent customer's or bill group's account) level to which the policies are billed. However, for the direct billed group membership and fully insured individual lines of business, ORMB enables you to establish a delinquency process only at the account level to which the direct billed group memberships or individual memberships are billed. A delinquency process signifies a set of procedures and policies that are in place to manage overdue or unpaid insurance premiums.

The system refers the collection class of the person or account, respectively, to control its collection lifecycle. The system monitors the account's debt using the bills of the account as the collection objects. However, the system monitors the person's debt using the bills of all its accounts in its hierarchy as the collection objects. The following screens are introduced for the **Delinquency Management** feature:

- Delinquency Control (Screen) on page 4207
- Delinquency Event Type (Screen) on page 4214
- Delinquency Process Type (Screen) on page 4222
- Delinquency Process (Used for Searching) on page 4262
- Delinquency Process (Used for Viewing) on page 4267

The system can create a delinquency process only when the following prerequisites are configured:

- If you want to create a delinquency process for a person or an account, you need to set the collection method of the respective collection class to **Self-Control Delinquency**. If you want to evaluate the debt of a person or an account while monitoring the parent person's delinquency, you need to set the collection method of the respective collection class to **Parental Delinquency**. However, if you want to ignore a person or an account while monitoring the delinquency, you need to set the collection method of the respective collection class to **Not Eligible for Collection**. For more information, see Collection Class on page 4098.
- A delinquency control is defined for the required collection classes. For more information, see Delinquency Control (Screen) on page 4207.
- The required delinquency event types and delinquency process types are defined in the system. For more information about the delinquency event type and delinquency process type, see Delinquency Event Type (Screen) on page 4214 and Delinquency Process Type (Screen) on page 4222.
- A preference of the following preference categories is defined in the system:

- Group Delinquency Process Status Transition for an Account
- Group Delinquency Process Status Transition for a Person
- Delinquency Process Status Transition for Group Direct Billed Membership Delinquency Management
- Delinquency Process Type
- Delinquency Process Types Based on Insurance Coverage
- Delinquency Event Eligibility Evaluation and Trigger Date Calculation
- Delinquency Process Maintenance
- Delinquency Process Approval
- Canceling a Delinquency Process
- Resuming a Delinquency Process
- Membership Termination Outbound Message
- Membership Cancellation Outbound Message
- Creating Customer Contacts for Each Membership Billed to Delinquent Customer or Account
- Outbound Message Generation for Delinquency Management
- Allocate Advance Deposit for Delinquent Customers
- Algorithm Used in Delinquency Control
- Algorithms Used in Delinquency Process Type
- Algorithm Used in C1-DelinquencyProcess
- Algorithm Types for Payment Cancellation System Event
- Delinquency Control (Screen)
- Delinquency Event Type (Screen)
- Delinquency Process Type (Screen)
- Delinquency Process Maintenance
- Delinquency Process (Used for Searching)

  - Delinquency Process Preference on page 4295
  - Delinquency Process Type Preference on page 4282
  - Individual Membership Preference on page 404 (required only for the fully insured individual business)
  - Routing Method – Contact Method Mapping Preference on page 4311
- The parameters required to create the business rule criteria are defined in the system.
- The business rules of the following categories are defined in the system:

  - Delinquency Event Attributes Business Rule on page 3693
  - Delinquency Grace Period Business Rule on page 3692
  - Delinquency Miscellaneous Options Business Rule on page 3696
  - Delinquency Termination Date Rule Business Rule on page 3695
- Required rule types and rules are defined to determine whether the delinquency event is eligible to be included in the delinquency process of a person or an account. For more information, see Delinquency Event Eligibility Evaluation and Trigger Date Calculation on page 4163.
- The outbound message types are defined for the following business objects:

  - **C1-MemberTermRequest** (required only for the fully insured individual and direct billed group membership lines of business)
  - **C1-MemberCancRequest** (required only for the fully insured individual and direct billed group membership lines of business)
  - **C1-PolicyTerminateRequest** (required only for the fully insured group business)
  - **C1-PolicyReinstateRequest** (required only for the fully insured group business)
- The following option types are defined in the **C1-ASOBLLNG** feature configuration:

  - **Individual Membership Configurations** (required only for the fully insured individual business)
  - **Membership Active Status** (required only for the fully insured individual and direct billed group membership lines of business)
  - **Membership Terminated Status** (required only for the fully insured individual and direct billed group membership lines of business)
  - **Policy Active Status** (required only for the fully insured group business)
  - **Policy Pending Reinstatement Status** (required only for the fully insured group business)
  - **Policy Pending Termination Status** (required only for the fully insured group business)

  For more information about these option types, see Setting the C1-ASOBLLNG Feature Configuration on page 4417.
- Set the batch control type of the following batches to **Timed** and execute them in the below given sequence:

  1. **C1-DPMON**
  2. **C1-PRDLQ** (required only for the fully insured group business)
  3. **C1-ACDLQ**
  4. **C1-DPEVL**
  5. **C1-MBRNT** (required only for the fully insured group business)
  6. **C1-HLMON**
  7. **C1-ADMON** (required only if the advance deposit feature is opted for the fully insured group business)

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- Delinquency Process (Used for Viewing)
- Delinquency Process Type Preference
- Delinquency Process Preference
- Routing Method – Contact Method Mapping Preference

8. **C1-MTOMT** (required only for the fully insured individual and direct billed group membership lines of business)

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Group Health Insurance Delinquency

The system enables you to create a delinquency process at the person or account level for the fully insured group business. You can create a delinquency process at the person or account level only when the collection method in the person's or account's collection class is set to **Self-Control Delinquency**.

In the account level delinquency process, the system monitors the debt of the account at predefined system events and commences the delinquency process whenever the account's debt is overdue. The system creates a delinquency process for an account only when at least one bill of the account is overdue. Note that the system ignores the account while monitoring the delinquency when the collection method in the respective collection class is set to **Not Eligible for Collection**.

However, in the person level delinquency process, the system considers all its accounts and its child persons' accounts where the collection method in their respective collection class is set to **Parental Delinquency**. It then monitors the debt of the person's and its child persons' accounts at predefined system events and commences the delinquency process whenever any of its account's debt is overdue. Note that, in the person's hierarchy, if the collection method in the collection class of any account is set to **Self-Control Delinquency**, then such account is not considered while monitoring the parent person's delinquency. The system creates a distinct delinquency process for each such account where the collection method in the respective collection class is set to **Self-Control Delinquency**. Similarly, in the person's hierarchy, if the collection method in the collection class of any child person is set to **Self-Control Delinquency**, then all the child person's accounts and its grandchild persons' accounts are not considered in the parent person's delinquency. The system creates a distinct delinquency process for each such person (i.e. bill group) where the collection method in the respective collection class is set to **Self-Control Delinquency**. The system creates a delinquency process for a person only when at least one bill of any account (considered) in its hierarchy is overdue.

Note that the system ignores the persons and accounts in the person's hierarchy while monitoring the delinquency when the collection method in the respective collection class is set to **Not Eligible for Collection**.

Individual Health Insurance Delinquency

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

Note that the system ignores the account while monitoring the delinquency when the collection method in the respective collection class is set to **Not Eligible for Collection**.

Direct Billed Group Membership Delinquency

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

Note that the system ignores the account while monitoring the delinquency when the collection method in the respective collection class is set to **Not Eligible for Collection**.

Account Level Delinquency Process

To create a delinquency process at the account level, the system requires the following collection details of the account:

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- **Collection Class** – Used to control how the account's debt is compared against collection criteria (i.e. tolerance limit) to determine whether a collection process (such as delinquency process) should be initiated for the account. A new collection method named **Self-Control Delinquency** is available while defining a collection class. It is used to create a distinct or separate delinquency process for the accounts which belong to the collection class. You can specify the collection class for an account from the user interface or through a health care inbound message.

  Note:

  If you do not want to initiate delinquency process for an account, ensure that the account belongs to a collection class where the collection method is set to **Not Eligible for Collection**.

  If the collection class is not specified for an account, the system, by default, sets it to the one specified in the respective customer class when you create the account through a health care inbound message.

- **Credit Review Grace Days** – Used to indicate the number of days from the bill due date or the processing date after which the account's debt should be monitored for delinquency. For example, if the bill due date is 07-Jan-2024 and credit review grace days is set to 10, then the system will consider the account for monitoring the delinquency on or after 17-Jan-2024. You can specify the credit review grace days for the customer class to which the account belongs from the user interface.

  Note: The system considers the bill due date in case of bill events and the processing date in case of non-bill events while monitoring the delinquency of an account.

- **Next Credit Review Date** – Used to indicate the date when the account should be considered for monitoring the delinquency. The system calculates the next credit review date for the account using the bill due date or the processing date and the credit review grace days. The next credit review date of the account is stored in the **CI_ADM_RVW_SCH** table. The system calculates the next credit review date for the account on the following system events:
  - Bill Completion
  - Payment Cancellation (due to Non-Sufficient Funds)
  - Active Overdue Process Review
  - Match Event is Added, Changed, or Deleted
  - Payment Freeze
  - Payment Agreement Request or Promise to Pay is Broken or Canceled
  - Written Off Bill is Reversed
- **Postpone Credit Review Until** – Used when you want to review the account's debt after a particular date. The system will consider the account for monitoring the delinquency only after the specified date. You can specify the postpone credit review until date for an account from the user interface or through a health care inbound message.
- **Credit Rating** – Used to indicate the credit rating of the account. It is calculated by the system using the credit rating transactions which are effective on the system date. The system then considers the sum of account's credit rating and credit rating threshold (defined in the installation options) to determine whether the account's debt should be monitored for delinquency.
- **Minimum Credit Review Frequency** – Used to indicate the frequency at which the accounts belonging to the respective collection class should be monitored for delinquency. In other words, it indicates in how many days the system should review whether the bills of the accounts are overdue. You can specify the minimum credit review frequency for a delinquency control of a collection class from the user interface.
- **Last Credit Review Date** – Used to indicate the date when the account's debt was last reviewed. The system stamps the last credit review date against an account when a delinquency process is initiated for the account through the **C1-ACDLQ** batch.
- **Drag Days** – Used to specify additional grace days (if any) offered at the account level. These drag days are considered while calculating the grace end date when the trigger date calculation mode (in the respective delinquency process type) is set to either **Latest Bill Due Date with Grace Period** or **Usage Basis**. For example, if the latest bill due date is 05-Jan-2024, grace period is set to 5 days (in the respective delinquency process type), and drag days is to 10 days (for the respective account), then the grace end date for the account is set to 20-Jan-2024.

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Account Level Delinquency Process Creation

The **C1-ACDLQ** batch is used to create a delinquency process for an account when its overdue bills do not meet the tolerance limit. It considers the accounts which meet the following conditions:

- Collection method of the collection class to which the account belongs is set to **Self-Control Delinquency**
- Next credit review date is either not calculated for the account or is earlier than or equal to the batch business date
- Postpone credit review until date is either not defined for the account or is earlier than or equal to the batch business date
- The date derived using the last credit review date + minimum credit review frequency(defined in the delinquency control) is either blank or is earlier than or equal to the batch business date

Note: The next credit review date of an account is stored in the **CI_ADM_RVW_SCH** table and the postpone credit review until date of an account is stored in the **CI_ACCT** table.

Once the list of accounts are derived, the system executes the delinquency monitor rule algorithm which is attached to the delinquency control of the respective account's collection class. If the system is not able to derive the delinquency monitor rule algorithm for an account, an appropriate error message is shown in the batch run tree. If the system is able to derive the delinquency monitor rule algorithm for an account and if the new delinquency process is successfully created for an account or if an existing delinquency process is updated for an account, this batch sets the last credit review date of the account in the **CI_ACCT** table to the processing date.

For more information on how the **C1-DLNQMNRL** algorithm (attached to the delinquency control) derives the overdue bills, see Delinquency Monitoring for a Person or an Account on page 4084.

This batch is a multi-threaded batch. The multi-threading is based on account ID and chunks for multi-threading are created based on numerical distribution of account ID. For more information, see the *Oracle Revenue Management and Billing Batch Guide*.

If a new delinquency process is successfully created for an account, the status of the delinquency process is set to the value (for example, **Initiated**) specified in the **Delinquency Process Initiated Status** attribute of the delinquency process preference. Note that the system considers the preference which is specified in the **Delinquency Process Field Mapping** option type of the **DELINPROC** feature configuration. For more information about the feature configuration, see Setting the DELINPROC Feature Configuration on page 4442.

The system then invokes the **C1-DPEVTCR** algorithm is attached to the **Initiated** status. The **C1-DPEVTCR** algorithm creates a delinquency event of each delinquency event type that is added in the delinquency process type using which the delinquency process is created. If the delinquency event trigger mode is set to **Manual** in the delinquency process type, the status of the delinquency event is set to **Pending**. However, if the delinquency event trigger mode is set to **Automatic or Manual** or **Automatic** in the delinquency process type, the status of the delinquency event is set to **Pending Evaluation**.

Once the delinquency events are created for the delinquency process, this algorithm does the following:

- Sets the delinquency due date of the delinquency process to the latest bill due date
- Derives the grace period from the delinquency process type or using an algorithm attached to the **Grace Period Derivation** system event depending on the grace period source which is specified in the delinquency process type
- Sets the grace start date in the following manner:

Trigger Date Calculation Mode	Usage Basis	Grace Start Date Basis	Grace Start Date is set to…
Latest Bill Due Date with Grace Period	-	-	Latest Bill Due Date
Usage Basis	Delinquency Process Creation Date	-	Delinquency Process Creation Date

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Trigger Date Calculation Mode	Usage Basis	Grace Start Date Basis	Grace Start Date is set to…
Usage Basis	Grace Start Date	Latest Bill Due Date	Latest Bill Due Date
Usage Basis	Grace Start Date	X Days after Latest Bill Due Date	Latest Bill Due Date + Add Days To Due Date
Usage Basis	Grace Start Date	Delinquency Process Creation Date	Delinquency Process Creation Date
Usage Basis	Latest Bill Date	-	Latest Bill Date
Usage Basis	Latest Bill Due Date	-	Latest Bill Due Date

- Calculates the grace end date in the following manner:

Trigger Date Calculation Mode	Usage Basis	Grace Start Date Basis	Grace Start Date	Grace End Date is set to…
Latest Bill Due Date with Grace Period	-	-	Latest Bill Due Date	Grace Start Date + Grace Period + Drag Days (if any, defined at the respective level (i.e. account or person)
Usage Basis	Delinquency Process Creation Date	-	Delinquency Process Creation Date	Grace Start Date + Grace Period + Drag Days (if any, defined at the respective level (i.e. account or person)
Usage Basis	Grace Start Date	Latest Bill Due Date	Latest Bill Due Date	Grace Start Date + Grace Period + Drag Days (if any, defined at the respective level (i.e. account or person)
Usage Basis	Grace Start Date	X Days after Latest Bill Due Date	Latest Bill Due Date + Add Days To Due Date	Grace Start Date + Grace Period + Drag Days (if any, defined at the respective level (i.e. account or person)
Usage Basis	Grace Start Date	Delinquency Process Creation Date	Delinquency Process Creation Date	Grace Start Date + Grace Period + Drag Days (if any, defined at the respective level (i.e. account or person)
Usage Basis	Latest Bill Date	-	Latest Bill Date	Grace Start Date + Grace Period + Drag Days (if any, defined at the respective level (i.e. account or person)
Usage Basis	Latest Bill Due Date	-	Latest Bill Due Date	Grace Start Date + Grace Period + Drag Days (if any, defined at the respective level (i.e. account or person)

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Note: This algorithm does not calculate the trigger date and preview date for the events when delinquency event trigger mode is set to **Manual** in the delinquency process type. However, the system calculates the trigger date and preview date for the events when delinquency event trigger mode is set to **Automatic or Manual** or **Automatic** in the delinquency process type while executing the **C1-DPEVL** batch.

Once a delinquency process is created for an account, you can perform the following actions on the delinquency process from the user interface:

- Add additional information in the form of comments or characteristics
- Manually hold a delinquency process and edit the hold details (if required)
- Manually release a hold on the delinquency process
- Manually cancel a delinquency process
- Edit the trigger date of the delinquency events in the delinquency process
- Trigger or skip the delinquency events in the delinquency process
- Request to reinstate the delinquency process (only applicable for the fully insured group business)
- Approve, reject, or withdraw an approval record of the delinquency process

For more information about the manual actions, see Delinquency Process Maintenance on page 4164. The system also enables you to do the following:

- Automatically hold a delinquency process when the certain conditions are met
- Automatically release a hold on the delinquency process when the certain conditions are met
- Automatically cancel a delinquency process when the certain conditions are met
- Automatically resume a cancelled delinquency process when the certain conditions are met
- Automatically reinstate a delinquency process when the certain conditions are met (only applicable for the fully insured group business)

To enable the automatic process for the above actions, you need to accordingly configure the delinquency process type. The system also enables you to optionally configure the approval process for various manual actions that you can perform on the delinquency event or delinquency process. For more information, see Delinquency Process Approval on page 4169.

A delinquency event and process goes through various statuses in its lifecycle. The delinquency process status also accordingly changes when the policies, direct billed group memberships, or individual memberships billed to the account are terminated or reinstated.

Person Level Delinquency Process

To create a delinquency process at the person level, the system requires the following collection details of the person:

- **Collection Class** - Used to control how the person's debt is compared against collection criteria (i.e. tolerance limit) to determine whether a collection process (such as delinquency process) should be initiated for the person. A new collection method named **Self-Control Delinquency** is available while defining a collection class. It is used to create a distinct or separate delinquency process for the persons who belong to the collection class. You can specify the collection class for a person from the user interface or through a health care inbound message.

  If you want to evaluate the debt of the person's accounts, its child persons, and the child persons' accounts while monitoring the person's delinquency, you must set the collection method of their respective collection class to **Parental Delinquency**. If you set the collection method of the collection class for any of the person's account, any of its child person, or child persons' accounts to **Self-Control Delinquency**, the system does not consider the debt of the respective entity while monitoring the delinquency of the parent person.

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> **Note:**
>
> If you do not want to initiate delinquency process for a child person or an account, ensure that the person or account belongs to a collection class where the collection method is set to **Not Eligible for Collection**.
>
> If the collection class is not defined for a person, the system skips the person while monitoring the delinquency.

- **Next Credit Review Date** - Used to indicate the date when the person should be considered for monitoring the delinquency. The system calculates the next credit review date for the account on the following system events:
  - Bill Completion
  - Payment Cancellation (due to Non-Sufficient Funds)
  - Active Overdue Process Review
  - Match Event is Added, Changed, or Deleted
  - Payment Freeze
  - Payment Agreement Request or Promise to Pay is Broken or Canceled
  - Written Off Bill is Reversed

  If the collection method in the account's collection class is set to **Parental Delinquency**, the system automatically traverses up the hierarchy and checks whether the collection method in the collection class of its main customer or any of its parent person in the hierarchy is set to **Self-Control Delinquency**. If so, the system sets the next credit review date of the person to the account's next credit review date. The next credit review date of the person is stored in the **C1_PER_RVW_SCH** table.
- **Postpone Credit Review Until** - Used when you want to review the person's debt after a particular date. The system will consider the person for monitoring the delinquency only after the specified date. You can specify the postpone credit review until date for a person through a health care inbound message.
- **Credit Rating** - Used to indicate the credit rating of the person. It is calculated by adding the credit rating of all the accounts where the person is the main customer. The system then considers the sum of person's credit rating and credit rating threshold (defined in the installation options) to determine whether determine whether the person's debt should be monitored for delinquency.
- **Minimum Credit Review Frequency** - Used to indicate the frequency at which the persons belonging to the respective collection class should be monitored for delinquency. In other words, it indicates in how many days the system should review whether the bills of the persons are overdue. You can specify the minimum credit review frequency for a delinquency control of a collection class from the user interface.
- **Last Credit Review Date** - Used to indicate the date when the person's debt was last reviewed. The system stamps the last credit review date against a person when a delinquency process is initiated for the person through the **C1-PRDLQ** batch.
- **Drag Days** - Used to specify additional grace days (if any) offered at the person level. These drag days are considered while calculating the grace end date when the trigger date calculation mode (in the respective delinquency process type) is set to either **Latest Bill Due Date with Grace Period** or **Usage Basis**. For example, if the latest bill due date is 05-Jan-2024, grace period is set to 5 days (in the respective delinquency process type), and drag days is to 10 days (for the respective person), then the grace end date for the person is set to 20-Jan-2024.

Person Level Delinquency Process Creation

The **C1-PRDLQ** batch is used to create a delinquency process for a person when its overdue bills do not meet the tolerance limit. It considers the persons which meet the following conditions:

- Collection method of the collection class to which the person belongs is set to **Self-Control Delinquency**
- Next credit review date is either not derived for the person or is earlier than or equal to the batch business date
- Postpone credit review until date is either not defined for the person or is earlier than or equal to the batch business date
- The date derived using the last credit review date + minimum credit review frequency (defined in the delinquency control) is either blank or is earlier than or equal to the batch business date

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Note: The next credit review date of a person is stored in the **C1_PER_RVW_SCH** table and the postpone credit review until date of a person is stored in the **CI_PER** table.

Once the list of persons are derived, the system executes the delinquency monitor rule algorithm which is attached to the delinquency control of the respective person's collection class. If the system is not able to derive the delinquency monitor rule algorithm for a person, an appropriate error message is shown in the batch run tree. If the system is able to derive the delinquency monitor rule algorithm for a person and if the new delinquency process is successfully created for a person or if an existing delinquency process is updated for a person, this batch sets the last credit review date of the person in the **CI_PER** table to the processing date.

For more information on how the **C1-DLNQMNRL** algorithm (attached to the delinquency control) derives the overdue bills, see Delinquency Monitoring for a Person or an Account on page 4084.

This batch is a multi-threaded batch. The multi-threading is based on person ID and chunks for multi-threading are created based on numerical distribution of person ID. For more information, see the *Oracle Revenue Management and Billing Batch Guide*.

If a new delinquency process is successfully created for a person, the status of the delinquency process is set to the value (for example, **Initiated**) specified in the **Delinquency Process Initiated Status** attribute of the delinquency process preference. Note that the system considers the preference which is specified in the **Delinquency Process Field Mapping** option type of the **DELINPROC** feature configuration. For more information about the feature configuration, see Setting the DELINPROC Feature Configuration on page 4442.

The system then invokes the **C1-DPEVTCR** algorithm which is attached to the **Initiated** status. The **C1-DPEVTCR** algorithm creates a delinquency event of each delinquency event type that is added in the delinquency process type using which the delinquency process is created. If the delinquency event trigger mode is set to **Manual** in the delinquency process type, the status of the delinquency event is set to **Pending**. However, if the delinquency event trigger mode is set to **Automatic or Manual** or **Automatic** in the delinquency process type, the status of the delinquency event is set to **Pending Evaluation**.

Once the delinquency events are created for the delinquency process, this algorithm does the following:

- Sets the delinquency due date of the delinquency process to the latest bill due date
- Derives the grace period from the delinquency process type or using an algorithm attached to the **Grace Period Derivation** system event depending on the grace period source which is specified in the delinquency process type
- Sets the grace start date in the following manner:

Trigger Date Calculation Mode	Usage Basis	Grace Start Date Basis	Grace Start Date is set to…
Latest Bill Due Date with Grace Period	-	-	Latest Bill Due Date
Usage Basis	Delinquency Process Creation Date	-	Delinquency Process Creation Date
Usage Basis	Grace Start Date	Latest Bill Due Date	Latest Bill Due Date
Usage Basis	Grace Start Date	X Days after Latest Bill Due Date	Latest Bill Due Date + Add Days To Due Date
Usage Basis	Grace Start Date	Delinquency Process Creation Date	Delinquency Process Creation Date
Usage Basis	Latest Bill Date	-	Latest Bill Date
Usage Basis	Latest Bill Due Date	-	Latest Bill Due Date

- Calculates the grace end date in the following manner:

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Trigger Date Calculation Mode	**Usage Basis**	**Grace Start Date Basis**	**Grace Start Date**	**Grace Start Date is set to…**
Latest Bill Due Date with Grace Period	-	-	Latest Bill Due Date	Grace Start Date + Grace Period + Drag Days (if any, defined at the respective level (i.e. account or person)
Usage Basis	Delinquency Process Creation Date	-	Delinquency Process Creation Date	Grace Start Date + Grace Period + Drag Days (if any, defined at the respective level (i.e. account or person)
Usage Basis	Grace Start Date	Latest Bill Due Date	Latest Bill Due Date	Grace Start Date + Grace Period + Drag Days (if any, defined at the respective level (i.e. account or person)
Usage Basis	Grace Start Date	X Days after Latest Bill Due Date	Latest Bill Due Date + Add Days To Due Date	Grace Start Date + Grace Period + Drag Days (if any, defined at the respective level (i.e. account or person)
Usage Basis	Grace Start Date	Delinquency Process Creation Date	Delinquency Process Creation Date	Grace Start Date + Grace Period + Drag Days (if any, defined at the respective level (i.e. account or person)
Usage Basis	Latest Bill Date	-	Latest Bill Date	Grace Start Date + Grace Period + Drag Days (if any, defined at the respective level (i.e. account or person)
Usage Basis	Latest Bill Due Date	-	Latest Bill Due Date	Grace Start Date + Grace Period + Drag Days (if any, defined at the respective level (i.e. account or person)

Note: This algorithm does not calculate the trigger date and preview date for the events when delinquency event trigger mode is set to **Manual** in the delinquency process type. However, the system calculates the trigger date and preview date for the events when delinquency event trigger mode is set to **Automatic or Manual** or **Automatic** in the delinquency process type while executing the **C1-DPEVL** batch.

Once a delinquency process is created for a person, you can perform the following actions on the delinquency process from the user interface:

- Add additional information in the form of comments or characteristics
- Manually hold a delinquency process and edit the hold details (if required)
- Manually release a hold on the delinquency process
- Manually cancel a delinquency process
- Edit the trigger date of the delinquency events in the delinquency process

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- Trigger or skip the delinquency events in the delinquency process
- Request to reinstate the delinquency process (only applicable for the fully insured group business)

For more information about the manual actions, see Delinquency Process Maintenance on page 4164. The system also enables you to do the following:

- Automatically hold a delinquency process when the certain conditions are met
- Automatically release a hold on the delinquency process when the certain conditions are met
- Automatically cancel a delinquency process when the certain conditions are met
- Automatically resume a cancelled delinquency process when the certain conditions are met
- Automatically reinstate a delinquency process when the certain conditions are met (only applicable for the fully insured group business)

To enable the automatic process for the above actions, you need to accordingly configure the delinquency process type. The system also enables you to optionally configure the approval process for various manual actions that you can perform on the delinquency event or delinquency process. For more information, see Delinquency Process Approval on page 4169.

A delinquency event and process goes through various statuses in its lifecycle. The delinquency process status also accordingly changes when the policies billed to the person are terminated or reinstated.

Types of Delinquency Processes

You can design different types of delinquency processes for each line of business (i.e. fully insured group, direct billed group membership, and fully insured individual business). For example,

- Some may be used to just send warning or harsh letters and/or notifications. Such delinquency processes are applicable to the fully insured group, direct billed group membership, and fully insured individual lines of business.
- Some may be used to initiate the termination request for the direct billed group memberships or individual memberships which are billed to a delinquent account. Such delinquency processes are applicable for the direct billed group membership and fully insured individual lines of business.
- Some may be used to initiate the cancellation request for the direct billed group memberships or individual memberships which are billed to a delinquent account. Such delinquency processes are applicable only for the direct billed group membership and fully insured individual lines of business.
- Some may be used to initiate the termination request for the policies which are billed to a delinquent customer or account. Such delinquency processes are applicable only for the fully insured group business.
- Some may be used to initiate the reinstatement request for the policies which are billed to a delinquent customer or account. Such delinquency processes are applicable only for the fully insured group business.
- Some may be used to settle the unpaid dues for a delinquent customer or account using the advance deposit maintained at the person or policy level. Such delinquency processes are applicable only for the fully insured group business.

The system enables you to send different warning letters or To Do notifications, initiate the termination or cancellation request for the direct billed group memberships or individual memberships, initiate the termination or reinstatement request for the policies, or apply advance deposit to settle the unpaid dues by triggering different delinquency events at predefined intervals through a different delinquency process. The system creates a delinquency process for a person or an account using a delinquency process type. The system determines the delinquency process type using which the delinquency process should be created for a person or an account through the delinquency control. Note that the system considers the delinquency control that is defined for the collection class to which the person or account belongs. For more information about the delinquency control and delinquency process type, see Delinquency Control (Screen) on page 4207 and Delinquency Process Type (Screen) on page 4222.

The system enables you to configure the events that should be triggered in a delinquency process by adding appropriate delinquency event types in a delinquency process type. For more information about the delinquency event type, see Delinquency Event Type on page 4088. The different types of events are triggered in different types of delinquency processes. The system enables you to design the following types of delinquency processes for different set of customers:

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- Debt Notification Delinquency Process on page 4075 (applicable to the fully insured group, direct billed group membership, and fully insured individual customers)
- Debt Collection Letters Delinquency Process on page 4076 (applicable to the fully insured group, direct billed group membership, and fully insured individual customers)
- Individual Membership Cancellation Delinquency Process on page 4078 (applicable to the direct billed group membership and fully insured individual customers)
- Individual Membership Termination Delinquency Process on page 4079 (applicable to the direct billed group membership and fully insured individual customers)
- Advance Deposit Delinquency Process on page 4083 (applicable only to the fully insured group customers)

Debt Notification Delinquency Process

There might be scenarios wherein the group, direct billed group membership, or individual customers fail to pay premium for their policy plan or health plan coverage, respectively. In such cases, you may want to send reminder notifications to the group, direct billed group membership, or individual customers to pay their premium immediately without any delay. Oracle Revenue Management and Billing enables you to send one or more To Do notifications at regular intervals to:

- The person (i.e. parent customer or bill group) when the delinquency process is created for a person
- The main customer of the account when the delinquency process is created for an account

To create a delinquency process to send To Do notifications, you need to design the delinquency process type using which you want to create the delinquency process in a particular manner.

The following table illustrates how you can design the delinquency process type using which you want to create the delinquency process to send To Do notifications.

Delinquency Process Type	Delinquency Event Type	System Event	Algorithm	Algorithm Purpose
DP1	Send First Reminder Notification	Event Activation	C1-DLQCRTODO1	Creates a To Do using the given To Do type
	Send Second Reminder Notification	Event Activation	C1-DLQCRTODO2	Creates a To Do using the given To Do type
	Send Third Reminder Notification	Event Activation	C1-DLQCRTODO3	Creates a To Do using the given To Do type

Note that the **C1-DLQCRTODO** algorithm is shipped with the product. However, you can create different algorithms (for example, **C1-DLQCRTODO1**, **C1-DLQCRTODO2**, and **C1-DLQCRTODO3**) using the **C1-DLQCRTODO** algorithm type when you want to send different reminder notifications at regular intervals to the person or the main customer of the account. For more information about the algorithm, see C1-DLQCRTODO on page 4089.

Note: If you want to send the same reminder notification (i.e. the same message) multiple times at different intervals, you can use the **C1-DLQCRTODO** algorithm in all the delinquency event types. However, if you want to send different reminder notifications (i.e. the different message) at different intervals, you can create different algorithms (for example, **C1-DLQCRTODO1**, **C1-DLQCRTODO2**, and **C1-DLQCRTODO3** as shown above) and attach it to the delinquency event type in the sequence in which you want to send the reminders.

Once a delinquency process is created for a person or an account to send To Do notifications, the status of the delinquency process is set to the value (for example, **Initiated**) specified in the **Delinquency Process Initiated Status** attribute of the delinquency process preference. Once the first event in the delinquency process is triggered, the status of the delinquency process is changed to the value (for example, **Delinquency In Progress**) specified in the **Delinquency Process InProgress Status** attribute of the delinquency process preference. Once a To Do is created for the person or the main customer of the account, the status of the delinquency event is changed to **Completed**. Once all the delinquency events are triggered successfully, the status of the delinquency process is changed to the value (for example, **Completed**) specified in the **Delinquency Process Completed Status** attribute of the delinquency process preference.

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The system may receive a payment or an adjustment against the overdue bill for which a delinquency process is created to send To Do notifications. In such case, the system behaves in the following manner depending on the status of the delinquency process:

- If a payment or an adjustment is made when a delinquency process is in the **Initiated**, **Delinquency In Progress**, **On Hold** status, the status of the delinquency process is changed to the value (for example, **Canceled**) specified in the **Delinquency Process Canceled Status** attribute of the delinquency process preference. For more information on how the delinquency process is automatically canceled, see Canceling a Delinquency Process on page 4170.
- If a payment or an adjustment is made when a delinquency process is in the **Pending Termination** status, the status of the delinquency process is changed to the value (for example, **Canceled**) specified in the **Delinquency Process Canceled Status** attribute of the delinquency process preference. For more information on how the delinquency process is automatically canceled, see Canceling a Delinquency Process on page 4170. This scenario is valid only for the fully insured individual business. This scenario is addressed only when such delinquency processes are automatically canceled through the **C1-DPMON** batch.
- If a payment or an adjustment is made when a delinquency process is in the **Completed** status, no action takes place on the debt notification delinquency process.

However, if the payment or adjustment is canceled due to any reason, the system executes the **C1-CDPPAYCAN** or **C1-DPADJCAN** algorithm attached to the customer class or adjustment type, respectively, to resume the delinquency process. For more information on how the delinquency process is automatically resumed, see Resuming a Delinquency Process on page 4171.

Note:

If a payment or an adjustment is canceled when a debt notification delinquency process is in the **Completed** status, no action takes place on the debt notification delinquency process.

The system considers the delinquency process preference which is specified in the **Delinquency Process Field Mapping** option type of the **DELINPROC** feature configuration. For more information about the feature configuration, see Setting the DELINPROC Feature Configuration on page 4442.

Debt Collection Letters Delinquency Process

There might be scenarios wherein the group, direct billed group membership, or individual customers fail to pay premium for their policy plan or health plan coverage, respectively, even after sending continuous reminders through To Do notifications. In such scenarios, you may want to send them dunning or warning letters (i.e. delinquency notices). Oracle Revenue Management and Billing enables you to send one or more warning or dunning letters via customer contact to:

- Parent Customer, Bill Group, and/or Billing accounts when the delinquency process is created for a person
- All the persons (that can receive notification) associated with the account when the delinquency process is created for an account

To create a delinquency process to send warning or dunning letters, you need to design the delinquency process type using which you want to create the delinquency process in a particular manner.

The following table illustrates how you can design the delinquency process type using which you want to create the delinquency process to send warning or dunning letters.

Delinquency Process Type	Delinquency Event Type	System Event	Algorithm	Algorithm Purpose
DP1	Send First Reminder Notification	Event Activation	C1-DLQCRTODO	Creates a To Do using the given To Do type
	Send a Warning Letter	Event Activation	C1-DLQSENDCC1	Sends a warning letter via a customer contact
		Monitor Completed Event	C1-RCLTRGDMD	Recalculates trigger dates for remaining

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Delinquency Process Type	Delinquency Event Type	System Event	Algorithm	Algorithm Purpose
				events based on document mail date
	Send a Dunning Letter	Event Activation	C1-DLQSENDCC2	Sends a dunning letter via a customer contact
DP2	Send a Warning Letter	Event Activation	C1-DLQSENDCC1	Sends a warning letter via a customer contact
	Recalculate Trigger Dates	Monitor Completed Event	C1-RCLTRGDMD	Recalculates trigger dates for remaining events based on document mail date
	Send a Dunning Letter	Event Activation	C1-DLQSENDCC2	Sends a dunning letter via a customer contact
DP3	Send a Warning Letter	Event Activation	C1-DLQSENDCC1	Sends a warning letter via a customer contact
	Send a Dunning Letter	Event Activation	C1-DLQSENDCC2	Sends a dunning letter via a customer contact

The **C1-DLQSENDCC** algorithm is shipped with the product. You can create different algorithms (for example, **C1-DLQSENDCC1** and **C1-DLQSENDCC2**) using the **C1-DLQSENDCC** algorithm type when you want to send different debt collection letters at different intervals. Note that sending a To Do notification before sending debt collection letters through a delinquency process is optional. You may or may not include these To Do notification event types while designing a delinquency process type to send debt collection letters. In addition, the **C1-RCLTRGDMD** algorithm attached to the **Monitor Completed Event** system event is optional. If required, you can recalculate the trigger dates for the remaining events in the delinquency process based on document mail date. For more information about these algorithms, see C1-DLQSENDCC on page 4089 and C1-RCLTRGDMD on page 4097.

Note: You can attach an algorithm to either or both of the system events (i.e. **Event Activation** and **Monitor Completed Event**) in a delinquency event type.

Once a delinquency process is created for a person or an account to send debt collection letters, the status of the delinquency process is set to the value (for example, **Initiated**) specified in the **Delinquency Process Initiated Status** attribute of the delinquency process preference. Once the first event in the delinquency process is triggered, the status of the delinquency process is changed to the value (for example, **Delinquency In Progress**) specified in the **Delinquency Process InProgress Status** attribute of the delinquency process preference. A customer contact may be created when the first or subsequent event is triggered in the delinquency process. For more information about the person to whom a customer contact is sent, see C1-DLQSENDCC on page 4089. If the member level notification needs to be sent to all the derived group, direct billed group membership, or individual memberships, the system also creates a customer contact for the main subscriber of each membership. For more information about the member level notifications, see Creating Customer Contacts for Each Membership Billed to Delinquent Customer or Account on page 4188. Once all the required customer contacts are created, the status of the delinquency event is changed to **Completed**. Once all the delinquency events are triggered successfully, the status of the delinquency process is changed to the value (for example, **Completed**) specified in the **Delinquency Process Completed Status** attribute of the delinquency process preference.

The system may receive a payment or an adjustment against the overdue bill for which a delinquency process is created to send debt collection letters. In such case, the system behaves in the following manner depending on the status of the delinquency process:

- If a payment or an adjustment is made when a delinquency process is in the **Initiated**, **Delinquency In Progress**, or **On Hold** status, the status of the delinquency process is changed to the value (for example, **Canceled**) specified in the **Delinquency Process Canceled Status** attribute of the delinquency process preference. For more information on how the delinquency process is automatically canceled, see Canceling a Delinquency Process on page 4170

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- If a payment or an adjustment is made when a delinquency process is in the **Pending Termination** status, the status of the delinquency process is changed to the value (for example, **Canceled**) specified in the **Delinquency Process Canceled Status** attribute of the delinquency process preference. For more information on how the delinquency process is automatically canceled, see Canceling a Delinquency Process on page 4170. This scenario is valid only for the fully insured individual business. This scenario is addressed only when such delinquency processes are automatically canceled through the **C1-DPMON** batch.
- If a payment or an adjustment is made when a delinquency process is in the **Completed** status, no action takes place on the debt collection letters delinquency process.

However, if the payment or adjustment is canceled due to any reason, the system executes the **C1-CDPPAYCAN** or **C1-DPADJCAN** algorithm attached to the customer class or adjustment type, respectively, to resume the delinquency process. For more information on how the delinquency process is automatically resumed, see Resuming a Delinquency Process on page 4171.

Note:

If a payment or an adjustment is canceled when a debt collection letters delinquency process is in the **Completed** status, no action takes place on the debt collection letters delinquency process.

The system considers the delinquency process preference which is specified in the **Delinquency Process Field Mapping** option type of the **DELINPROC** feature configuration. For more information about the feature configuration, see Setting the DELINPROC Feature Configuration on page 4442

Individual Membership Cancellation Delinquency Process

There might be scenarios wherein the individual customers fail to pay the binder payment for their health plan coverage. As a result, their individual memberships cannot be activated in the system. Such individual memberships should be canceled in the system in a timely manner. To adhere to this requirement, you can now configure the system such that a delinquency process is created for the individual membership's account to send a cancellation outbound message to the enrollment system when the payment for the first bill (i.e. binder payment) is not made within the due date. This enables you to initiate the cancellation process for an individual membership through the **Delinquency Management** feature. Only when an inbound message is received from the enrollment system to cancel an individual membership, the system changes the status of the individual membership to **Canceled**.

To create a delinquency process to initiate cancellation request for an individual membership through an outbound message, you need to design the delinquency process type using which you want to create the delinquency process in a particular manner.

Delinquency Process Type	Delinquency Event Type	System Event	Algorithm	Algorithm Purpose
DP1	Update Individual Membership Cancellation Reason	Event Activation	C1-DLEVMBCNC	Updates the status reason of the individual memberships billed to the delinquent account

You need to attach the **C1-DLEVMBCNC** algorithm to initiate cancellation request for individual memberships billed to the delinquent account. The **C1-DLEVMBCNC** algorithm updates the status reason of the individual memberships which are billed to the delinquent account. It considers the status reason which is specified in the **Awaiting Membership Cancellation Reason** attribute of the delinquency process preference. Before updating the status reason of the individual membership, the system validates whether the status reason is defined for the **Active** status of the **C1-IndMembership** business object. For more information about this algorithm, see C1-DLEVMBCNC on page 4094.

Once a delinquency process is created for an account, the status of the delinquency process is set to the value (for example, **Initiated**) specified in the **Delinquency Process Initiated Status** attribute of the delinquency process preference. Once the first event in the delinquency process is triggered, the status of the delinquency process is changed to the value (for example, **Delinquency In Progress**) specified in the **Delinquency Process InProgress Status** attribute

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of the delinquency process preference. Once the status reason of the active individual memberships is updated, the status of the delinquency event is changed to **Complete**. If all the events in the delinquency process are triggered successfully, the status of the delinquency process is changed to the value (for example, **Completed**) specified in the **Delinquency Process Completed Status** attribute of the delinquency process preference. However, if there are any more events that are yet to be triggered, the status of the delinquency process remains as **Delinquency In Progress**.

You need to then execute the **C1-MTOMT** batch to generate the cancellation outbound messages for the individual memberships. For more information about the batch, see to the Outbound Message Generation for Delinquency Management on page 4189. Before creating the cancellation outbound messages for the individual memberships, you need to setup some pre-requisites for the cancellation outbound message generation. For more information about the pre-requisites, see Membership Cancellation Outbound Message on page 4182.

Once the cancellation outbound message is sent to the enrollment system, you need to wait for the enrollment system to send the inbound message to cancel the individual membership in ORMB. Once the inbound message to cancel an individual membership is processed, the status of the individual membership is changed to **Canceled**. Once the individual membership is canceled in ORMB, the status of the delinquency process is changed to the value (for example, **Canceled**) specified in the **Delinquency Process Canceled Status** attribute of the delinquency process preference when the **C1-DPMON** batch is executed.

The system may receive a payment or an adjustment against the overdue bill for which a delinquency process is created to initiate the cancellation request for an individual membership through an outbound message. In such case, the system behaves in the following manner depending on the status of the delinquency process:

- If a payment or an adjustment is made when a delinquency process is in the **Initiated**, **Delinquency In Progress**, or **On Hold** status, the status of the delinquency process is changed to the value (for example, **Canceled**) specified in the **Delinquency Process Canceled Status** attribute of the delinquency process preference. For more information on how the delinquency process is automatically canceled, see Canceling a Delinquency Process on page 4170
- If a payment or an adjustment is made when a delinquency process is in the **Pending Termination** status, the status of the delinquency process is changed to the value (for example, **Canceled**) specified in the **Delinquency Process Canceled Status** attribute of the delinquency process preference. For more information on how the delinquency process is automatically canceled, see Canceling a Delinquency Process on page 4170. This scenario is addressed only when such delinquency processes are automatically canceled through the **C1-DPMON** batch.
- If a payment or an adjustment is made when a delinquency process is in the **Completed** status, no action takes place on the individual membership cancellation delinquency process.

However, if the payment or adjustment is canceled due to any reason, the system executes the **C1-CDPPAYCAN** or **C1-DPADJCAN** algorithm attached to the customer class or adjustment type, respectively, to resume the delinquency process. For more information on how the delinquency process is automatically resumed, see Resuming a Delinquency Process on page 4171.

Note:

If a payment or an adjustment is canceled when an individual membership cancellation delinquency process is in the **Completed** status, no action takes place on the delinquency process.

The system considers the delinquency process preference which is specified in the **Delinquency Process Field Mapping** option type of the **DELINPROC** feature configuration. For more information about the feature configuration, see Setting the DELINPROC Feature Configuration on page 4442.

Individual Membership Termination Delinquency Process

There might be scenarios wherein the individual customers fail to pay premium for their health plan coverage even after sending continuous reminders. In such scenarios, you may want to terminate their individual memberships in the system. Oracle Revenue Management and Billing enables you to initiate the termination process for an individual membership through the **Delinquency Management** feature. You can configure the system such that a delinquency process is created for the individual membership's account to send a termination outbound message to the enrollment system when the overdue bills do not meet the tolerance limit. Only when an inbound message is received from the enrollment system to terminate an individual membership, the system changes the status of the individual membership to **Terminated**.

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To create a delinquency process to initiate termination request for an individual membership through an outbound message, you need to design the delinquency process type using which you want to create a delinquency process in a particular manner.

The following table illustrates how you can design the delinquency process type using which you want to create the delinquency process to initiate cancellation request for an individual membership through an outbound message.

Delinquency Process Type	Delinquency Event Type	System Event	Algorithm	Algorithm Purpose
DP1	Send First Reminder Notification	Event Activation	C1-DLQCRTODO	Updates the status reason of the individual memberships billed to the delinquent account
	Send a Warning Letter	Event Activation	C1-DLQSENDCC	Sends a warning letter via a customer contact
	Send a Termination Request	Event Activation	C1-DETTERMDT	Calculates the termination date for an individual membership
		Event Activation	C1-DETTRTGDT	Calculates the termination request date
		Monitor Completed Event	C1-TRNTERTRG	Updates the status of the delinquency process on the termination request date
DP2	Send a Warning Letter	Event Activation	C1-DLQSENDCC	Sends a warning letter via a customer contact
	Calculate Termination Date	Event Activation	C1-DETTERMDT	Calculates the termination date for an individual membership
	Send Termination Request	Event Activation	C1-DETTRTGDT	Calculates the termination request date
		Monitor Completed Event	C1-TRNTERTRG	Updates the status of the delinquency process on the termination request date

Note that sending a To Do notification and a warning or dunning letter before initiating the termination request for an individual membership through a delinquency process is optional. You may or may not include these event types while designing a delinquency process type to initiate termination request for individual memberships billed to the delinquent account. However, you need to attach the **C1-DETTERMDT**, **C1-DETTRTGDT**, and **C1-TRNTERTRG** algorithms to the above-mentioned system events to initiate termination request for an individual membership. For more information about these algorithms, see C1-DETTERMDT on page 4092, C1-DETTRTGDT on page 4096, and C1-TRNTERTRG on page 4097.

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Note:

A delinquency event type where the **C1-DETTRTGDT** and/or **C1-TRNTERTRG** algorithms are attached should be added at the last in the delinquency process type (as shown in the above examples – DP1 and, DP2.

You can attach an algorithm to either or both of the system events (i.e. **Event Activation** and **Monitor Completed Event**) in a delinquency event type.

Once a delinquency process is created for an account, the status of the delinquency process is set to the value (for example, **Initiated**) specified in the **Delinquency Process Initiated Status** attribute of the delinquency process preference. Once the first event in the delinquency process is triggered, the status of the delinquency process is changed to the value (for example, **Delinquency In Progress**) specified in the **Delinquency Process InProgress Status** attribute of the delinquency process preference. After calculating the termination date and termination request date, the status of the respective delinquency events is changed to **Completed**. However, the status of the delinquency process changes to a status which is specified in the **Delinquency Process Pending Termination Status** attribute of the delinquency process preference only on or after the termination request date when the **C1-DPMON** batch is executed. Once the status of the delinquency process is changed to **Pending Termination**, the system executes the **C1-MEMTRMRSN** algorithm attached to the **Pending Termination** status in the lifecycle of the **C1-DelinquencyProcess** business object.

The **C1-MEMTRMRSN** algorithm updates the status reason of the active individual memberships which are billed to the delinquent account. The system considers the active individual memberships depending on the value defined for the **Skip Termination of Guaranteed Available Memberships(Valid Values-Y,N)** parameter. If the **Skip Termination of Guaranteed Available Memberships(Valid Values-Y,N)** parameter is set to **Y**, the system does not consider the active individual memberships where the **Evaluate Guaranteed Availability** flag is set to **true**. However, if the **Skip Termination of Guaranteed Available Memberships(Valid Values-Y,N)** parameter is set to **N**, the system considers the active individual memberships irrespective of whether the **Evaluate Guaranteed Availability** flag is set to **true** or **false**.

If the individual membership's start date is later than the respective termination date, this algorithm does the following:

- Updates the status reason of the individual membership. It considers the status reason which is specified in the **Awaiting Membership Cancellation Reason** attribute of the delinquency process preference. Before updating the status reason of the individual membership, the system validates whether the status reason is defined for the **Active** status of the **C1-IndMembership** business object
- Creates a log entry for each individual membership in the delinquency process

However, if the individual membership's start date is earlier than the respective termination date and if the individual membership's end date is later than the respective termination date, this algorithm does the following:

- Updates the status reason of the individual membership. It considers the status reason which is specified in the **Membership Termination Reason for Delinquency** attribute of the delinquency process preference. Before updating the status reason of the individual membership, the system validates whether the status reason is defined for the **Active** status of the **C1-IndMembership** business object.
- Adds the termination date and termination reason (i.e. status reason) corresponding to the individual membership in the **CI_MEMBERSHIP** table.
- Sets the individual membership's end date to the termination date corresponding to the individual membership in the **CI_MEMBERSHIP** table.
- Creates a log entry in each individual membership indicating that it is terminated due a delinquency process.
- Creates a log entry for each individual membership in the delinquency process.
- Stamps the delinquency process ID as a characteristic using the **C1-DELPO** characteristic type on the individual membership.

Once the status reason of the individual memberships is changed, you need to execute the **C1-MTOMT** batch to generate the cancellation or termination outbound messages for the individual memberships. For more information about the batch, see Outbound Message Generation for Delinquency Management on page 4189. Before creating the cancellation or termination outbound messages for the individual memberships, you need to setup some pre-requisites for the cancellation or termination outbound message generation. For more information about the pre-requisites, see Membership Cancellation Outbound Message on page 4182 and Membership Termination Outbound Message on page 4176, respectively.

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Once the cancellation or termination outbound message is sent to the enrollment system, you need to wait for the enrollment system to send the inbound message request to cancel or terminate the individual membership in ORMB. Once the inbound message to cancel or terminate an individual membership is processed, the status of the individual membership is changed to **Canceled** or **Terminated**, respectively. Once the individual membership is canceled in ORMB, the status of the delinquency process is changed to the value (for example, **Canceled**) specified in the **Delinquency Process Canceled Status** attribute of the delinquency process preference when the **C1-DPMON** batch is executed. Similarly, once the individual membership is terminated in ORMB, the status of the delinquency process is changed to the value (for example, **Customer Terminated**) specified in the **Delinquency Process Terminated Status** attribute of the delinquency process preference when the **C1-DPMON** batch is executed.

Once the status of the delinquency process is changed to Customer Terminated, the system executes the following algorithms (if configured) attached to the respective status of the **C1-DelinquencyProcess** business object:

- **C1-CRDPTERM** - It creates a subsequent delinquency process for the terminated customer. A subsequent delinquency process includes all the unpaid bills which were present in the primary delinquency process through which the individual membership is terminated. In ORMB, the primary delinquency process is referred to as the related delinquency process for the subsequent delinquency process. This algorithm stores the related delinquency process ID in the **REL_DELIN_PROC_ID** column corresponding to the subsequent delinquency process in the **C1_DELIN_PROC** table.
- **C1-DLQCCDPS** - It creates a customer contact to send a letter (for example, a harsh letter) to the terminated customer to communicate any penalty or legal notice on defaulting or delaying payments. If the delinquency process is created for an account, this algorithm checks whether the **Receives Notification** option is selected in the bill routing information of any person associated with the account. If the **Receives Notification** option is selected in the bill routing information of a person, this algorithm creates a customer contact for the person. Note that if the value is specified for the **Account Relationship Type** parameter, this algorithm will consider only those persons who are associated with the account using the given relationship type.

  In addition, this algorithm does the following:

  - Creates a log entry for each customer contact in the delinquency process.
  - Stamps the delinquency process ID as a characteristic using the **C1-DELPO** characteristic type on the customer contact.
  - Stamps the account ID as a characteristic using the given characteristic type on the customer contact.

The system may receive a payment or an adjustment against the overdue bill for which a delinquency process is created to initiate the termination request for an individual membership through an outbound message. In such case, the system behaves in the following manner depending on the status of the delinquency process:

- If a payment or an adjustment is made when a delinquency process is in the **Initiated**, **Delinquency In Progress**, **On Hold**, or **Pending Termination**status, the status of the delinquency process is changed to the value (for example, **Canceled**) specified in the **Delinquency Process Canceled Status** attribute of the delinquency process preference. For more information on how the delinquency process is automatically canceled, see Canceling a Delinquency Process on page 4170. However, if the payment or adjustment is canceled due to any reason, the system executes the **C1-CDPPAYCAN** or **C1-DPADJCAN** algorithm attached to the customer class or adjustment type, respectively, to resume the delinquency process. For more information on how the delinquency process is automatically resumed, see Resuming a Delinquency Process on page 4171.
- If a payment or an adjustment is made when a delinquency process is in the **Customer Terminated** status, you need to wait till an inbound message request is received from the enrollment system to reinstate an individual membership. Once the status of the individual membership is changed to **Active**, the system does the following:

  - Changes the status of the primary delinquency process through which the termination request was initiated to a status (for example, **Customer Reinstated**) which is specified in the **Delinquency Process Customer Reinstated Status** attribute of the delinquency process preference.
  - Changes the status of the subsequent delinquency process to a status (for example, **Canceled**) which is specified in the **Delinquency Process Canceled Status** attribute of the delinquency process preference if it meets the cancel criteria.

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Note that the status of the primary and subsequent delinquency processes is changed only through **C1-DPMON** batch. For more information on how the delinquency process is automatically canceled, see Canceling a Delinquency Process on page 4170.

If the payment or adjustment is canceled due to any reason, the system executes the **C1-RODPDUEPX** or **C1-RODPONADX** algorithm attached to the customer class or adjustment type, respectively, to resume the delinquency process. For more information on how the delinquency process is automatically resumed, see Resuming a Delinquency Process on page 4171.

Note: The system considers the delinquency process preference which is specified in the **Delinquency Process Field Mapping** option type of the **DELINPROC** feature configuration. For more information about the feature configuration, see Setting the DELINPROC Feature Configuration on page 4442.

Advance Deposit Delinquency Process

There might be scenarios wherein the group customers want to settle their unpaid dues using the advance deposit. Oracle Revenue Management and Billing enables you to settle the unpaid bill amount of a person or an account using the advance deposit available at the parent customer or policy level through a delinquency process. Note that this feature is offered only for the fully insured group business.

To create a delinquency process through which you can apply advance deposit to settle the overdue bills of a person or an account, you need to design the delinquency process type using which you want to create the delinquency process in a particular manner.

The following table illustrates how you can design the delinquency process type using which you want to create the delinquency process for applying advance deposit to settle the overdue bills of a person or an account.

Delinquency Process Type	Delinquency Event Type	System Event	Algorithm	Algorithm Purpose
DP1	Apply Advance Deposit	Event Activation	C1-APPADVDEP	Transfers Advance Deposit to Pay Off Overdue Bills

The **C1-APPADVDEP** algorithm is shipped with the product. For more information about the algorithm, see C1-APPADVDEP on page 4094.

Once a delinquency process is created for a person or an account to apply advance deposit to settle the overdue bills, the status of the delinquency process is set to the value (for example, **Initiated**) specified in the **Delinquency Process Initiated Status** attribute of the delinquency process preference. Once the first event in the delinquency process is triggered, the status of the delinquency process is changed to the value (for example, **Delinquency In Progress**) specified in the **Delinquency Process InProgress Status** attribute of the delinquency process preference. The status remains as **Delinquency In Progress** even after the offset request adjustments are created through the first or subsequent event in the delinquency process. On executing the **C1-DPMON** batch, the system checks whether the delinquency process meets the cancel criteria. If so, the system will change the status of the delinquency process to a status (for example, **Canceled**) which is specified in the **Delinquency Process Canceled Status** attribute of the delinquency process preference.

The system may receive a payment or an adjustment against the overdue bill for which an advance deposit delinquency process is created. In such case, the system behaves in the following manner depending on the status of the delinquency process:

- If a payment or an adjustment is made when a delinquency process is in the **Initiated**, **Delinquency In Progress**, or **On Hold** status, the status of debit adjustments (if any) made against the payments, the status of the credit adjustment (if any) used to offset the overdue bills, and the status of the offset request adjustments (if any) is changed to **Canceled**. The status of the delinquency process is changed to the value (for example, **Canceled**) specified in the **Delinquency Process Canceled Status** attribute of the delinquency process preference. In addition, the status of the offset request (if any) is changed to **Unapplied Offset** or **Defer Unapplied**. For more information, see Canceling a Delinquency Process on page 4170 and Notification on Advance Deposit Cancellation on page 4195.

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- If a payment or an adjustment is made when an advance deposit delinquency process is in the **Canceled** status, no action takes place on the advance deposit delinquency process.

However, if the payment or adjustment is canceled due to any reason, the system executes the **C1-CDPPAYCAN** or **C1-DPADJCAN** algorithm attached to the customer class or adjustment type, respectively, to resume the delinquency process. For more information on how the delinquency process is automatically resumed, see Resuming a Delinquency Process on page 4171.

Note:

If a payment or an adjustment is canceled when an advance deposit delinquency process is in the **Canceled** status, no action takes place on the advance deposit delinquency process.

The system considers the delinquency process preference which is specified in the **Delinquency Process Field Mapping** option type of the **DELINPROC** feature configuration. For more information about the feature configuration, see Setting the DELINPROC Feature Configuration on page 4442.

Delinquency Monitoring for a Person or an Account

You need to define a delinquency control for each collection class where the collection method is set to **Self-Control Delinquency**. A new maintenance object named **C1-DELIN-CTR**, a new business object named **C1-DelinControl**, and a new screen named **Delinquency Control** are introduced in this release.

The **Delinquency Control** screen enables you to create, edit, and delete a delinquency control. Note that this screen enables you to define a delinquency control only for those collection classes where the collection method is set to **Self-Control Delinquency**.

A delinquency control enables the system to determine the following:

- A minimum credit review frequency at which the persons or accounts belonging to the respective collection class should be monitored for delinquency. In other words, it indicates in how many days the system should review whether the bills of the persons or accounts are overdue.
- A delinquency monitor rule algorithm that you want to invoke for the collection class while executing the **C1-PRDLQ** or **C1-ACDLQ** batch.

The **C1-DLNQMNRL** algorithm creates a new delinquency process for a person or an account when the person's or account's debt is overdue and does not meet the tolerance limit. Before creating a new delinquency process for a person or an account, it checks whether a delinquency process in the given status already exists for the person or the account. If a delinquency process already exists for the person or the account in the given status, the system will add new overdue bills in the existing delinquency process and will not create a new delinquency process for the person or the account. While adding a bill to an existing delinquency process, the system enables you to create a To Do for the delinquency process.

While executing the **C1-PRDLQ** or **C1-ACDLQ** batch, the system derives the delinquency monitor rule algorithm attached to the delinquency control of the respective collection class for each derived person or account, respectively. This algorithm then determines whether the person's or account's debt should be monitored for delinquency based on their respective credit rating. The system considers the sum of account's credit rating and credit rating threshold (defined in the installation options) to determine whether the account's debt should be monitored for delinquency. However, the system considers the sum of person's credit rating and credit rating threshold (defined in the installation options) to determine whether the person's debt should be monitored for delinquency.

If you specify the value for the **Only Process Customers with Credit Rating Less than or Equal to This Value** parameter, the system checks whether person's or account's credit rating is less than or equal to the specified value. If the person's or account's credit rating is greater than the specified value, the system does not monitor the person's or account's debt for delinquency. However, if the person's or account's credit rating is less than or equal to the specified value or if the value is not specified for the **Only Process Customers with Credit Rating Less than or Equal to This Value** parameter, the system monitors the person's or account's debt for delinquency.

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While monitoring the account's debt for delinquency, this algorithm fetches all the completed bills of the account which are unpaid and not yet linked to any delinquency process of the account. Here, the system considers the delinquency process of the account which is in the non-final status. While monitoring the person's debt for delinquency, this algorithm fetches all the unpaid bills of the person's accounts and all the unpaid bills of the child persons' accounts. It considers only those accounts of the person, its child persons, and the child persons' accounts where the collection method in the respective collection class is set to **Parental Delinquency** and not where the collection method in the respective collection class is set to **Self-Control Delinquency** or **Not Eligible for Collection**. In addition, it considers only those child persons who are associated with the parent person using a person relationship type which is not specified in the **Person Relationship Type Exclusion List** parameter. Note that if an active promise to pay exists for an account, the system does not monitor the delinquency of the account.

While fetching the unpaid bills of the accounts, the system checks the following:

- Whether the bill is included in any payment agreement request which is in the non-final status. If the bill is included in any payment agreement request which is in the non final status, the system does not consider the overdue bill for monitoring the person or account's debt. However, if the bill is not included in any payment agreement request which is in the non-final status, the system considers the overdue bill for monitoring the person or account's debt.
- Whether a characteristic using the characteristic type specified in the **Postpone Date Characteristic Type** parameter is defined for a bill. If the postpone overdue review until date is specified for the bill, the system checks whether postpone overdue review date of the bill is later than the batch business date. If the postpone overdue review date of the bill is later than the batch business date, the system does not consider the overdue bill for monitoring the person or account's debt. However, if the postpone overdue review until date is not specified for the bill or if the postpone overdue review date of the bill is earlier than or equal to the batch business date, the system considers the overdue bill for monitoring the person or account's debt.
- Whether the age of a bill is greater than or equal to the value specified in the **Only Process Bills with an Age Greater than or Equal to This value** parameter. The system calculates the age of a bill using the value specified in the **Which Date Determines Age ('D' – Due Date or 'B' – Bill Date)** parameter. If the parameter value is set to **B**, the system calculates the invoice age from the bill date until the system date. However, if the parameter value is set to **D**, the system calculates the invoice age from the bill due date until the system date. If the invoice age is greater than or equal to the value specified in the **Only Process Bills with an Age Greater than or Equal to This value** parameter, the system considers the overdue bill for monitoring the person or account's debt. However, if the invoice age is less than the value specified in the **Only Process Bills with an Age Greater than or Equal to This value** parameter, the system does not consider the overdue bill for monitoring the person or account's debt.

Note that the system validates the former two conditions on both the debit and credit bills of the account. However, the system validates the age of a debit bill and not of a credit bill.

Once the list of overdue bills is finalized, the system derives the original and unpaid amounts for each overdue bill of the person or account whose debt is monitored. While monitoring the debt of an account, the system calculates the following:

- Sum of the unpaid amounts of the account's bills (that meet the above criteria)
- Sum of the original amounts of the account's bills (that meet the above criteria)

However, while monitoring the debt of a person, the system calculates the following:

- Sum of the unpaid amounts of the bills (that meet the above criteria) of the person's derived accounts (including the ones from its hierarchy)
- Sum of the original amounts of the bills (that meet the above criteria) of the person's derived accounts (including the ones from its hierarchy)

While monitoring the debt of a person, the system also checks whether the **Include On Account Payments In Threshold Evaluation - Y/N** parameter is set to **Y** or **N**. If the **Include On Account Payments In Threshold Evaluation - Y/N** parameter is set to **Y**, the system derives all the on account payments which are made against the on account payment contracts. The system considers the on account payment contracts which are created using the contract types that are specified in the **On Account Payment Contract Types** parameter. Once the on account payments (if any) are derived for the person, the system deducts the on account payments of the customer from the total unpaid amount of the customer.

Note that, while calculating the sum of the original amounts, the system considers the **Use Current Revenue Period Billed For Latest Overdue Due Date – Y/N** parameter. If the **Use Current Revenue Period Billed For Latest Overdue Due Date – Y/N** parameter is set to **Y**, the system considers all those financial transactions of the account

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whose coverage start date is earlier than or equal to the bill due date while calculating the total billed (i.e. original) amount. This option helps to handle the scenario wherein an individual short pays by just enough each month but still does not become delinquent. This is because, in this case, the system calculates the unpaid percentage or amount based on the total amount billed for the coverage period rather than the total amount billed for the overdue bills.

Once the total unpaid amount and the total billed amount is calculated for the person or account, the system checks the value of the **Unpaid Amount and Percentage Required ('Y' or 'N')** parameter. If the **Unpaid Amount and Percentage Required ('Y' or 'N')** parameter is set to **Y** or **N**, the system checks the following:

- Total unpaid amount is greater than or equal to the tolerance limit
- Unpaid percentage value (i.e. unpaid amount with respect to original amount) is greater than or equal to the tolerance limit

If the **Unpaid Amount and Percentage Required ('Y' or 'N')** parameter is set to **Y**, the person or account should meet both the above two conditions. The system then considers the person or account as delinquent. However, if the **Unpaid Amount and Percentage Required ('Y' or 'N')** parameter is set to **N**, the person or account should meet either of the above two conditions. The system then considers the person or account as delinquent.

Once the person or account is considered as delinquent, this algorithm creates a new delinquency process using the delinquency process type which is specified in the given delinquency process type preference. You can specify two separate delinquency process type preference – one for the fully insured group business and another for the fully insured individual business. Depending on whether the person or account is linked to policies or individual memberships, the system will accordingly refer the given delinquency process type preference. For more information about the delinquency process type preference, see Delinquency Process Type Preference on page 4282. The status of the new delinquency process is set to the value (for example, **Initiated**) specified in the **Delinquency Process Initiated Status** attribute of the delinquency process preference. Note that if the delinquency process already exists for the person or account in the given status, then the system will add new overdue bills in the existing delinquency process and will not create a new delinquency process for the person or account. While adding a bill to an existing delinquency process, the system enables you to create a To Do for the delinquency process. Once the To Do is created for a delinquency process, the system creates a log entry for the respective delinquency process indicating that a new bill is added to the delinquency process.

Note: The system considers the delinquency process preference which is specified in the **Delinquency Process Field Mapping** option type of the **DELINPROC** feature configuration. For more information about the feature configuration, see Setting the DELINPROC Feature Configuration on page 4442.

In addition, this algorithm adds a log entry for each overdue bill in the delinquency process. This algorithm contains the following parameters:

- **Only Process Customers with Credit Rating Less than or Equal to This Value** – Used when you want to initiate the delinquency process for only those persons or accounts whose credit rating is less than or equal to the specified value. This parameter is optional.
- **Only Process Bills with an Age Greater than or Equal to This value** – Used to specify the number of days. The system considers a bill while monitoring the person or account's debt when its age is greater than or equal to the specified number of days. This parameter is optional.
- **Which Date Determines Age ('D' - Due Date or 'B' - Bill Date)** – Used to indicate whether you want the system to determine the age of the invoice (i.e. bill) using the due date or the bill date. The valid values are **D** and **B**. This parameter is mandatory.
- **Use Current Revenue Period Billed For Latest Overdue Due Date - Y/N** – Used when you want to consider all those financial transactions of the account whose coverage start date is earlier than or equal to the bill due date while calculating the total billed (i.e. original) amount. The valid values are **Y** and **N**. This parameter is optional. If you do not specify the parameter value, by default, it is set to **N**.
- **Include On Account Payments In Threshold Evaluation - Y/N** – Used to indicate whether you want to consider the payments made against the on account contracts of the account while calculating the unpaid amount. The valid values are **Y** and **N**. This parameter is optional. If you do not specify the parameter value, by default, it is set to **N**.
- **On Account Payment Contract Types** – Used to indicate the on account contract types that you want to consider while determining the total unpaid amount. Here, you must specify a contract type which is already defined in

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the system. You can specify maximum twenty comma-separated values for this parameter. This parameter is only required when the **Include On Account Payments In Threshold Evaluation - Y/N** parameter is set to **Y**.

- **Only Process Person/Account with an Unpaid Percentage Greater Than or Equal to This Value** – Used to specify the unpaid percentage value (i.e. unpaid amount with respect to original amount). The system then considers a person or an account as delinquent only when the unpaid percentage of its overdue bills is greater than or equal to the specified value. This parameter is required.
- **Only Process Person/Account with an Unpaid Amount Greater Than or Equal to This Value** - Used to specify the flat unpaid amount. The system then considers a person or an account as delinquent only when the unpaid amount of its overdue bills is greater than or equal to the specified value. This parameter is required.
- **Person Relationship Type Exclusion List** – Used when you do not want to consider the child persons who are associated with the parent person using a particular person relationship type while fetching the unpaid bills from the person's hierarchy. Here, you must specify a person relationship type which is already defined in the system. You can specify maximum 10 comma-separated values for this parameter. This parameter is only applicable for the fully insured group business and not for the fully insured individual business.
- **To Do Entry Required For Delinquency** – Used to indicate whether you want the system to create a To Do when a new overdue bill is added to an existing delinquency process. The valid values are **Y** and **N**. This parameter is mandatory.
- **To Do Type of To Do Entry for Delinquency** – Used to indicate the To Do type using which you want to create the To Do for the existing delinquency process. Here, you must specify a To Do type which is already defined in the system. This parameter is only required when the **To Do Entry Required For Delinquency** parameter is set to **Y**.
- **Delinquency Process Status For Existing Delinquency Process** – Used to specify the status of the delinquency process. The system then checks whether any delinquency process exists for the person or account in the specified status. If so, the system adds a new overdue bill in the respective delinquency process and does not create a new delinquency process for the person or account. You can specify comma-separated values for this parameter. This parameter is mandatory.

  Note: The system allows you to add new bills to a delinquency process when it is in any of the following three statuses – **INITIATED** (i.e. **Initiated**), **INPROGRESS** (i.e. **Delinquency In Progress**), and **HOLD** (i.e. **On Hold**). Therefore, you need to accordingly specify the value in the **Delinquency Process Status For Existing Delinquency Process** parameter.
- **Postpone Date Characteristic Type** – Used to indicate a characteristic type which is used to store the postpone overdue review until date for a bill. Here, you must specify a characteristic type where the characteristic entity is set to **Bill**. The **ADMRVWDT** characteristic type is shipped with the product. This parameter is optional.

  Note: You have an option to set the specified characteristic type on the bill if you want to postpone the overdue review date of the bill. If the specified characteristic type is defined on the unpaid bill and if the postpone overdue review until date is later than the batch business date, the system does not consider the overdue bill for monitoring the person or account's debt.
- **Unpaid Amount and Percentage Required ('Y' or 'N')** – Used to indicate whether you want to consider both the unpaid amount and the unpaid percentage to check whether the person or account is delinquent. The valid values are:
  - **Y** - If you set the value to **Y**, the system considers both the unpaid amount and the unpaid percentage to check whether the person or account is delinquent.
  - **N** - If you set the value to **N**, the system considers either the unpaid amount or the unpaid percentage to check whether the person or account is delinquent.

  This parameter is mandatory.
- **Delinquency Process Type Field Mapping – Individual** – Used to specify a preference where the preference category is set to **Delinquency Process Type**. The system uses the preference to determine the delinquency process type using which the delinquency process should be created for an account to which individual memberships are billed. This parameter is mandatory. It is not applicable for the fully insured group business. For more information about the delinquency process type preference, see Delinquency Process Type Preference on page 4282.
- **Delinquency Process Type Field Mapping – Group** – Used to specify a preference where the preference category is set to **Delinquency Process Type**. The system uses the preference to determine the delinquency process type using which the delinquency process should be created for a person or an account to which policies are billed. This

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parameter is mandatory. It is not applicable for the fully insured individual business. For more information about the delinquency process type preference, see Delinquency Process Type Preference on page 4282.

Delinquency Event Type

Once you create a delinquency control for each collection class where the collection method is set to **Self-Control Delinquency**, you need to create the required delinquency event types using which you want the system to create delinquency events in the delinquency process. If an account is delinquent, you may want to send different kinds of letters such as dunning letter, warning letter, etc., send a To Do notification, initiate the termination or cancellation request for the individual memberships which are billed to the delinquent account, or initiate the termination or reinstatement request for the policies which are billed to the delinquent account. However, if a person is delinquent, you may want to send different kinds of letters such as dunning letter, warning letter, etc., send a To Do notification, or initiate the termination or reinstatement request for the policies which are billed to the delinquent person. The system enables you to send different kinds of letters, send To Do notification, or initiate the termination, cancellation, or reinstatement request by triggering different delinquency events at predefined intervals in the delinquency process.

A new maintenance object named **C1-DLQ-EV-TP** and a new business object named **C1-DelinEventType** are introduced to create the delinquency event types. The **Delinquency Event Type** screen enables you to create, edit, delete, and copy a delinquency event type. A delinquency event type enables the system to determine the following:

- The primary actions that you want to perform when the delinquency event of the respective delinquency event type is triggered manually (on or before the trigger date from the user interface) or automatically (on the trigger date through the **C1-DPMON** batch). For example, a primary action can be sending a letter, sending a To Do notification, initiating a cancellation, termination, or reinstatement request, etc. You can configure the system to perform the primary actions on the **Event Activation** system event.
- The secondary actions are those actions that you want to perform when the primary actions are completed. For example, a secondary action can be changing the delinquency process status, recalculating the trigger dates of the remaining events in the delinquency process, etc. You can configure the system to perform the secondary actions on the **Monitor Completed Event** system event.

Note that you can attach an algorithm to either or both of the system events while defining a delinquency event type. Once the algorithms attached to the **Event Activation** system event are executed, the status of the delinquency event is changed to **Completed**. The algorithms attached to the **Monitor Completed Event** system event are not executed in the online mode when the status of the current or prior delinquency event is changed to **Completed**. These algorithms are triggered when you execute the **C1-DPMON** batch.

Whenever you manually execute the subsequent events (non-first event) in the delinquency process, the system first checks whether the algorithms attached to the **Monitor Completed Event** system event of the previous delinquency event is successfully executed or not. If an algorithm attached to the **Monitor Completed Event** system event of the previous delinquency event is not executed successfully, the system displays a warning message that indicates the previous event's monitoring algorithms are not executed successfully and confirms whether you want to continue in such scenario. If you click **Yes**, the system ignores the previous event's monitoring algorithm and executes the algorithms attached to the **Event Activation** system event of the current delinquency event (which is triggered). However, if you click **No**, the system does not execute the algorithms attached to the **Event Activation** system event of the current delinquency event. Note that if there are no algorithms attached to the **Monitor Completed Event** system event of the previous delinquency event, the system will directly execute the algorithms attached to the **Event Activation** system event of the current delinquency event.

Delinquency Event Activation

The following table lists the primary actions that you can perform using the respective algorithm shipped with the product:

Action	Algorithm	Algorithm Description
Create a To Do Notification	C1-DLQCRTODO	See C1-DLQCRTODO on page 4089

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Action	Algorithm	Algorithm Description
Send Letter via Customer Contact	C1-DLQSENDCC	See C1-DLQSENDCC on page 4089
Calculate Termination Date	C1-DETTERMDT	See C1-DETTERMDT on page 4092
Send Termination Request	C1-DETTRTGDT	See C1-DETTRTGDT on page 4096
Send Cancellation Request	C1-DLEVMBCNC	See C1-DLEVMBCNC on page 4094
Apply Advance Deposit	C1-APPADVDEP	See C1-APPADVDEP on page 4094

C1-DLQCRTODO

This algorithm creates a To Do for the following:

- Person (i.e. parent customer or bill group) when the delinquency process is created for a person
- Main customer of the account when the delinquency process is created for an account

It also creates a log entry for each To Do notification in the delinquency process. This algorithm is invoked when the event is triggered manually from the user interface or automatically through the **C1-DPMON** batch.

You can use this algorithm in a delinquency process type using which you want to create a delinquency process through which To Do notifications are sent to the delinquent customer or account. It should be attached to the delinquency event type which sends a To Do notification to the person or the main customer of the account.

Note: Once a To Do notification is created, a record is added in the**C1_DELIN_PROC_EVT_NOTIF** table where the**DP_EVT_NOTIF_TYPE_FLG** column is set to TO DO and the **DP_EVT_NOTIF_ID** column is set to the To Do Entry ID.

This algorithm contains the following parameters:

- **To Do Role Person** – Used to indicate that users with the specified To Do role must receive the To Do notification when the delinquency process is created for a person. This parameter is optional. If you do not specify this parameter, the system considers the default To Do role associated with the To Do type. This parameter is only applicable for the fully insured group business.
- **To Do Type Person** – Used to indicate the To Do type using which you want to create a To Do when the delinquency process is created for a person. The **C1-DLQEV** To Do type is shipped with the product to create To Dos for the person level delinquency process. This parameter is mandatory. This parameter is only applicable for the fully insured group business.
- **To Do Role Account** – Used to indicate that users with the specified To Do role must receive the To Do notification when the delinquency process is created for an account. This parameter is optional. If you do not specify this parameter, the system considers the default To Do role associated with the To Do type. This parameter is applicable for both the fully insured group and fully insured individual businesses.
- **To Do Type Account** – Used to indicate the To Do type using which you want to create a To Do when the delinquency process is created for an account. The **C1-DLQAC** To Do type is shipped with the product to create To Dos for the account level delinquency process. This parameter is mandatory. This parameter is applicable for both the fully insured group and fully insured individual businesses.

C1-DLQSENDCC

This algorithm creates a customer contact to send a letter (for example, dunning letter, warning letter, etc.). If the delinquency process is created for a person, this algorithm checks whether the **Notify Group Customer Or Bill Groups Or Bill Accounts** parameter is set to **PG**, **BG**, or **BA**. Depending on the value defined for the **Notify Group Customer Or Bill Groups Or Bill Accounts** parameter, this algorithm does the following:

- If the **Notify Group Customer Or Bill Groups Or Bill Accounts** parameter is set to **PG**, this algorithm checks whether the person type of the person is set to **Parent Customer** or **Bill Group**. If the person type of the person is set to **Parent Customer**, this algorithm creates a customer contact for the parent customer. However, if the person

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type of the person is set to **Bill Group**, this algorithm derives the parent customer of the bill group (using the **Person Relationship Type** option type of the **C1-ASOBLLNG** feature configuration) and then creates a customer contact for the parent customer.

- If the **Notify Group Customer Or Bill Groups Or Bill Accounts** parameter is set to **BG**, this algorithm checks whether the person type of the person is set to **Parent Customer** or **Bill Group**. If the person type of the person is set to **Parent Customer**, this algorithm creates a customer contact for the parent customer and for all those bill groups of the parent customer who are associated with the parent customer using the relationship type which is specified in the **Person Relationship Type** option type of the **C1-ASOBLLNG** feature configuration.

  However, if the person type of the person is set to **Bill Group**, this algorithm derives the parent customer of the bill group (using the **Person Relationship Type** option type of the **C1-ASOBLLNG** feature configuration) and then creates a customer contact for the parent customer and for the respective bill group.
- If the **Notify Group Customer Or Bill Groups Or Bill Accounts** parameter is set to **BA**, this algorithm checks whether the person type of the person is set to **Parent Customer** or **Bill Group**. If the person type of the person is set to **Parent Customer**, this algorithm creates a customer contact for each account to which the parent customer and its bill groups are associated as the main customer. The system considers those bill groups of the parent customer who are associated with the parent customer using the relationship type which is specified in the **Person Relationship Type** option type of the **C1-ASOBLLNG** feature configuration. However, if the person type of the person is set to **Bill Group**, this algorithm derives the parent customer of the bill group (using the **Person Relationship Type** option type of the **C1-ASOBLLNG** feature configuration) and then creates a customer contact for each account to which the parent customer and the respective bill group are associated as the main customer.

However, if the delinquency process is created for an account, this algorithm checks whether the **Receives Notification** option is selected in the bill routing information of any person associated with the account. If the **Receives Notification** option is selected in the bill routing information of a person, this algorithm creates a customer contact for the person. Note that if the value is specified for the **Account Relationship Type** parameter, this algorithm will consider only those persons who are associated with the account using the given relationship type. Irrespective of whether the delinquency process is created for a person or an account, this algorithm also checks whether the **Send Membership Level Notification Source** field corresponding to the respective delinquency event type in the respective delinquency process type is set to **Delinquency Process Type** or **Algorithm**. If the **Send Membership Level Notification Source** field is set to **Delinquency Process Type**, this algorithm checks whether the **Send Membership Level Notification** field corresponding to the respective delinquency event type in the respective delinquency process type is set to **Send Membership Level Notification Required** or **Send Membership Level Notification Not Required**.

However, if the **Send Membership Level Notification Source** field is set to **Algorithm**, this algorithm invokes the **C1-DERMLNBR** algorithm attached to the **Send Member Level Notification Option Derivation** system event in the respective delinquency process type. For more information about the algorithm, see C1-DERMLNBR on page 4156. If the value of the **Send Membership Level Notification** field is set to **Send Membership Level Notification Required** either in the delinquency process type or in the business rule depending on the send membership level notification source, this algorithm derives the memberships billed to the delinquent customer or account. It then checks whether the number of memberships derived is less than or equal to the number specified in the **Member Level Notification Deferred Processing Threshold** parameter. If the number of memberships derived is less than or equal to the specified value, this algorithm creates a customer contact for the main subscriber of each derived membership in the real time (i.e. immediately). In addition, the status of the delinquency event is changed to **Complete**.

However, if no value is defined for the **Member Level Notification Deferred Processing Threshold** parameter or if the number of memberships derived is greater than the specified value, this algorithm changes the status of the delinquency event to **Pending Contact Creation**.For more information on how the customer contacts are created at the membership level for such events, see Creating Customer Contacts for Each Membership Billed to Delinquent Customer or Account on page 4188.

In addition, this algorithm does the following:

- Creates a log entry for each customer contact in the delinquency process.
- Stamps the delinquency process ID as a characteristic using the **C1-DELPO** characteristic type on the customer contact.
- Stamps the account ID as a characteristic using the given characteristic type on the customer contact.

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> **Note:**
>
> The account ID is stamped as a characteristic on the customer contact only when either of the following condition is met:
>
> - The delinquency process is created for a person and the **Notify Group Customer Or Bill Groups Or Bill Accounts** parameter is set to **BA**.
> - The delinquency process is created for an account.

- Stamps the membership ID as a characteristic using the given characteristic type on the customer contact.

> **Note:** The membership ID is stamped as a characteristic on the customer contact only when the customer contact is created for the main subscriber of the membership.

This algorithm is invoked when the event is triggered manually from the user interface or automatically through the **C1-DPMON** batch. You can use this algorithm in a delinquency process type using which you want to create a delinquency process through which debt collection letters are sent to the delinquent customer or account. It should be attached to the delinquency event type which sends a warning or dunning letter.

Note: Once a customer contact is created, a record is added in the **C1_DELIN_PROC_EVT_NOTIF** table where the **DP_EVT_NOTIF_TYPE_FLG** column is set to CC and the **DP_EVT_NOTIF_ID** column is set to the customer contact ID.

This algorithm derives the preferred contact method for the customer contact. While deriving the preferred contact method, the algorithm first fetches the main customer's bill route type on the account and then fetches the bill routing method of the bill route type. Once the bill routing method is derived, the system considers the preference which is specified in the **Routing Method – Contact Method Mapping** option type of the **DELINPROC** feature configuration. For more information about the feature configuration, see Setting the DELINPROC Feature Configuration on page 4442.

It then checks whether any preferred contact method is mapped to the bill routing method in the preference. If the preferred contact method is mapped to the bill routing method in the preference, the system stamps it on the customer contact. However, if the preferred contact method is not mapped to the bill routing method in the preference, the system considers the default contact method as the preferred contact method and stamps it on the customer contact.

This algorithm contains the following parameters:

- **Customer Contact Type** – Used to indicate the customer contact type using which you want to create the customer contact. This parameter is mandatory. Here, you must specify a customer contact type with the appropriate letter template depending on the type of letter you want to send to the customer.
- **Customer Contact Class** – Used to indicate the customer contact class to which the customer contact type belongs. This parameter is mandatory.
- **Default Contact Method** – Used to indicate the contact method that you want to use when the preferred contact method cannot be derived for the routing method from the preference. This parameter is mandatory.
- **Notify Group Customer Or Bill Groups Or Bill Accounts** – Used to indicate whether a customer contact should be created for a parent customer, bill group, and/or for each billing account (that meets the criteria). The valid values are:
  - **PG** – Used when you want to create a customer contact only for the parent customer.
  - **BG** – Used when you want to create a customer contact for the parent customer and for the bill groups of the parent customer. If the person type of the person is set to **Parent Customer**, the system creates a customer contact for the parent customer and for all those bill groups that are associated with the parent customer using the relationship type specified in the **Person Relationship Type** option type of the **C1-ASOBLLNG** feature configuration. However, if the person type of the person is set to **Bill Group**, the system creates a customer contact for the parent customer and the respective bill group.
  - **BA** – Used when you want to create a customer contact for the main customer of the account. If the person type of the person is set to **Parent Customer**, the system creates a customer contact for each account to which the parent customer and its bill groups are associated as the main customer. However, if the person type of the person is set to **Bill Group**, the system creates a customer contact for each account to which the parent customer and

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the respective bill group are associated as the main customer. Note that this parameter is only applicable for the fully insured group business.

- **Account Characteristic Type** – Used to indicate the characteristic type using which you want to store the account ID on the customer contact. Here, you must specify a characteristic type where the characteristic entity is set to **Customer Contact**.
- **Membership Characteristic Type** – Used to indicate the characteristic type using which you want to store the membership ID on the customer contact. Here, you must specify a characteristic type where the characteristic entity is set to **Customer Contact**.
- **Account Relationship Type** – Used to indicate the relationship type using which the person is associated with the account. The system will then create the customer contacts only for those persons who are associated with the account using the specified relationship type. This parameter is optional. You can specify maximum ten comma-separated values for this parameter. If you do not specify the parameter value, the system will create customer contacts for all the persons who are associated with the account irrespective of their relationship type. Note that this parameter is only applicable for the fully insured individual business.
- **Member Level Notification Deferred Processing Threshold** – Used to specify the maximum number of memberships for which customer contacts can be created in the real time (i.e. immediately). If the number of memberships billed to the delinquent customer or account exceeds the specified limit, a customer contact is created for the main subscriber of each derived membership in the deferred mode (i.e. through the **C1-MBRNT** batch control).

C1-DETTERMDT

This algorithm is used to calculate the termination date for the policies or individual memberships. This date is sent to the enrollment system through the termination outbound message. This algorithm is invoked when the event is triggered manually from the user interface or automatically through the **C1-DPMON** batch.

You must use this algorithm in a delinquency process type using which you want to create a delinquency process to initiate termination request for a policy or individual membership through an outbound message. It should be attached to the delinquency event type which requests to terminate the following:

- Policies billed to the delinquent person or account
- Individual memberships billed to the delinquent account

It calculates the termination date based on the termination date rule. The system derives the termination date rule using an algorithm which is attached to the **Termination Date Rule Derivation** system event of the delinquency process type.

In addition, this algorithm retrieves the business rules of the **Delinquency Miscellaneous Options Business Rule** category which are effective on the trigger date. Note that the system considers only those effective business rules which are in the **Active** status. Once the effective business rules are identified, the system executes these business rules in the order of their priority.

Once a policy or individual membership meets the criteria defined in the business rule, the system refers the value of either the following parameter depending on the termination date rule (as listed in the below table) for the policy or individual membership from the business rule:

- Add Days to Coverage End Date
- Add Days to Paid Through Date
- Add Months to Paid Through Date
- Add Days to Grace End Date
- Add Days to Date of Processing of Termination Request

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Note:

The system derives the policies using an algorithm which is attached to the **Policies Derivation** system event of the delinquency process type.

The system derives the individual memberships using an algorithm which is attached to the **Memberships Derivation** system event of the delinquency process type.

While deriving an active individual membership, the system considers the status code which is specified in the **Membership Active Status** option type of the **C1-ASOBLLNG** feature configuration. Similarly, while deriving an active policy, the system considers the status code which is specified in the **Policy Active Status** option type of the **C1-ASOBLLNG** feature configuration.

Once the system derives the termination date rule and the required parameter from the delinquency miscellaneous options business rule, the system calculates the termination date for each policy or individual membership in the following manner:

Termination Date Rule is set to…	**Parameter which is used from the business rule…**	**Termination date is set to…**
Latest Billed Coverage End Date	Add Days to Coverage End Date	Latest Billed Coverage End Date (i.e. coverage end date that falls on or prior to the grace end date) + Add Days to Coverage End Date
Latest Due Coverage End Date	Add Days to Coverage End Date	Latest Due Coverage End Date (i.e. coverage end date that falls prior to the latest due date) + Add Days to Coverage End Date
X days After Paid Through Date	Add Days to Paid Through Date	Paid Through Date + Add Days to Paid Through Date
X Months After Paid Through Date	Add Months to Paid Through Date	Paid Through Date + Add Months to Paid Through Date
Month End of Grace Period Start	-	Last Day of Grace Period Start Month
Month End of Termination Letter Creation	-	Last Day of Termination Letter Creation Event Trigger Month
Month End of Termination Request Event	-	Last Day of Send Termination Request Event Trigger Month
X days After Grace End Date	Add Days to Grace End Date	Grace End Date + Add Days to Grace End Date
X days After Termination Request Event	Add Days to Date of Processing of Termination Request	Send Termination Request Event Trigger Date + Add Days to Date of Processing of Termination Request

Note: The system retrieves the grace start date and grace end date of the delinquency process from the **C1_DELIN_PROC** table.

Once the termination date is calculated for each policy or individual membership, the system checks whether the termination date is earlier than the respective policy or individual membership start date. If the termination date is earlier than the respective policy or individual membership start date, the system sets the termination date to the respective policy or individual membership start date. In addition, if the delinquency category of the delinquency process is set to **GRUP**, this algorithm derives the status reason from the **Policy Termination Reason for Delinquency Process** attribute of the delinquency process preference.

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It validates whether the status reason is defined for the **Terminated** status of the **C1-POLICY** business object. Similarly, if the delinquency category of the delinquency process is set to **INDV**, this algorithm derives the status reason from the **Membership Termination Reason for Delinquency** attribute of the delinquency process preference. It validates whether the status reason is defined for the **Active** status of the **C1-IndMembership** business object.

Note: The system considers the delinquency process preference which is specified in the **Delinquency Process Field Mapping** option type of the **DELINPROC** feature configuration. For more information about the feature configuration, see Setting the DELINPROC Feature Configuration on page 4442.

Finally, it stores the terminate date rule, termination date, and the termination reason of each delinquency process corresponding to the record in the **C1_DELIN_PROC** table.

C1-DLEVMBCNC

This algorithm is used to update the status reason of an individual membership when its cancellation process is initiated through a delinquency process. Once the status reason of an individual membership is updated, this algorithm creates a log entry for the respective membership in the delinquency process. This algorithm is invoked when the cancellation event is triggered manually from the user interface or automatically through the **C1-DPMON** batch.

You must use this algorithm in a delinquency process type using which you want to create a delinquency process to initiate cancellation request for an individual membership through an outbound message. It should be attached to the delinquency event type which requests to cancel the individual memberships billed to the delinquent account.

Note:

The system derives the active individual memberships using an algorithm which is attached to the **Memberships Derivation** system event of the delinquency process type.

While deriving an active individual membership, the system considers the status code which is specified in the **Membership Active Status** option type of the **C1-ASOBLLNG** feature configuration. For more information about the feature configuration, see Setting the C1-ASOBLLNG Feature Configuration on page 4417.

After the status reason of an individual membership is updated, the cancellation outbound message is sent to the enrollment system when the **C1-MTOMT**batch is executed.

The system considers the status reason which is specified in the **Awaiting Membership Cancellation Reason** attribute of the delinquency process preference. Before updating the status reason of the individual membership, the system validates whether the status reason is defined for the **Active** status of the**C1-IndMembership** business object.

Note: The system considers the delinquency process preference which is specified in the **Delinquency Process Field Mapping** option type of the **DELINPROC** feature configuration. For more information about the feature configuration, see Setting the DELINPROC Feature Configuration on page 4442.

C1-APPADVDEP

This algorithm transfers the required payment amount from the advance deposit contract to the delinquent bills by creating adjustments. It checks whether the delinquency process is created at the parent customer, bill group, or at the parent customer's or bill groups' account level. It then accordingly derives the parent customer and checks whether the advance deposit level of the parent customer is set to**PG** or **POLI**. If the advance deposit level of the parent customer is set to **PG**, the system derives the advance deposit account and advance deposit contract using the **Advance Deposit Account Relationship Type** and **Advance Deposit Contract Type** attribute, respectively, of the delinquency process preference. It then derives the sum of all the unmatched payments on the advance deposit contract. However, if the advance deposit level of the parent customer is set to **POLI**, the system derives the advance deposit account linked to the policy and the advance deposit contract using the **Advance Deposit Contract Type** attribute of the delinquency process preference. Once the advance deposit account and contract are derived for each policy, the system derives the sum of all the unmatched payments on the advance deposit contract for the respective policy.

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Note: The system considers the delinquency process preference which is specified in the **Delinquency Process Field Mapping** option type of the **DELINPROC** feature configuration. For more information about the feature configuration, see Setting the DELINPROC Feature Configuration on page 4442.

It creates debit adjustments against the unmatched payments on the advance deposit contract and a single credit adjustment of the equivalent amount. The debit adjustments are created using the given debit adjustment type and a credit adjustment is created using the given credit adjustment type.

The debit adjustments are matched against the payment segments and their match event status is set to **Balanced**. The system then creates an offset request using the given offset request type and includes the credit adjustment and delinquent bills in the offset request. It then automatically submits the offset request and creates the offset request adjustments against the credit adjustment and delinquent bills' bill segments. The offset request adjustments which are created against the bill segments are matched to the bill segments and their match event status is set to **Balanced**. The offset request adjustment which is created against the credit adjustment is matched to the credit adjustment and their match event status is set to **Balanced**. Finally, the status of the offset request is set to **Processed**. For more information, see Settling Unpaid Dues Against Advance Deposit through a Delinquency Process on page 4192.

This algorithm also derives the preferred contact method for the customer contact. While deriving the preferred contact method, this algorithm first fetches the main customer's bill route type on the advance deposit account and then fetches the bill routing method of the bill route type. Once the bill routing method is derived, the system considers the preference which is specified in the **Routing Method – Contact Method Mapping** option type of the **DELINPROC** feature configuration. For more information about the feature configuration, see Setting the DELINPROC Feature Configuration on page 4442.

It then checks whether any preferred contact method is mapped to the bill routing method in the preference. If the preferred contact method is mapped to the bill routing method in the preference, the system stamps it on the customer contact. However, if the preferred contact method is not mapped to the bill routing method in the preference, the system considers the default contact method as the preferred contact method and stamps it on the customer contact.

This algorithm creates a customer contact depending on whether the advance deposit is fully or partially utilized to pay the delinquent bills. The customer contact is created for the person or for the main customer of the account depending on whether the delinquency process is created at the person or account level. In addition, the system stamps the delinquency process ID as a characteristic using the given characteristic type on the customer contact and on the advance deposit payments (used for offsetting).

Note: This algorithm is only applicable for the fully insured group business.

This algorithm contains the following parameters:

- **Debit Adjustment Type** – Used to specify the adjustment type using which you want to create the debit adjustments against the payments on the advance deposit contract.
- **Credit Adjustment Type** – Used to specify the adjustment type using which you want to create a credit adjustment that will be used to offset the overdue bills for which the delinquency process is created.
- **Offset Request Type** – Used to specify the offset request type using which you want to create the offset request to offset the credit adjustment against the delinquent bills. Here, you must specify an offset request type where the offset category is set to **Advance Deposit**.
- **Customer Contact Type For Partial Usage Of Deposit** – Used to indicate the customer contact type using which you want to create the customer contact when the advance deposit amount is partially utilized to pay the delinquent bills. Here, you must specify a customer contact type with the appropriate letter template depending on the type of letter you want to send to the customer.
- **Customer Contact Class For Partial Usage Of Deposit** – Used to indicate the customer contact class to which the customer contact type specified in the **Customer Contact Type For Partial Usage Of Deposit** parameter belongs.
- **Customer Contact Type For Depletion Of Deposit** – Used to indicate the customer contact type using which you want to create the customer contact when the advance deposit amount is fully utilized to pay the delinquent bills. Here, you must specify a customer contact type with the appropriate letter template depending on the type of letter you want to send to the customer.
- **Customer Contact Class For Depletion Of Deposit** – Used to indicate the customer contact class to which the customer contact type specified in the **Customer Contact Type For Depletion Of Deposit** parameter belongs.

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- **Default Contact Method** – Used to indicate the contact method that you want to use when the preferred contact method cannot be derived for the routing method from the preference.
- **Delinquency Process Characteristic Type** – Used to indicate the characteristic type using which you want to store the delinquency process ID on the customer contact and payments. Here, you must specify a characteristic type where the characteristic entity is set to **Customer Contact** and **Payment**.

All these parameters are mandatory.

C1-DETTRTGDT

This algorithm is used to calculate the termination request date for the delinquency event. The termination request date is the date when the termination request is initiated for the policies or individual memberships in the system and thereby the termination outbound message is sent to the enrollment system. This algorithm is invoked when the event is triggered manually from the user interface or automatically through the **C1-DPMON** batch.

You must use this algorithm in a delinquency process type using which you want to create a delinquency process to initiate termination request for a policy or individual membership through an outbound message. It should be attached to the delinquency event type which requests to terminate the following:

- Policies billed to the delinquent person or account
- Individual memberships billed to the delinquent account

Note:

The system does the following on the termination request date when you execute the **C1-DPMON** batch:

- Changes the status of the delinquency process to the status (for example, **Pending Termination**) which is specified in the **Delinquency Process Pending Termination Status** attribute of the delinquency process preference.
- Updates the status reason of the individual memberships billed to the delinquent account.
- Updates the status of the policies billed to the delinquent person or account.

After the status reason of an individual membership is updated, the termination outbound message is sent to the enrollment system when the **C1-MTOMT** batch is executed. On the other hand, after the status of the policy is updated, the termination outbound message is immediately sent to the enrollment system.

The system considers the delinquency process preference which is specified in the **Delinquency Process Field Mapping** option type of the **DELINPROC** feature configuration. For more information about the feature configuration, see Setting the DELINPROC Feature Configuration on page 4442.

This algorithm calculates the termination request date based on the termination trigger process and termination wait days (required if the **Termination Trigger Process** field is set to **After X Days**). The system derives the value of the **Trigger Termination Process** field and termination wait days from the delinquency process type or using an algorithm attached to the **Termination and Reinstatement Configuration Derivation** system event depending on the termination reinstatement configuration source that is specified in the delinquency process type.

The following table explains how the termination request date is calculated for the delinquency event when the trigger termination process is set to:

Trigger Termination Process is set to…	Termination Request Date is set to…
Immediate	Send Termination Request Event Trigger Date
Month End	Last Day of Send Termination Request Event Trigger Month
After X Days	Send Termination Request Event Trigger Date + Termination Wait Days

Note: The Send Termination Request event trigger date is calculated when you execute the **C1-DPEVL** batch.

Finally, this algorithm stores the termination request date of each delinquency process corresponding to the record in the **C1_DELIN_PROC** table.

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Delinquency Event Completion

The following table lists the secondary actions that you can perform using the respective algorithm shipped with the product:

Action	Algorithm	Algorithm Description
Change the Delinquency Process Status	C1-TRNTERTRG	See C1-TRNTERTRG on page 4097
Recalculate Trigger Dates Based on Document Mail Date	C1-RCLTRGDMD	See C1-RCLTRGDMD on page 4097

C1-TRNTERTRG

This algorithm updates the status of the delinquency process on the termination request date. It is invoked in the **C1-DPMON** batch. The system considers the status which is specified in the **Delinquency Process Pending Termination Status** attribute of the delinquency process preference.

Note:

The termination request date is calculated through the **C1-DETTRTGDT** algorithm.

The system considers the delinquency process preference which is specified in the **Delinquency Process Field Mapping** option type of the **DELINPROC** feature configuration. For more information about the feature configuration, see Setting the DELINPROC Feature Configuration on page 4442.

You must use this algorithm in a delinquency process type using which you want to create a delinquency process to initiate termination request for a policy or individual membership through an outbound message. It should be attached to the delinquency event type which requests to terminate the following:

- Policies billed to the delinquent person or account
- Individual memberships billed to the delinquent account

C1-RCLTRGDMD

This algorithm fetches the customer contact which is created in the delinquency event and then retrieves its document mail date. If multiple customer contacts are created in the delinquency event, the system derives the latest document mail date. It then calculates the additional days required to deliver the document to the individual customer by finding the difference between the document mail date and the customer contact date.

Once the additional days are derived, the system adds the additional days to the remaining events' trigger date and thereby derives the new trigger date for each remaining event in the delinquency process. If the **Consider Work Days** option is selected in the respective delinquency process type, the system ensures that the new trigger date falls on a business day and not on a holiday.

This algorithm is invoked in the **C1-DPMON** batch. You can use this algorithm in a delinquency process type using which you want to create a delinquency process to send debt collection letters. It should be attached to the delinquency event type which sends a warning or dunning letter.

This algorithm contains the following parameters:

- **Document Composition Date Characteristic Type** – Used to indicate the characteristic type which stores the document mail date on the customer contact. This parameter is mandatory. Here, you must specify characteristic type where the characteristic entity is set to **Customer Contact**.
- **Evaluate Document Mail Date For Primary Contact Only** – Used to indicate whether the document mail date should be derived only from the delinquent account's main customer's customer contact. The valid values are **Y** and **N**. If you set the parameter value to **N**, the system derives the document mail date from all persons' customer contacts

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who are associated with the delinquent account and then considers the latest document mail date. This parameter is optional. If you do not specify the parameter value, by default, it is set to **N**.

Collection Class

To introduce a delinquency process at different levels (i.e. person or account) in a person's hierarchy, the following three collection methods are available while defining a collection class:

- **Self-Control Delinquency** - Used when you want to create a distinct delinquency process for a person or an account that belongs to the collection class. You can use this collection method for fully insured group, fully insured individual, and direct billed group membership lines of business.
- **Parental Delinquency** - Used when you want to evaluate the debt of a person or an account that belongs to the collection class while monitoring the parent person's delinquency. You can use this collection method only for the fully insured group business.
- **Not Eligible for Collection** - Used when you want to ignore a person or an account that belongs to the collection class while monitoring the delinquency. You can use this collection method for fully insured group, fully insured individual, and direct billed group membership lines of business.

Let us understand this with the help of an example.

The following table explains how the system behaves when different collection method is used in a collection class to which different types of entity belong:

Entity Type	**Entity**	**Collection Class**	**Collection Method**	**System Behavior…**
Account	A1	CC1	Self-Control Delinquency	• The system creates a distinct delinquency process for the A1 account. • The bills of the A1 account are considered while monitoring the delinquency of the A1 account and not while monitoring the delinquency of the account's main customer or any of its parent person in the hierarchy.
	A2	CC2	Parental Delinquency	• The system does not create a distinct delinquency process for the A2 account. • The bills of the A2 account are considered while monitoring the delinquency of the account's main customer or any of its parent person in the hierarchy.
	A3	CC3	Not Eligible for Collection	• The system does not monitor the delinquency of the A3 account. • The bills of the A3 account are not considered while monitoring the delinquency of the account's main customer or any of its parent person in the hierarchy.
Person	P1	CC4	Self-Control Delinquency	• The system creates a distinct delinquency process for the P1 person. • The bills of the P1's accounts and its child persons' accounts are considered while monitoring the delinquency of the P1 person and not while monitoring the delinquency of any of its parent person in the hierarchy.

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Entity Type	Entity	Collection Class	Collection Method	System Behavior…
	P2	CC5	Parental Delinquency	• If the P2 person has a parent person, the system does not create a distinct delinquency process for the P2 person. The bills of the P2's accounts and its child persons' accounts are considered while monitoring the delinquency of any of its parent person in the hierarchy. • If the P2 person does not have a parent person, the system creates a distinct delinquency process for the P2 person. The bills of the P2's accounts and its child persons' accounts are considered while monitoring the delinquency of the P2 person.
	P3	CC6	Not Eligible for Collection	• The system does not monitor the delinquency of the P3 person. But the system monitors the delinquency of the P3's accounts and its child person's when the collection method in the respective collection class is set to **Self-Control Delinquency**.

Referring Paid through Date in Delinquency Management

Until now, the paid through date stamped on the account was not considered while creating or canceling a delinquency process for the fully insured individual line of business. Now, the **C1-DLNQMNRL** algorithm is enhanced to consider the paid through date stamped on the account. Now, in addition, this algorithm does the following:

- If the paid through date is stamped on the account and paid through date is later than batch business date (i.e., processing date), it skips the account, and its debt is not monitored.
- If the paid through date is stamped on the account and if the overdue bill's max bill segment end date is less than or equal to the paid through date, it skips the respective overdue bill while monitoring the account's debt.

The system then accordingly creates a delinquency process for the account. The paid through date of an account is updated immediately once the bill of the account is completed. There is a need to regularly monitor whether the existing delinquency process of the account should be canceled or not. Therefore, the **C1-CANDELPRC** algorithm is also enhanced to consider the paid through date stamped on the account. Now, in addition, this algorithm does the following when the **C1-DPMON** batch is executed:

- If the paid through date is stamped on the account and paid through date is later than batch business date (i.e., processing date), it cancels the delinquency process of the account with the appropriate cancel reason.

Prerequisites for Individual Delinquency

To setup the individual delinquency feature, you need to do the following:

- Define the required business rules using the following business rule categories:
  - Delinquency Grace Period Business Rule
  - Delinquency Event Attributes Business Rule
  - Delinquency Termination Date Rule Business Rule
  - Delinquency Miscellaneous Options Business Rule

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Note: You can define the above business rules through the **Business Rules** screen.

- Define the required access permissions for the **Account** entity in the delinquency process.
- Define the **Membership Terminate Request (C1-MemberTermRequest)** business object which is used to setup the outbound message type for creating the membership termination request in the XML format.

Note: The outbound message type is configured in the **Membership Termination Outbound Message Trigger (C1-MTOMT)** batch which creates an outbound message whenever the membership termination process request is initiated.

- Define an algorithm of the **C1-EVALDPAPP** algorithm type to evaluate the approval configuration on the delinquency process type when a manual intervention happens in the delinquency process.
- Define the appropriate collection method in the collection class of a person or an account whose overdue debt you want to monitor through the delinquency management. For more information, see Collection Class on page 4098
- Define the required collection methods, such as, **Self-Control Delinquency (SDEL)** and **Parental Delinquency (DELP)** in the **COLL_METH_FLG** lookup field.

Note: You must define a collection class for an account and a person with the respective collection method through the **Collection Class** screen.

The following table describes how you can setup the system for an account or a person based on the respective collection method:

Scenario	System Behavior
A collection class is defined for an **Account** entity where the collection method is set to **Self-Control Delinquency**.	• The account entity has its own delinquency process. • Bills belonging to the respective account are skipped when the person of the respective account is evaluated for delinquency.
A collection class is defined for an **Account** entity where the collection method is set to **Parental Delinquency**.	• The account simply follows the collection class configuration defined for the main person of the account. • Bills belonging to the respective account are considered only when a person or any parent within the person's hierarchy is evaluated for delinquency.
A collection class is defined for a Person entity where the collection method is set to **Self-Control Delinquency**.	• The person entity has its own delinquency process. • Bills belonging to the respective person's account or any account falling under its hierarchy are not considered when any of the parent persons within the hierarchy is evaluated for delinquency. **Note:** When you skip a person from its parent person's delinquency process, the system always skips that particular person along with the hierarchy that resides under that person.

A collection class is defined for a Person entity where the collection method is set to **Parental Delinquency**.	• The person simply follows the collection class configuration defined for its parent person. The system also checks the following conditions:
	  • If a parent person is not defined:
	  • The person entity has its own delinquency process.
	  • Bills belonging to the respective person's account or any account falling under its hierarchy are not considered when any of the parent persons within the hierarchy is evaluated for delinquency.
	  • If a parent person is defined:

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Scenario	System Behavior
	• The person and hierarchy falling under the person is considered under that parent person's delinquency management.

- Define the following fields in the XML schema of the **Health Care Inbound Message (C1-HCInboundMessage)** business object:
  - Collection Class
  - Postpone Credit Review Until
  - Drag Days

Note: You can specify the values for the above fields while creating the health care inbound message.

- Configure the delinquency control along with its respective algorithms in the system.
- Configure the delinquency event type along with its respective algorithms in the system.
- Configure the delinquency process type along with its respective algorithms in the system.
- Define the required field mapping preference categories in the system
  - Routing Method - Contact Method Mapping
  - Delinquency Process Type
  - Delinquency Process
- Define a delinquency process type preference for the fully insured individual and specify the preference code in the **Delinquency Process Type Field Mapping – Individual Membership** parameter of the **C1-DLNQMNRAC** algorithm.
- Attach the **C1-DLNQMNRAC** algorithm to the **Delinquency Monitor Rule** system event in the **Delinquency Control** screen for creating an individual delinquency process at **Account** level.
- Set the rule type category as **Parameter Based** if you have selected **Delinquency Event Type Eligibility** as the rule type usage while defining a rule type.
- Attach the **C1-TRNTERTRG** algorithm to the **Delinquency Monitor Rule** system event in the **Delinquency Event Type** screen for transitioning the delinquency process to pending termination.
- Assign the **Delinquency Process Approval Notification (C1-DPAPR)** To Do type to a To Do role which is also specified as the Submitter and Approval To Do role.
- Define the algorithms of the **C1-DETTERMDT** and **C1-DETTRTGDT** algorithm type as the event activation algorithm if you want to calculate the termination date and termination trigger date in a single event.

Note: To calculate the termination date and termination trigger date separately, you need to configure the above algorithms under respective events separately as the event activation algorithm.

- Define a new characteristic type named **Active Selection Characteristics** and set it as an attribute where the preference category is **Individual Membership**.
- Set the values for the following option types in the **C1-ASOBLLNG** feature configuration:
  - Individual Membership Configurations
  - Membership Active Status
  - Membership Terminated Status
  - Policy Active Status
  - Policy Pending Termination Status
  - Policy Pending Reinstatement Status
- Define the required customer contact type where the **Membership (C1MMBRSH)** characteristic type is mapped in the customer contact type's characteristic type.
- Define the required third party payor for payment agreement purposes.
- Set the default value **Y** for the **Skip Termination of Guaranteed Available Memberships(Valid Values - Y, N)** parameter of the **C1-MEMTRMRSN** algorithm.
- Define values for the **Delinquency Process Field Mapping**, **Policy Characteristic Type for Customer Contact**, and **Routing Method - Contact Method Mapping** option types in the **DELINPROC** feature configuration.

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- Attach the **C1-CDPPAYCAN** and **C1-RODPDUEPX** algorithms to the Algorithm Types for Payment Cancellation System Event on page 4206 system event of a customer class to resume the delinquency process for the respective accounts on the payment cancellation. For more information about the algorithms, see the Resuming a Delinquency Process on Payment Cancellation on page 4171.

Related Topics

For more information on...	See...
How to setup the **DELINPROC** feature configuration	Setting the DELINPROC Feature Configuration on page 4442
How to define a delinquency control	Defining a Delinquency Control on page 4209
How to define a delinquency event type	Defining a Delinquency Event Type on page 4216
How to define a delinquency process type	Defining a Delinquency Process Type on page 4234

Prerequisites for Group Delinquency

To setup the group delinquency feature, you need to do the following:

- Define the required business rules using the following business rule categories:
  - Delinquency Grace Period Business Rule
  - Delinquency Event Attributes Business Rule
  - Delinquency Termination Date Rule Business Rule
  - Delinquency Miscellaneous Options Business Rule

  Note: You can define the above business rules through the **Business Rules** screen.
- Define the required access permissions for the **Account** and **Person** entities in the delinquency process.
- Define a fully insured group customer with the following information:
  - A fully insured group policy using a policy type where the policy category is set to **Fully Insured Group**.
  - Different types of plans defined in a fully insured group policy.
  - Different types of memberships defined for a fully insured group policy plan.
- Define the **Membership Terminate Request (C1-MemberTermRequest)** business object which is used to setup the outbound message type for creating the membership termination request in the XML format.

  Note: The outbound message type is configured in the **Membership Termination Outbound Message Trigger (C1-MTOMT)** batch which creates an outbound message whenever the membership termination process request is initiated.
- Define an algorithm of the **C1-EVALDPAPP** algorithm type to evaluate the approval configuration on the delinquency process type when a manual intervention happens in the delinquency process.
- Define the algorithms of the **C1-DETTERMDT** and **C1-DETTRTGDT** algorithm type as the event activation algorithm if you want to calculate the termination date and termination trigger date in a single event.

  Note: To calculate the termination date and termination trigger date separately, you need to configure the above algorithms under respective events separately as the event activation algorithm.
- Define the appropriate collection method in the collection class of a person or an account whose overdue debt you want to monitor through the delinquency management. For more information, see Collection Class on page 4098
- Define the required collection methods, such as, **Self-Control Delinquency (SDEL)** and **Parental Delinquency (DELP)** in the **COLL_METH_FLG** lookup field.

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Note: You must define a collection class for an account and a person with the respective collection method through the **Collection Class** screen.

The following table describes how you can setup the system for an account or a person based on the respective collection method:

Scenario	System Behavior
A collection class is defined for an **Account** entity where the collection method is set to **Self-Control Delinquency**.	• The account entity has its own distinct delinquency process. • The debt of the account is monitored at predefined system events and the delinquency process is commenced whenever the account's debt is overdue.
	Note: The system creates a delinquency process for an account only when at least one bill of the account is overdue.
A collection class is defined for a **Person** entity where the collection method is set to **Self-Control Delinquency**.	• The person entity has its own distinct delinquency process. • The child person's accounts and its grandchild's accounts are not considered in the parent person's delinquency.
	Note: The system creates a delinquency process for a person only when at least one bill of any account (considered) in its hierarchy is overdue.
A collection class is defined for a **Person** entity where the collection method is set to **Parental Delinquency**.	• The person entity has its own distinct delinquency process. • The persons, child person, and grandchild accounts are considered in the parent person's delinquency. • Any such account in the person's hierarchy where the collection is set to **Self-Control Delinquency** is not considered in the parent person's delinquency.

- Define the following fields in the XML schema of the **Health Care Inbound Message (C1-HCInboundMessage)** business object:
  - Collection Class
  - Postpone Credit Review Until
  - Drag Days

Note: You can specify the values for the above fields while creating the health care inbound message.

- Configure the delinquency control along with its respective algorithms in the system.
- Configure the delinquency event type along with its respective algorithms in the system.
- Configure the delinquency process type along with its respective algorithms in the system.
- Define the required field mapping preference categories in the system
  - Routing Method - Contact Method Mapping
  - Delinquency Process Type
  - Delinquency Process
- Create a delinquency event type for advance deposit, attach the **C1-APPADVDEP** algorithm to the **Event Activation** system event, and configure the delinquency event type while creating a delinquency process type for advance deposit purposes.
- Define values for the **Delinquency Process Field Mapping**, **Policy Characteristic Type for Customer Contact**, and **Routing Method - Contact Method Mapping** option types in the **DELINPROC** feature configuration.
- Define a delinquency process type preference for the fully insured group business and specify the preference code in the **Delinquency Process Type Field Mapping – Group** parameter of the **C1-DLNQMNRL** and **C1-DLNQMNRAC** algorithm.
- Attach the **C1-DLNQMNRL** algorithm to the **Delinquency Monitor Rule** system event in the **Delinquency Control** screen for creating a group delinquency process at **Person** level.

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- Attach the **C1-DLNQMNRAC** algorithm to the **Delinquency Monitor Rule** system event in the **Delinquency Control** screen for creating a group delinquency process at **Account** level.
- Set the rule type category as **Parameter Based** if you have selected **Delinquency Event Type Eligibility** as the rule type usage while defining a rule type.
- Attach the **C1-TRNTERTRG** algorithm to the **Delinquency Monitor Rule** system event in the **Delinquency Event Type** screen for transitioning the delinquency process to pending termination.
- Assign the **Delinquency Process Approval Notification (C1-DPAPR)** To Do type to a To Do role which is also specified as the Submitter and Approval To Do role.
- Set the values for the following option types in the **C1-ASOBLLNG** feature configuration:
  - Membership Active Status
  - Membership Terminated Status
  - Policy Active Status
  - Policy Pending Termination Status
  - Policy Pending Reinstatement Status
- Define the required parameter configurations for the delinquency business rules.
- Define the required customer contact event to create a customer contact.
- To setup the advance deposit feature, define the following entities:
  - Define the required account relationship type and advance deposit contract type in the system.
  - Define the **Advance Deposit Account Relationship Type** and **Advance Deposit Contract Type** field mapping attributes in the **Delinquency Process** field mapping preference.
  - Define an algorithm of the **C1-FIACCPP** algorithm type and attach it to the **Post-Processing** system event of the **C1-AccountBO** business object.
  - Define an algorithm of the **C1-ACTPOSP** algorithm type and attach it to the **Post-Processing** system event of the **C1-AccountBO** business object.
  - Define an algorithm of the **C1-FIPOLPP** algorithm type and attach it to the **Post-Processing** system event of the **C1-POLICY** business object.
  - Define a new offset request type where the offset category is set to **Advance Deposit**.
  - Define an offset request type as a soft parameter in the **C1-APPADVDEP** algorithm.
  - Define the debit adjustment type and credit adjustment as soft parameters in the **C1-APPADVDEP** algorithm and attach both the adjustment types in the **Adjustment Type Profile** tab of the **Contact Type** screen.
  -
- Define the following customer contacts in the system:
  - Configure the **Customer Contact Type**, **Customer Contact Class**, and **Default Contact Method** parameters in the **Advance Deposit Monitor (C1-ADMON)** batch to create a customer contact when the payment is not received.
  - Configure the **Customer Contact Type**, **Customer Contact Class**, and **Default Contact Method** parameters in the **C1-NOTADREC** algorithm to create a customer contact when the advance deposit payment is received.
  - Configure the **Customer Contact Type**, **Customer Contact Class**, and **Default Contact Method** parameters in the **C1-NOTADCAN** algorithm to create a customer contact when the advance deposit payment is canceled.
  - Configure the **Customer Contact Type For Partial Usage Of Deposit**, **Customer Contact Class For Partial Usage Of Deposit** and parameters in the **C1-APPADVDEP** algorithm to create a customer contact when the advance deposit is partially considered.
  - Configure the **Customer Contact Type For Partial Usage Of Deposit**, **Customer Contact Class For Partial Usage Of Deposit**, and **Default Contact Method** parameters in the **C1-APPADVDEP** algorithm to create a customer contact when the advance deposit amount is depleted.
- Define a match type for advance deposit and configure the payment distribution override algorithm (in the match type) using the **C1-MATSATYP** algorithm type.
- Define the required third party payor for payment agreement purposes.
- Attach the **C1-CDPPAYCAN** and **C1-RODPDUEPX** algorithms to the Algorithm Types for Payment Cancellation System Event on page 4206 system event of a customer class to resume the delinquency process for the respective

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accounts on the payment cancellation. For more information about the algorithms, see the Resuming a Delinquency Process on Payment Cancellation on page 4171.

Related Topics

For more information on...	See...
How to setup the **DELINPROC** feature configuration	Setting the DELINPROC Feature Configuration on page 4442
How to define a delinquency control	Defining a Delinquency Control on page 4209
How to define a delinquency event type	Defining a Delinquency Event Type on page 4216
How to define a delinquency process type	Defining a Delinquency Process Type on page 4234

Prerequisites for Direct Billed Group Membership Delinquency Management

To setup the direct billed group membership delinquency feature, you need to do the following:

- Define the required business rules using the following business rule categories:
  - Delinquency Grace Period Business Rule
  - Delinquency Event Attributes Business Rule
  - Delinquency Termination Date Rule Business Rule
  - Delinquency Miscellaneous Options Business Rule

> **Note:** You can define the above business rules through the **Business Rules** screen.

- Define the required access permissions for the **Account** entity in the delinquency process.
- Define an algorithm of the **C1-EVALDPAPP** algorithm type to evaluate the approval configuration on the delinquency process type when a manual intervention happens in the delinquency process.
- Define the appropriate collection method in the collection class of a person or an account whose overdue debt you want to monitor through the delinquency management. For more information, see Collection Class on page 4098
- Define the **Membership Terminate Request (C1-MemberTermRequest)** business object which is used to setup the outbound message type for creating the membership termination request in the XML format.

> **Note:** The outbound message type is configured in the **Membership Termination Outbound Message Trigger (C1-MTOMT)** batch which creates an outbound message whenever the membership termination process request is initiated.

- Define the algorithms of the **C1-DETTERMDT** and **C1-DETTRTGDT** algorithm type as the event activation algorithm if you want to calculate the termination date and termination trigger date in a single event.

> **Note:** To calculate the termination date and termination trigger date separately, you need to configure the above algorithms under respective events separately as the event activation algorithm.

- Define the required collection methods, such as, **Self-Control Delinquency (SDEL)** and **Parental Delinquency (DELP)** in the **COLL_METH_FLG** lookup field.

> **Note:** You must define a collection class for an account and a person with the respective collection method through the **Collection Class** screen.

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The following table describes how you can setup the system for an account or a person based on the respective collection method:

Scenario	System Behavior
A collection class is defined for an Account entity where the collection method is set to **Self-Control Delinquency**.	• The account entity has its own delinquency process. • Bills belonging to the respective account are skipped when the person of the respective account is evaluated for delinquency.
A collection class is defined for an **Account** entity where the collection method is set to **Parental Delinquency**.	• The person entity has its own distinct delinquency process. • The child person's accounts and its grandchild's accounts are not considered in the parent person's delinquency. **Note:** The system creates a delinquency process for a person only when at least one bill of any account (considered) in its hierarchy is overdue.
A collection class is defined for a **Person** entity where the collection method is set to **Self-Control Delinquency**.	• The person entity has its own delinquency process. • Bills belonging to the respective person's account or any account falling under its hierarchy are not considered when any of the parent persons within the hierarchy is evaluated for delinquency. **Note:** When you skip a person from its parent person's delinquency process, the system always skips that particular person along with the hierarchy that resides under that person.

A collection class is defined for a **Person** entity where the collection method is set to **Parental Delinquency**.	• The person simply follows the collection class configuration defined for its parent person. The system also checks the following conditions:
	  • If a parent person is not defined:
	  • The person entity has its own delinquency process.
	  • Bills belonging to the respective person's account or any account falling under its hierarchy are not considered when any of the parent persons within the hierarchy is evaluated for delinquency.
	  • If a parent person is defined:
	  • The person and hierarchy falling under the person is considered under that parent person's delinquency management.

- Define a delinquency process type preference for the fully insured group direct billed membership business and specify the preference code in the **Delinquency Process Type Field Mapping – Direct Billed** parameter of the **C1-DLNQMNRDR** algorithm.
- Define values for the **Delinquency Process Field Mapping**, **Policy Characteristic Type for Customer Contact**, and **Routing Method - Contact Method Mapping** option types in the **DELINPROC** feature configuration.
- Attach the **C1-DLNQMNRDR** algorithm to the **Delinquency Monitor Rule** system event in the **Delinquency Control** screen for creating a fully insured group direct billed membership delinquency process at **Account** level.
- Set the rule type category as **Parameter Based** if you have selected **Delinquency Event Type Eligibility** as the rule type usage while defining a rule type.
- Attach the **C1-TRNTERTRG** algorithm to the **Delinquency Monitor Rule** system event in the **Delinquency Event Type** screen for transitioning the delinquency process to pending termination.
- Assign the **Delinquency Process Approval Notification (C1-DPAPR)** To Do type to a To Do role which is also specified as the Submitter and Approval To Do role.

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- Define a new characteristic type named **Active Selection Characteristics** and set it as an attribute where the preference category is **Individual Membership**.
- Set the default value **Y** for the **Skip Termination of Guaranteed Available Memberships(Valid Values-Y,N)** parameter of the **C1-MEMTRMRSN** algorithm.
- Define the required field mapping preference categories in the system
  - Routing Method - Contact Method Mapping
  - Delinquency Process Type
  - Delinquency Process
- Define the following fields in the XML schema of the **Health Care Inbound Message (C1-HCInboundMessage)** business object:
  - Collection Class
  - Postpone Credit Review Until
  - Drag Days

Note: You can specify the values for the above fields while creating the health care inbound message.

- Set the values for the following option types in the **C1-ASOBLLNG** feature configuration:
  - Individual Membership Configurations
  - Membership Active Status
  - Membership Terminated Status
  - Policy Active Status
  - Policy Pending Termination Status
  - Policy Pending Reinstatement Status
- Configure the delinquency control along with its respective algorithms in the system.
- Configure the delinquency event type along with its respective algorithms in the system.
- Configure the delinquency process type along with its respective algorithms in the system.
- Define the required parameter configurations for the delinquency business rules.
- Define the required customer contact event to create a customer contact.
- Define the required customer contact type where the **Membership (C1MMBRSH)** characteristic type is mapped in the customer contact type's characteristic type.
- Define the required third party payor for payment agreement purposes.
- Attach the **C1-CDPPAYCAN** and **C1-RODPDUEPX** algorithms to the Algorithm Types for Payment Cancellation System Event on page 4206 system event of a customer class to resume the delinquency process for the respective accounts on the payment cancellation. For more information about the algorithms, see the Resuming a Delinquency Process on Payment Cancellation on page 4171.

Related Topics

For more information on...	See...
How to setup the **DELINPROC** feature configuration	Setting the DELINPROC Feature Configuration on page 4442
How to define a delinquency control	Defining a Delinquency Control on page 4209
How to define a delinquency event type	Defining a Delinquency Event Type on page 4216
How to define a delinquency process type	Defining a Delinquency Process Type on page 4234

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Delinquency Event (Automated Process) Status Transition

The following figure graphically indicates how a delinquency event moves from one status to another when the delinquency event trigger mode is configured as automatic:

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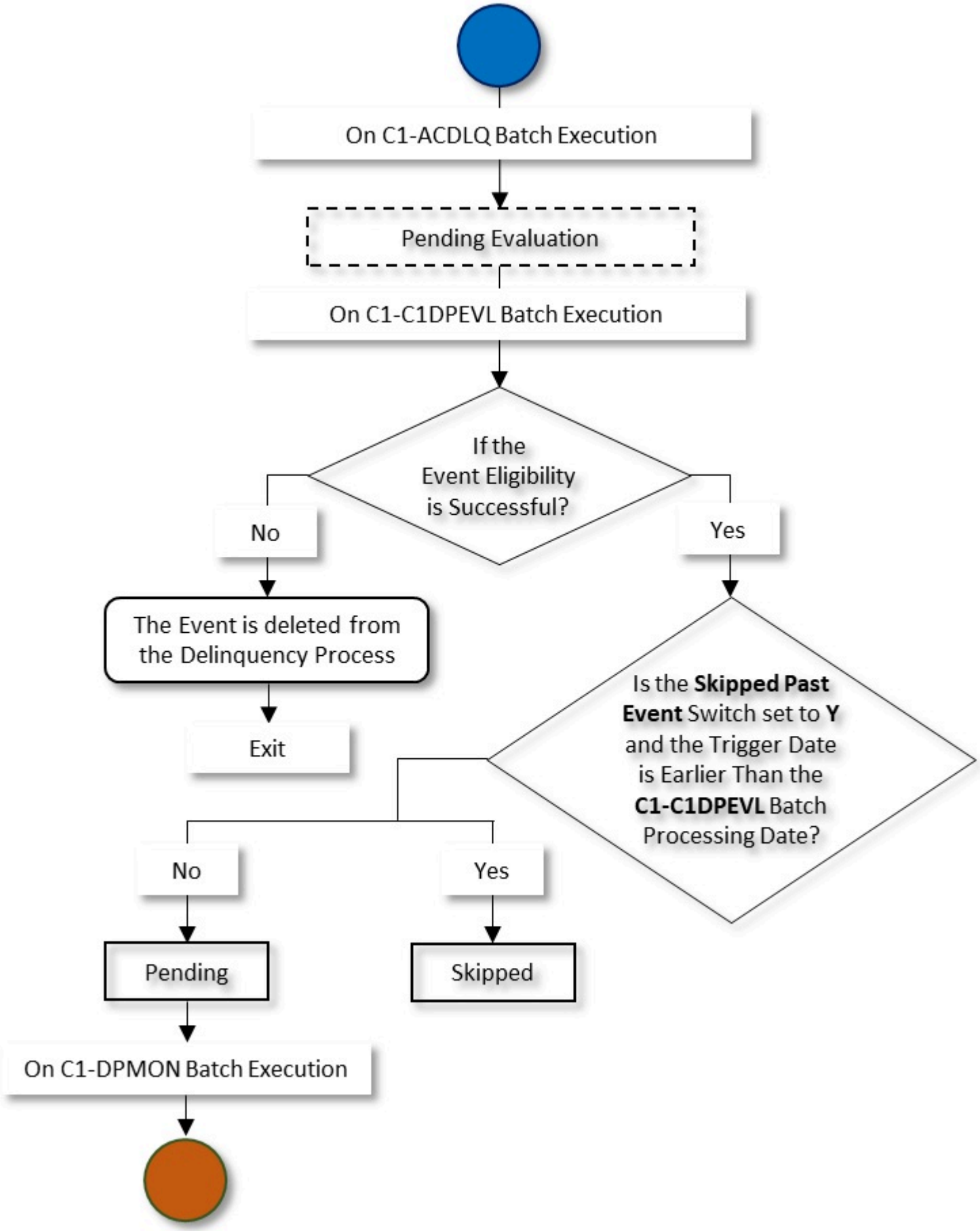

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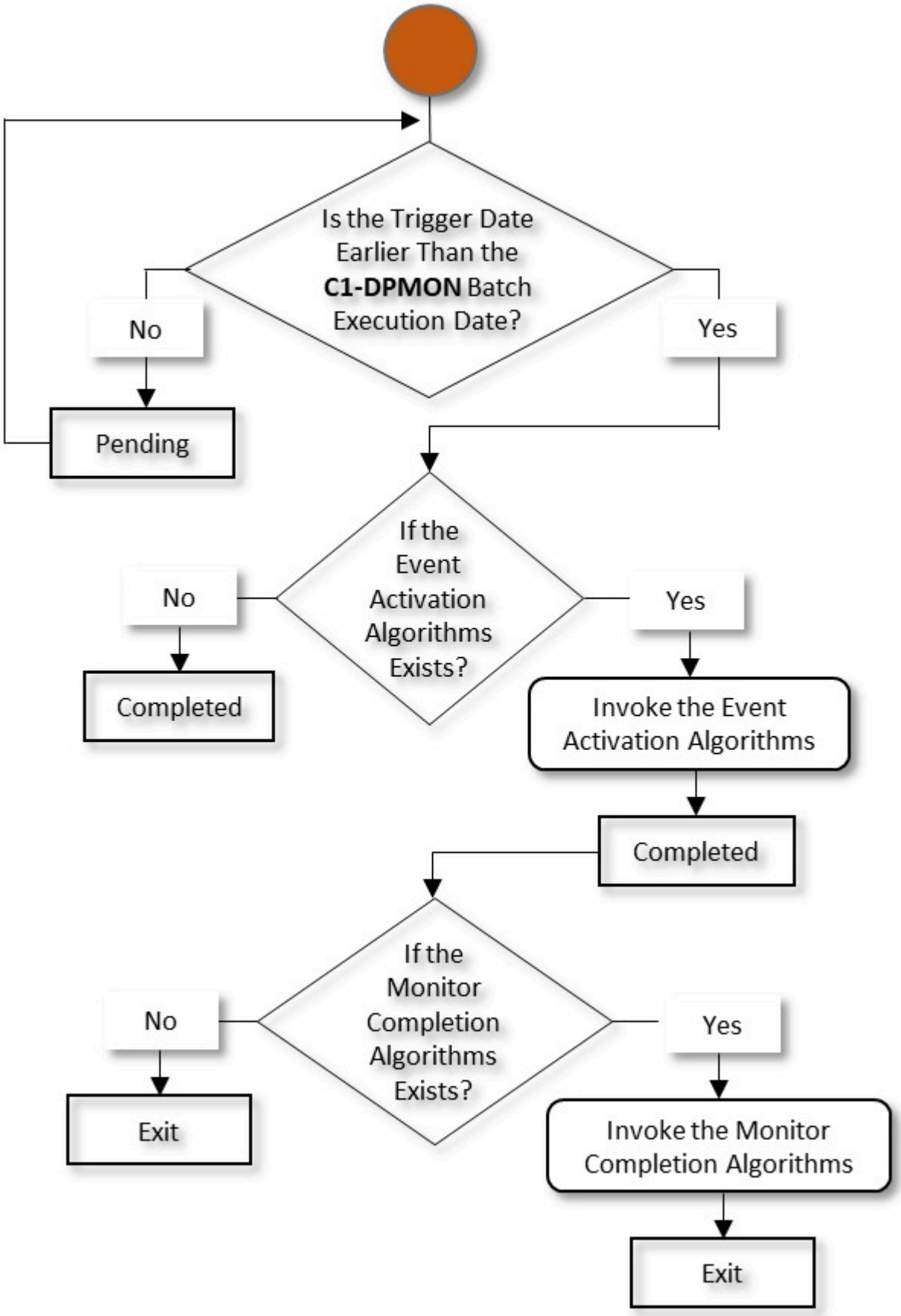

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Delinquency Event (Manual Process) Status Transition

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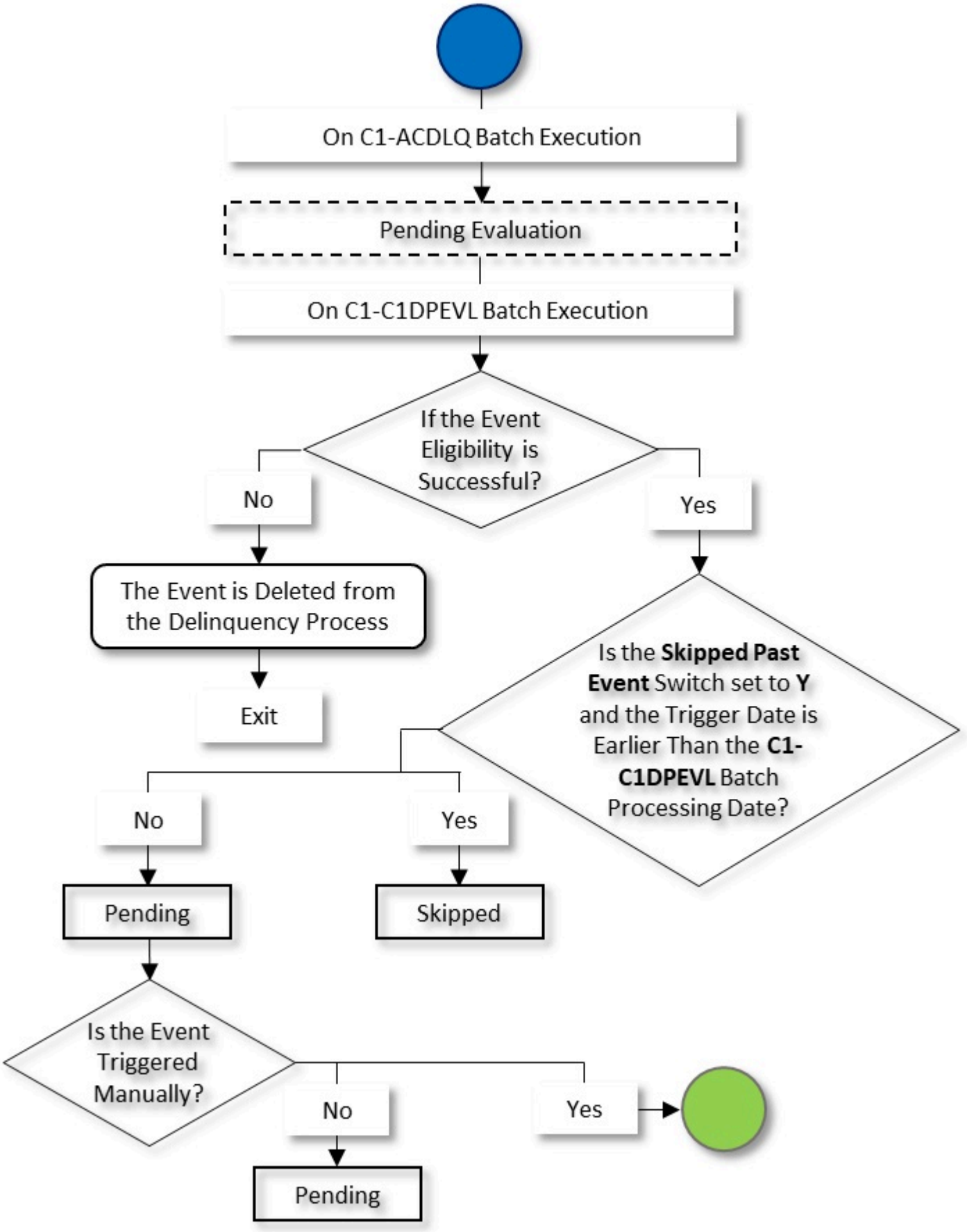

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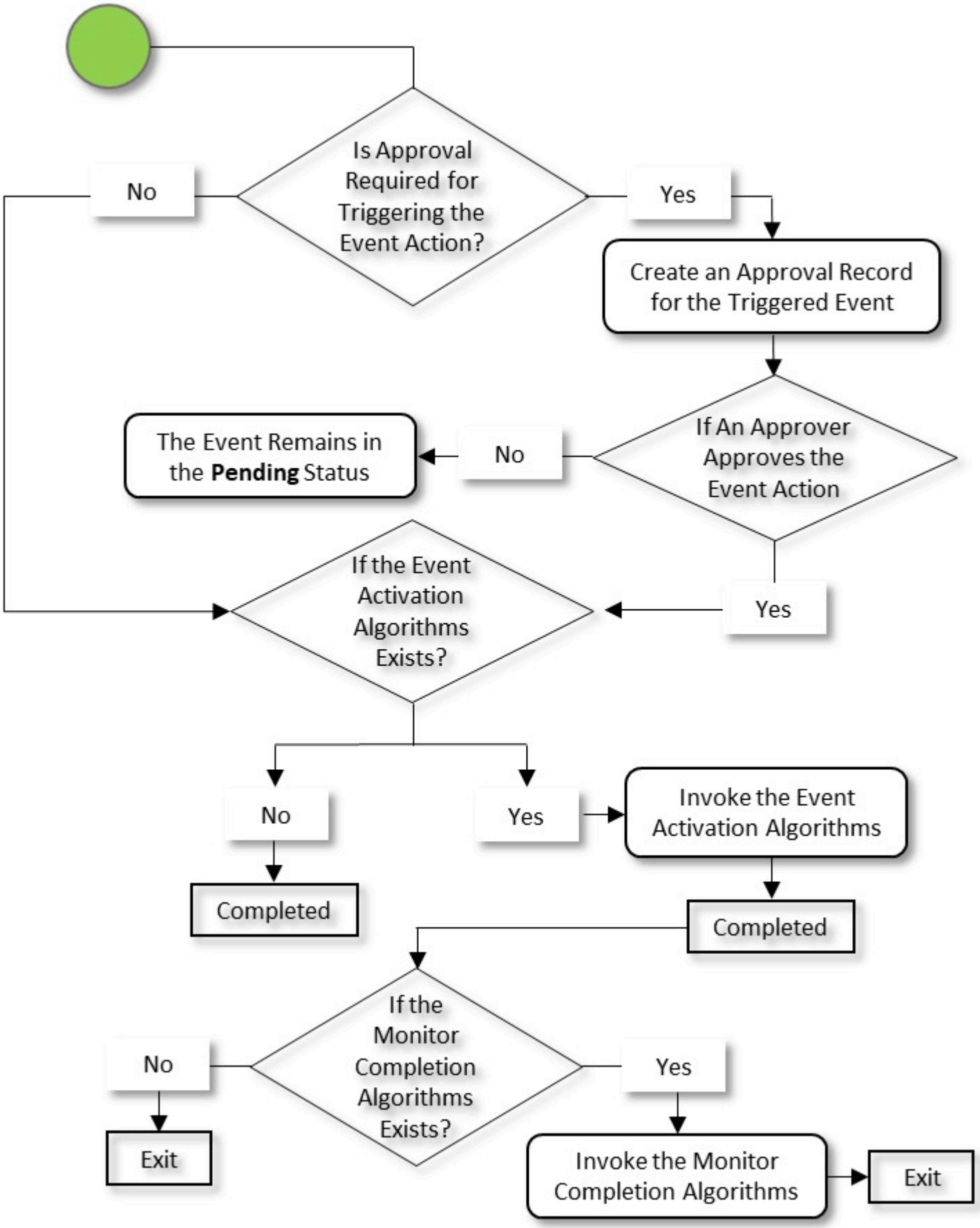

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Delinquency Event (Manual or Automatic Process) Status Transition

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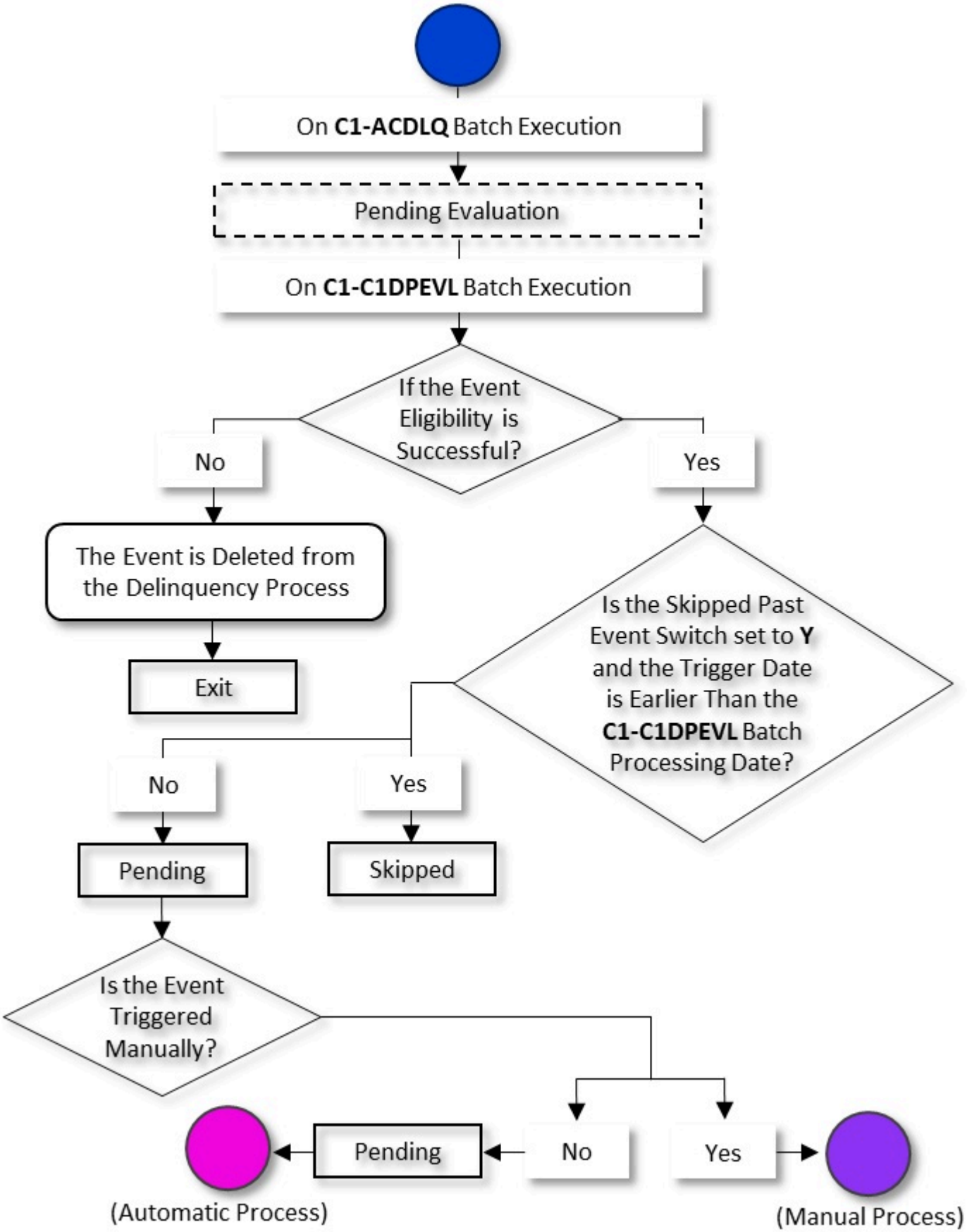

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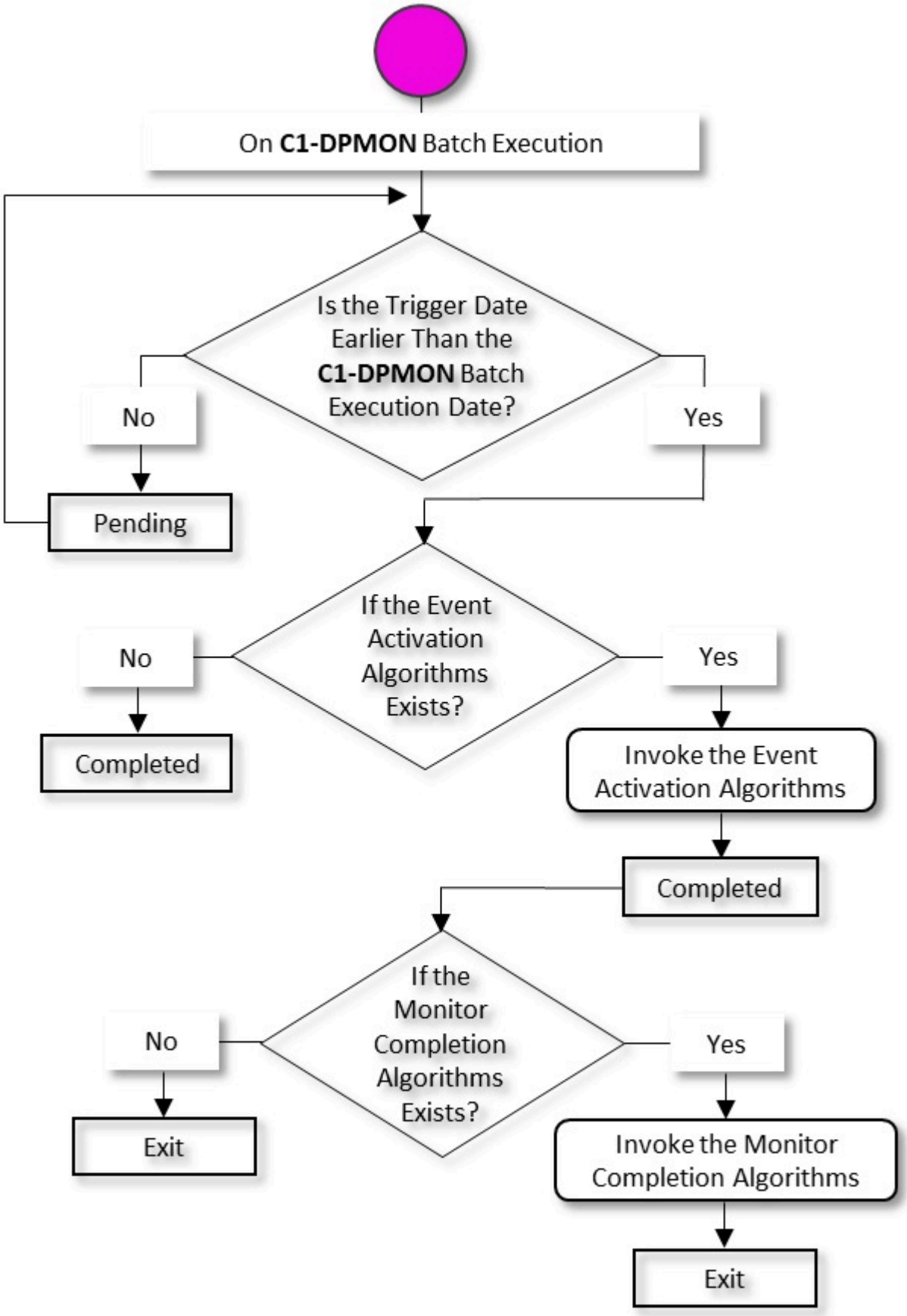

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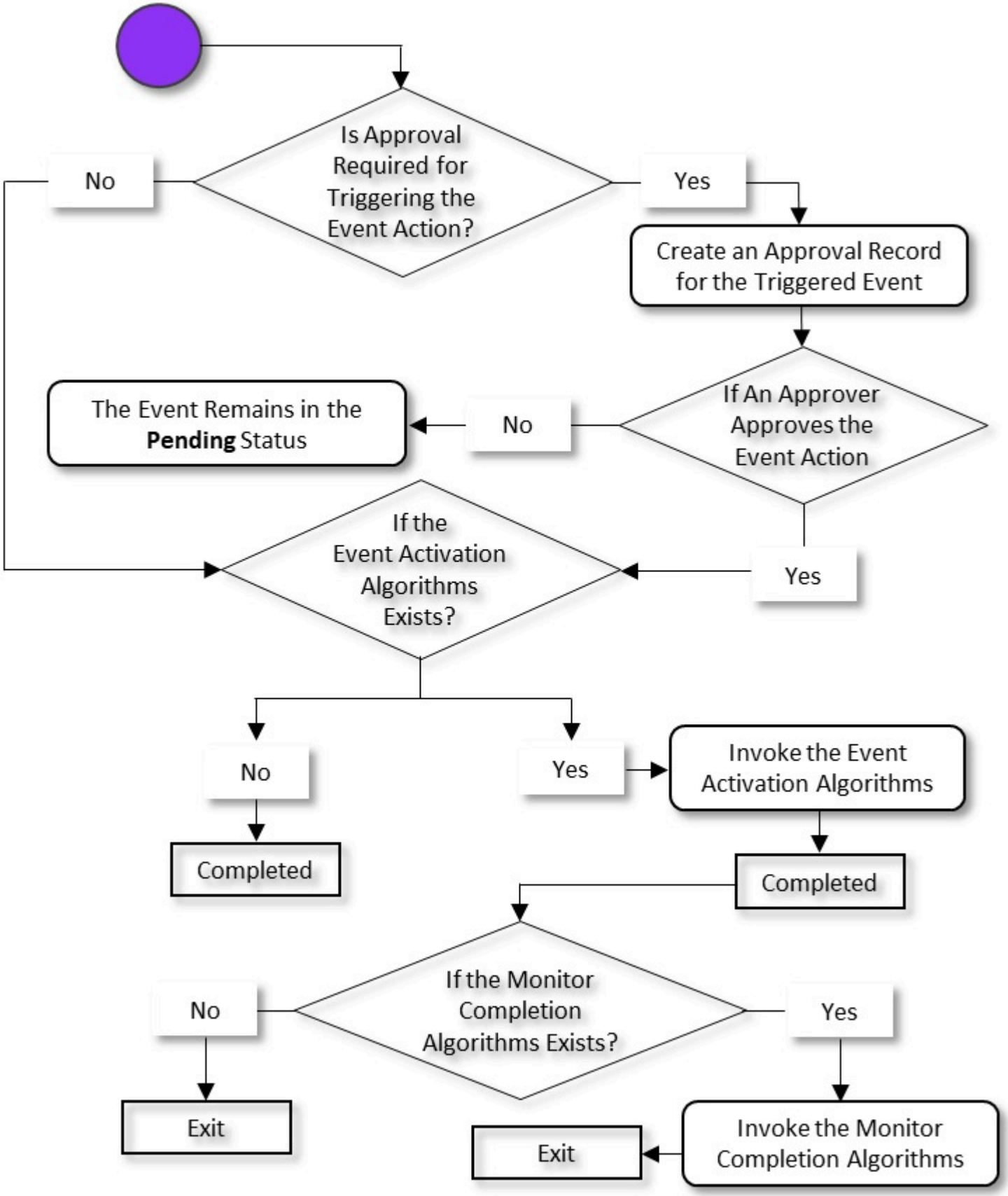

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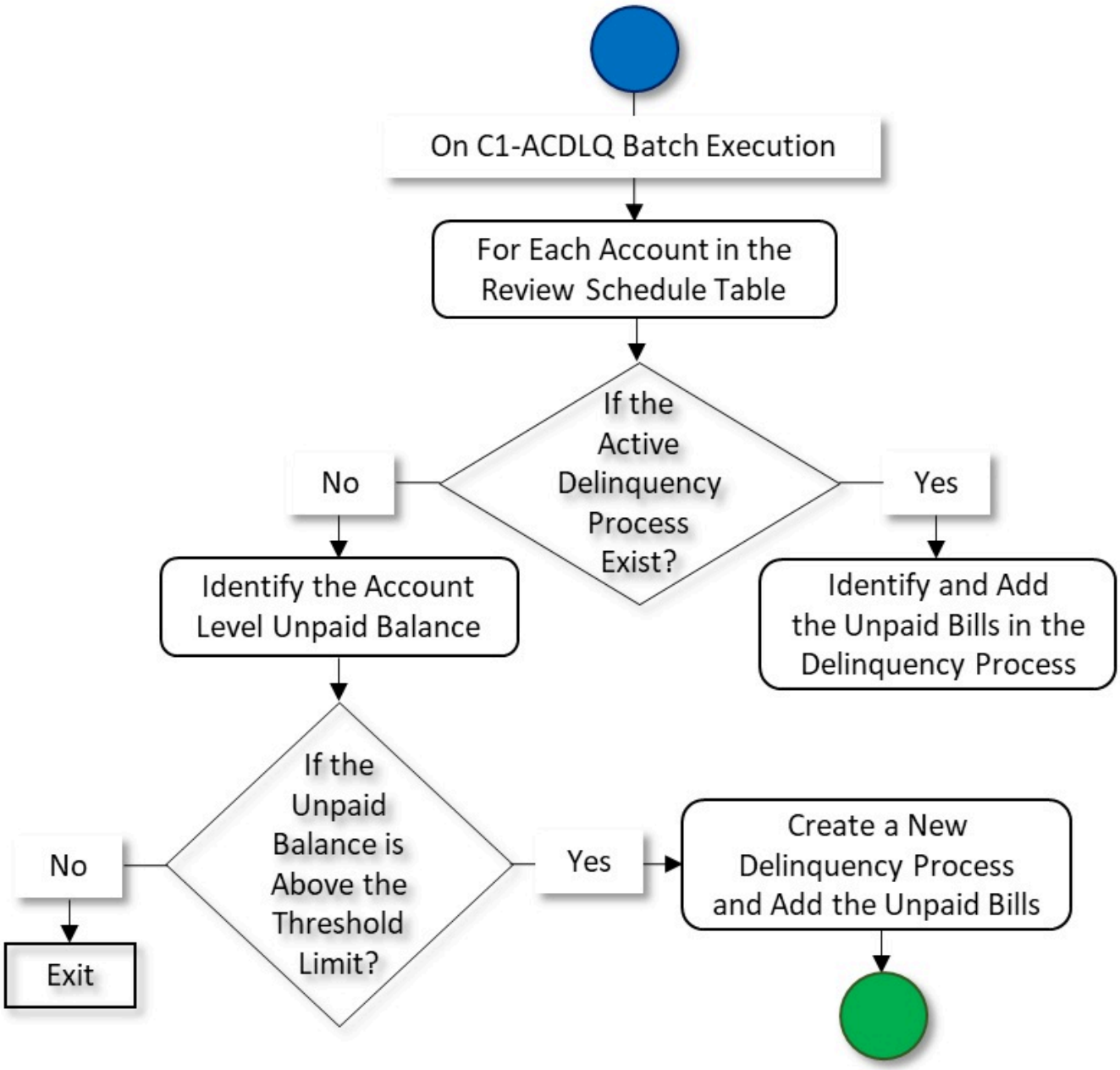
Delinquency Process Status Transition

The following figure graphically indicates how a delinquency process moves from one status to another in its lifecycle:



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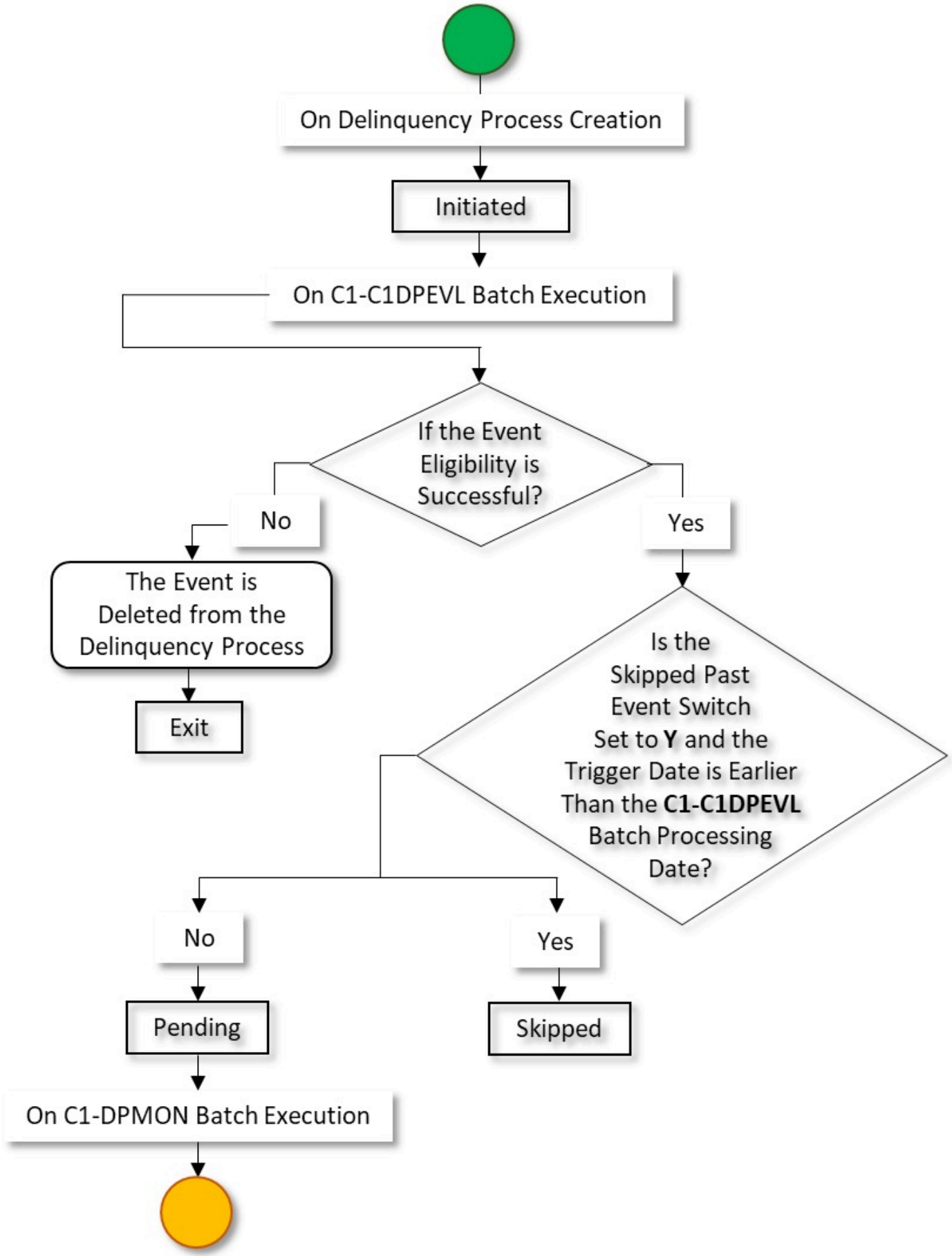

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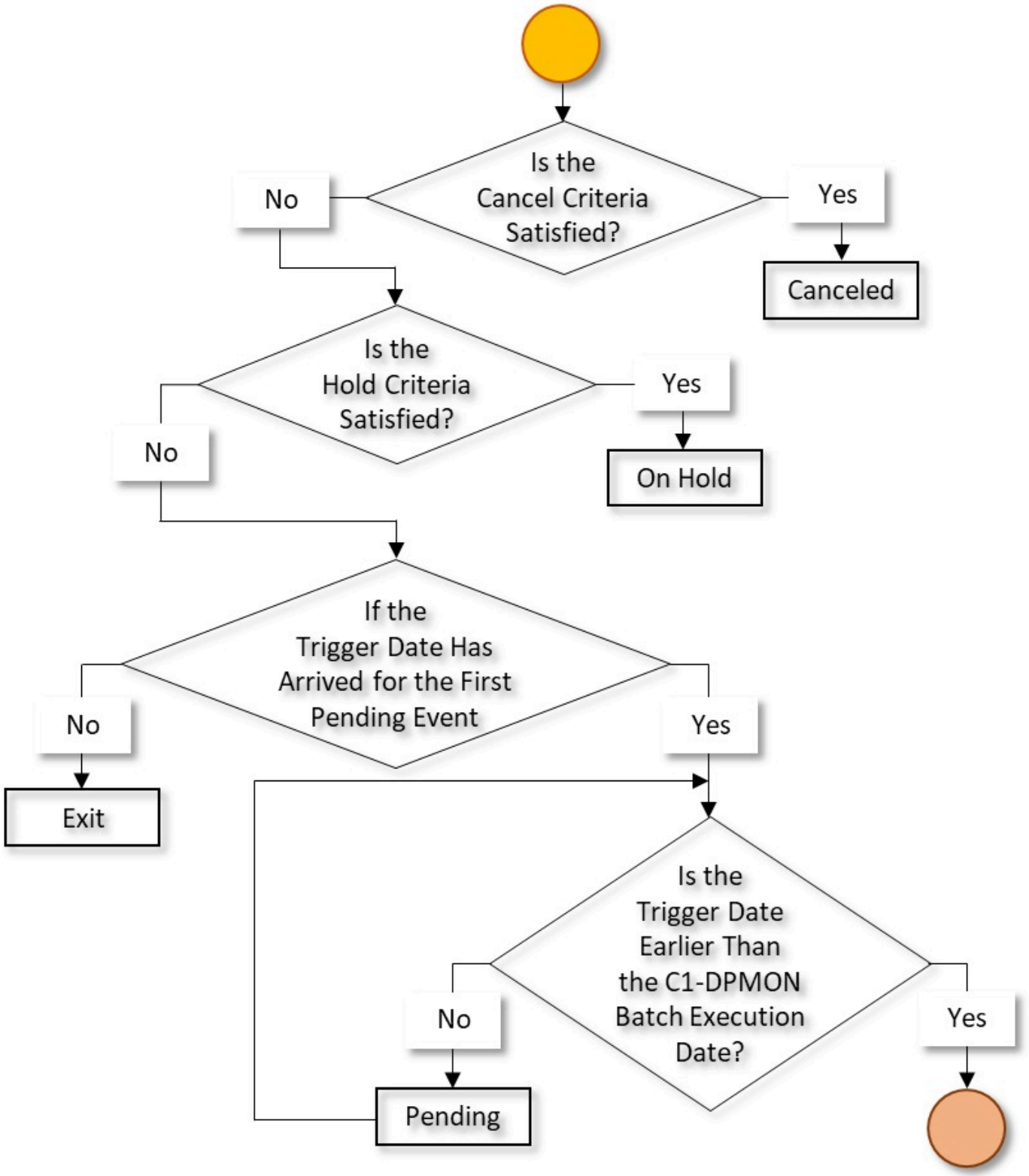

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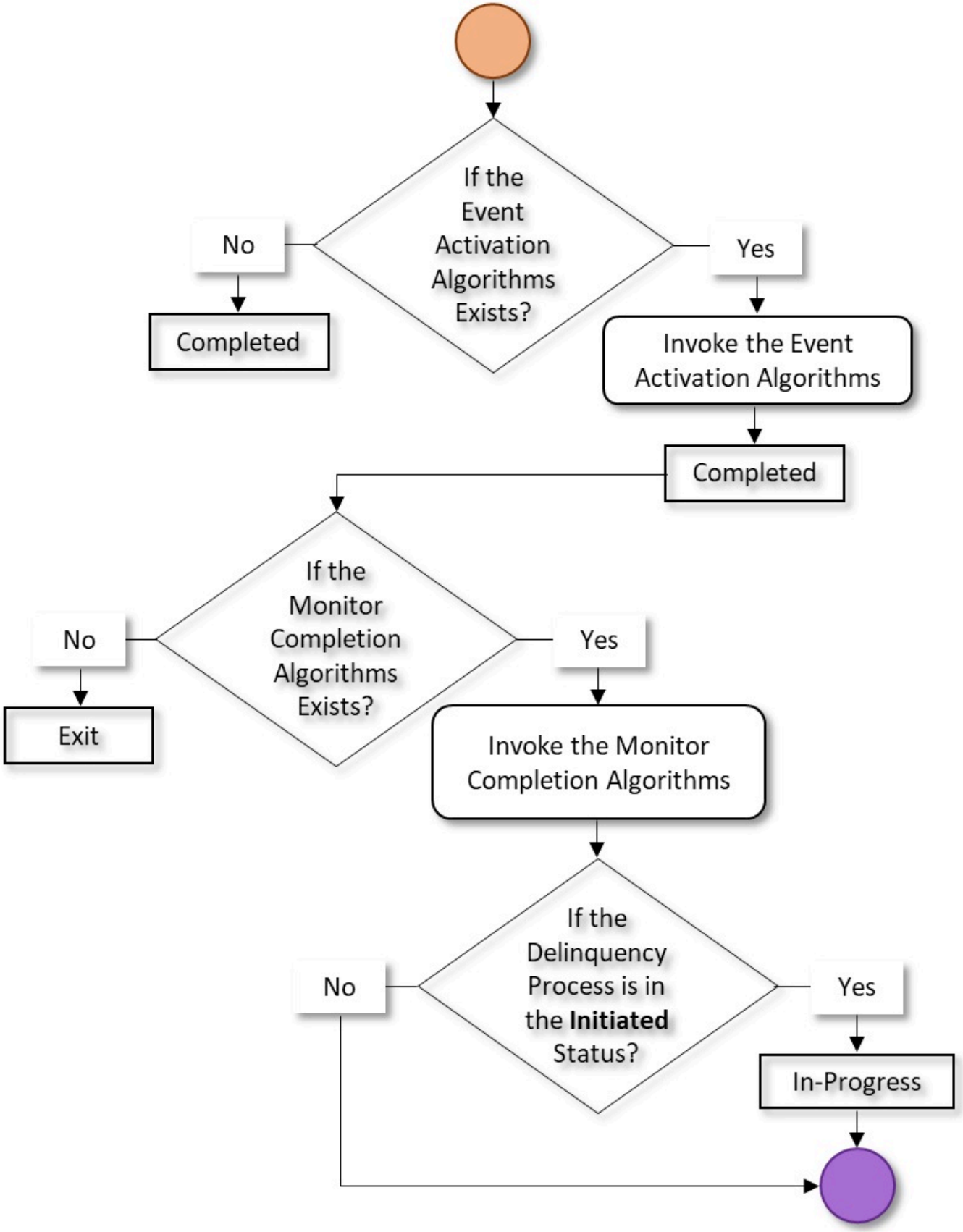

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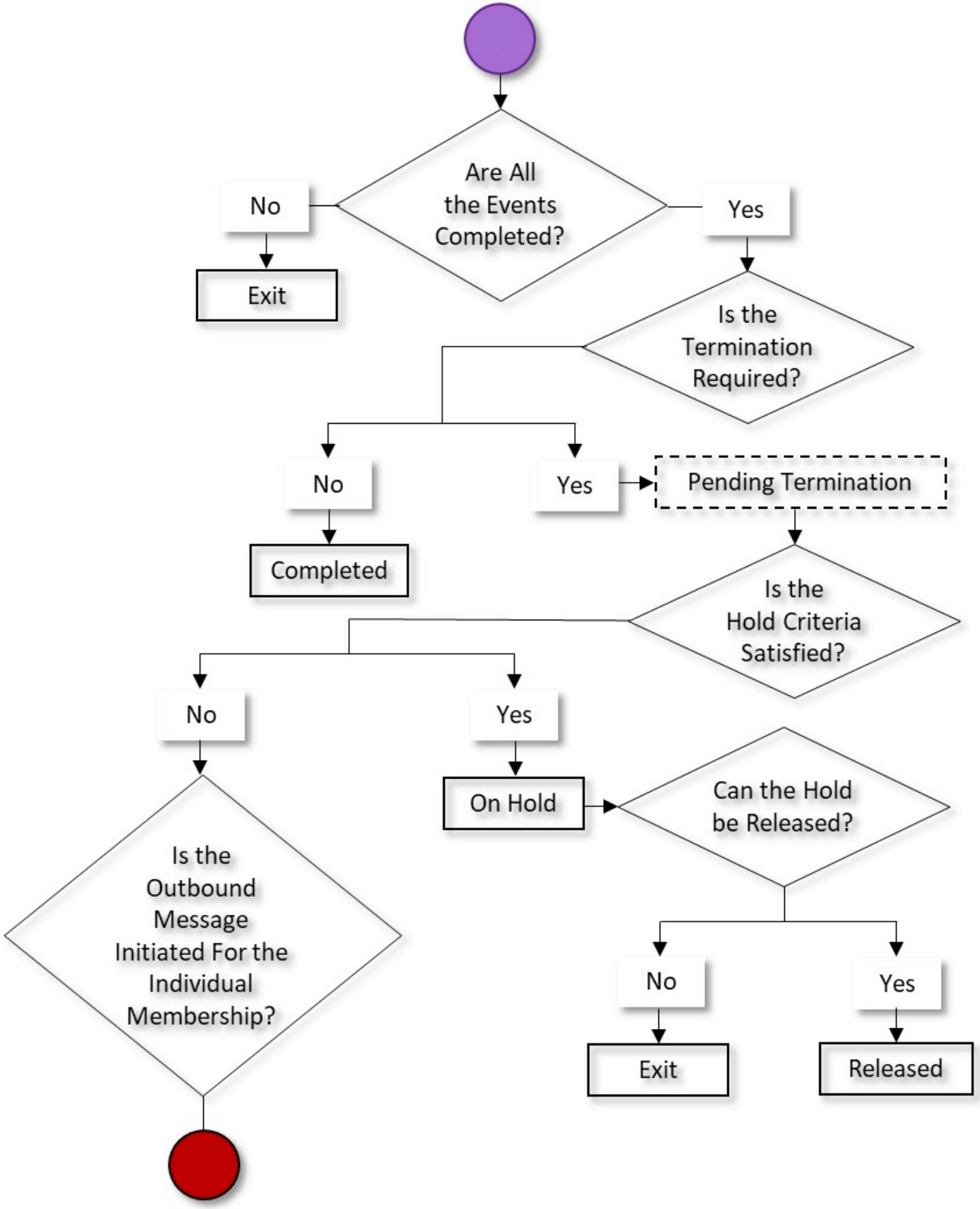

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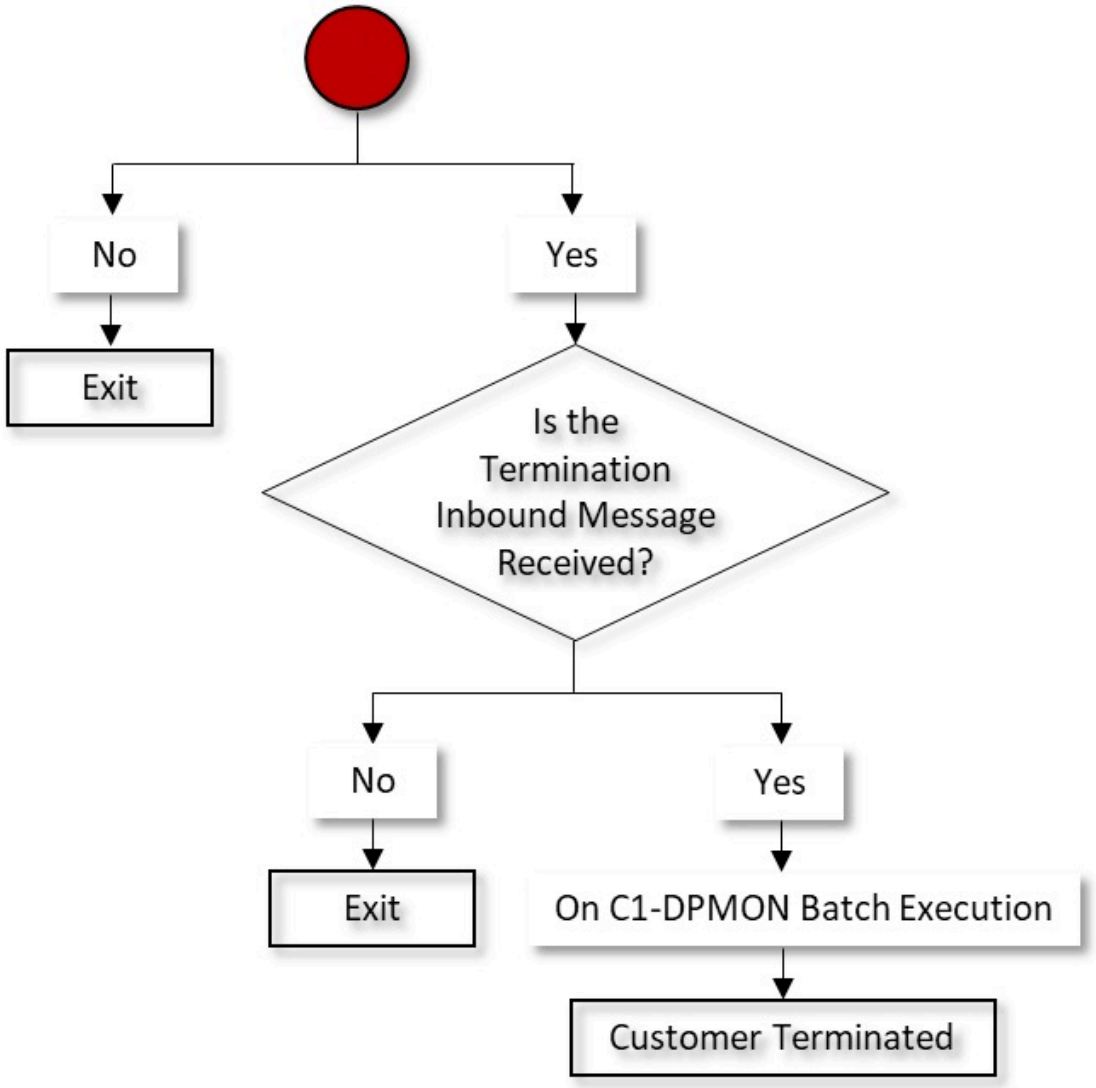

Group Delinquency Process Status Transition for an Account

The following figure graphically indicates how a group delinquency process for an account moves from one status to another in its lifecycle:

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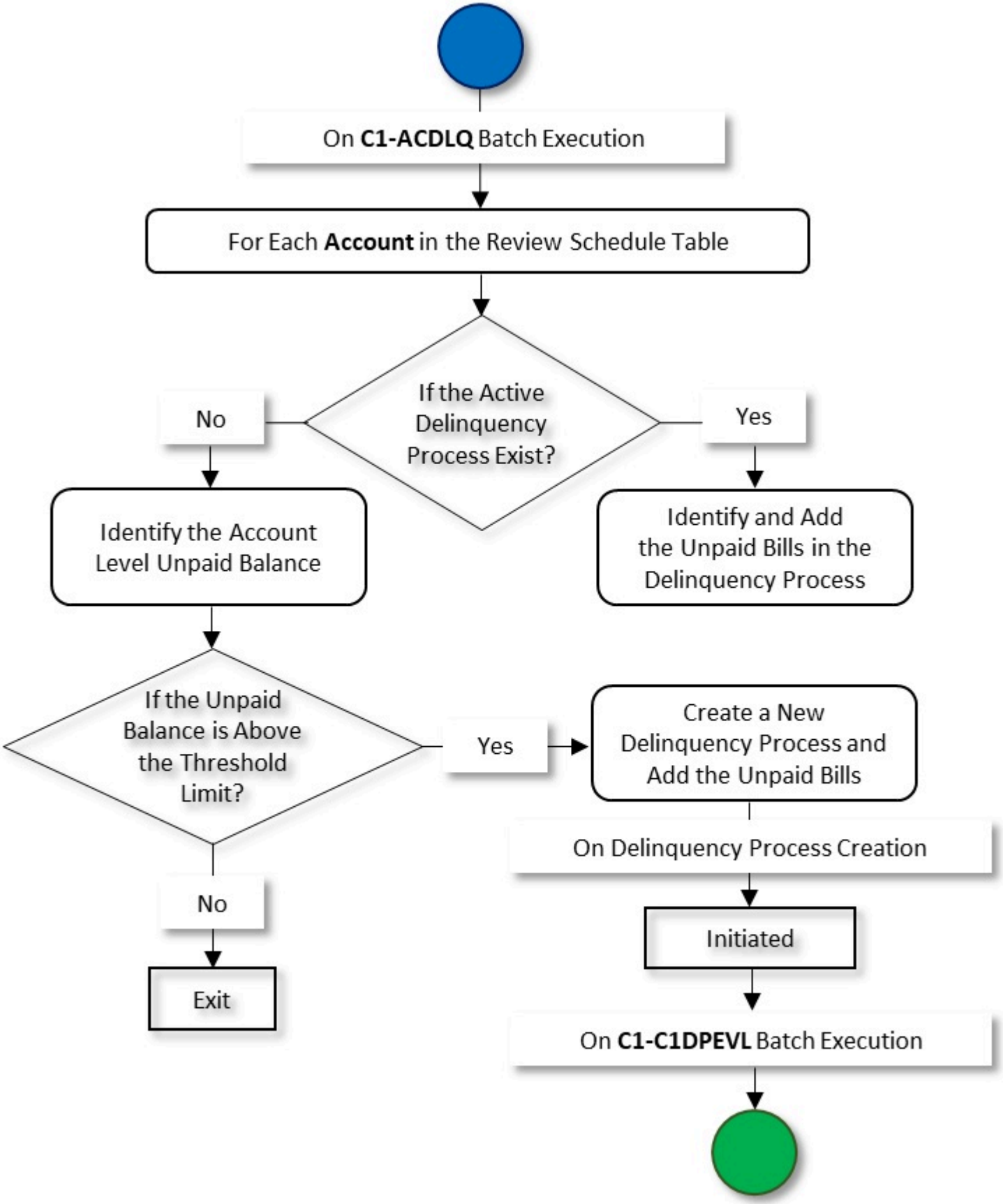

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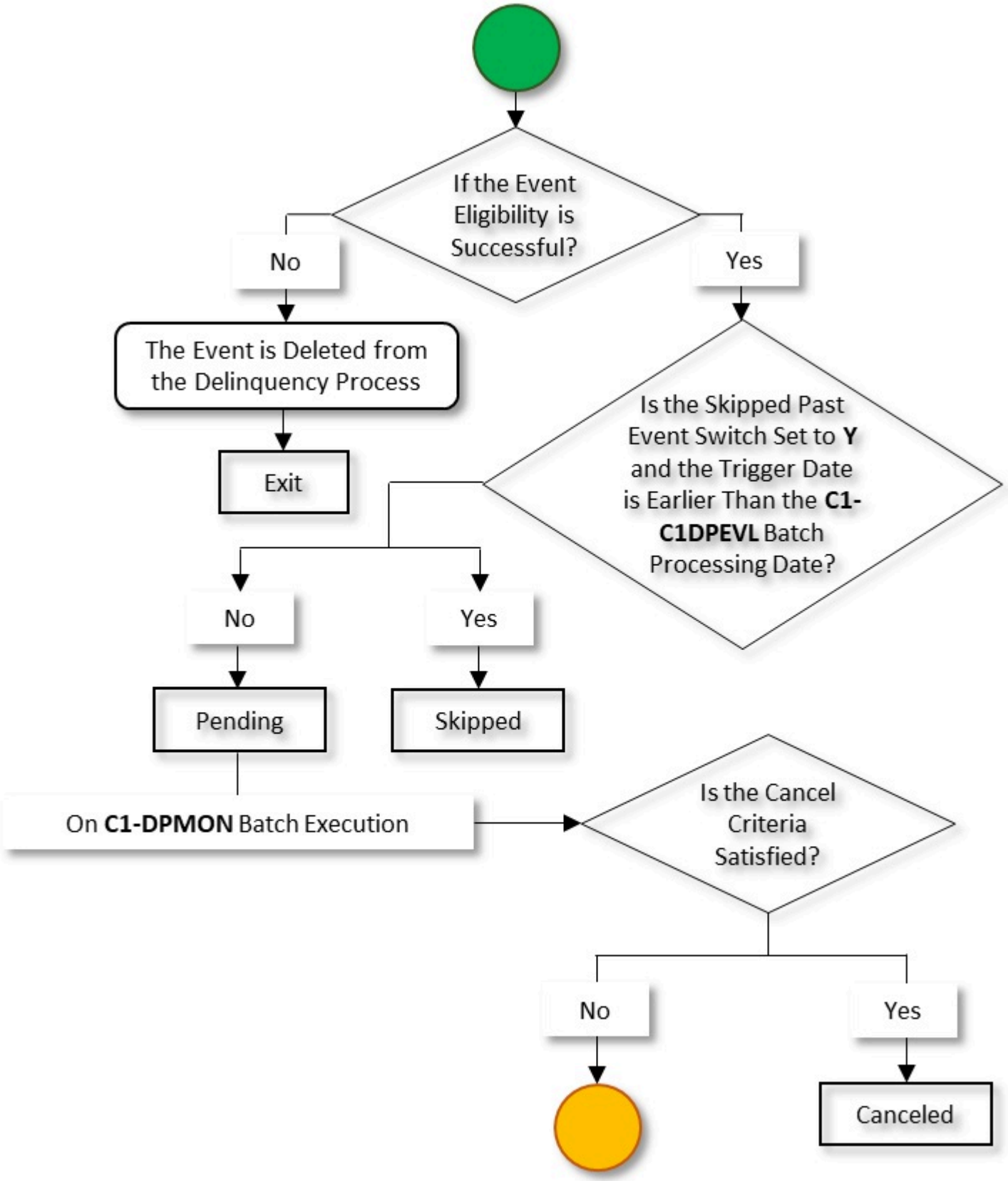

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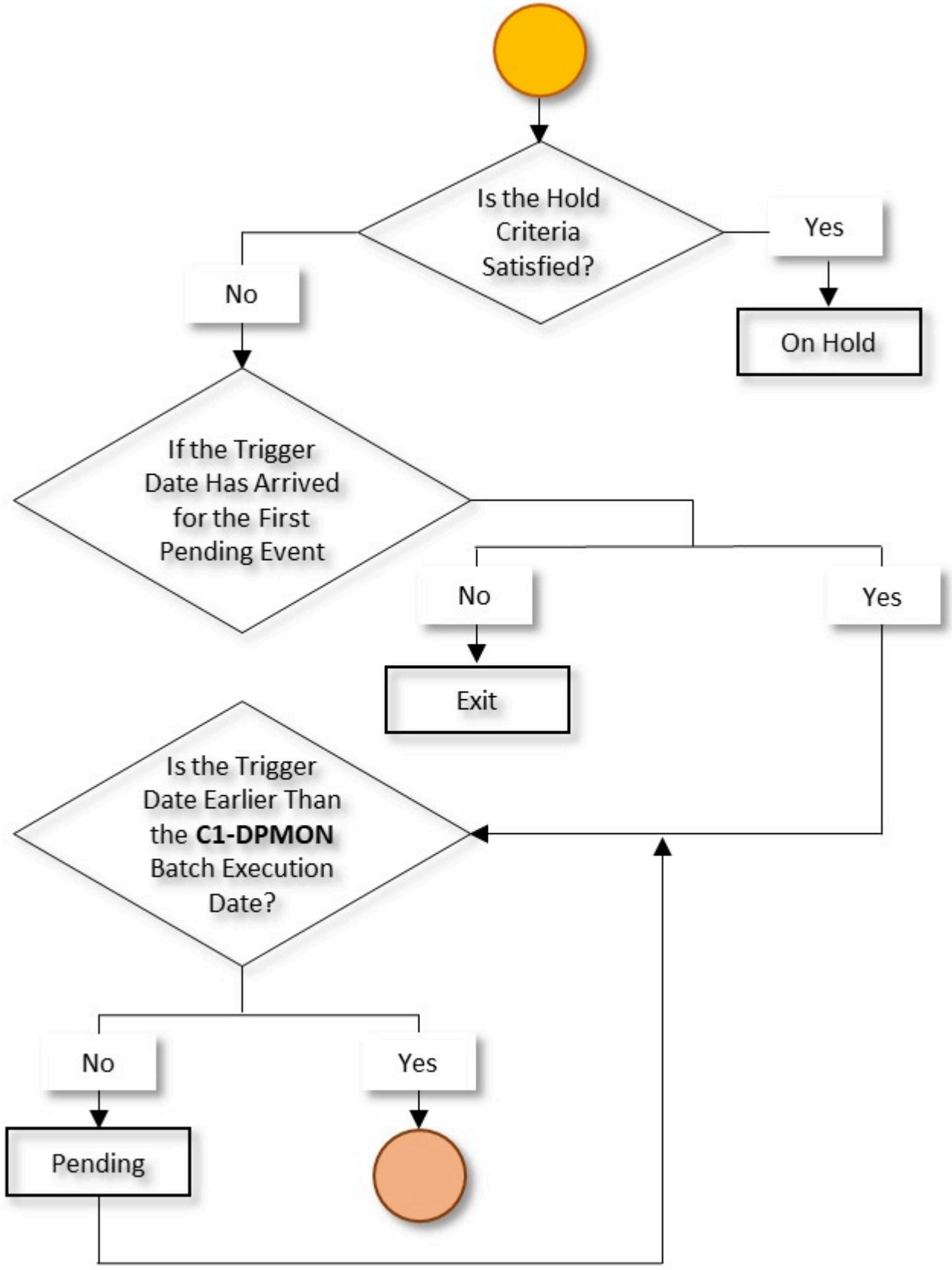

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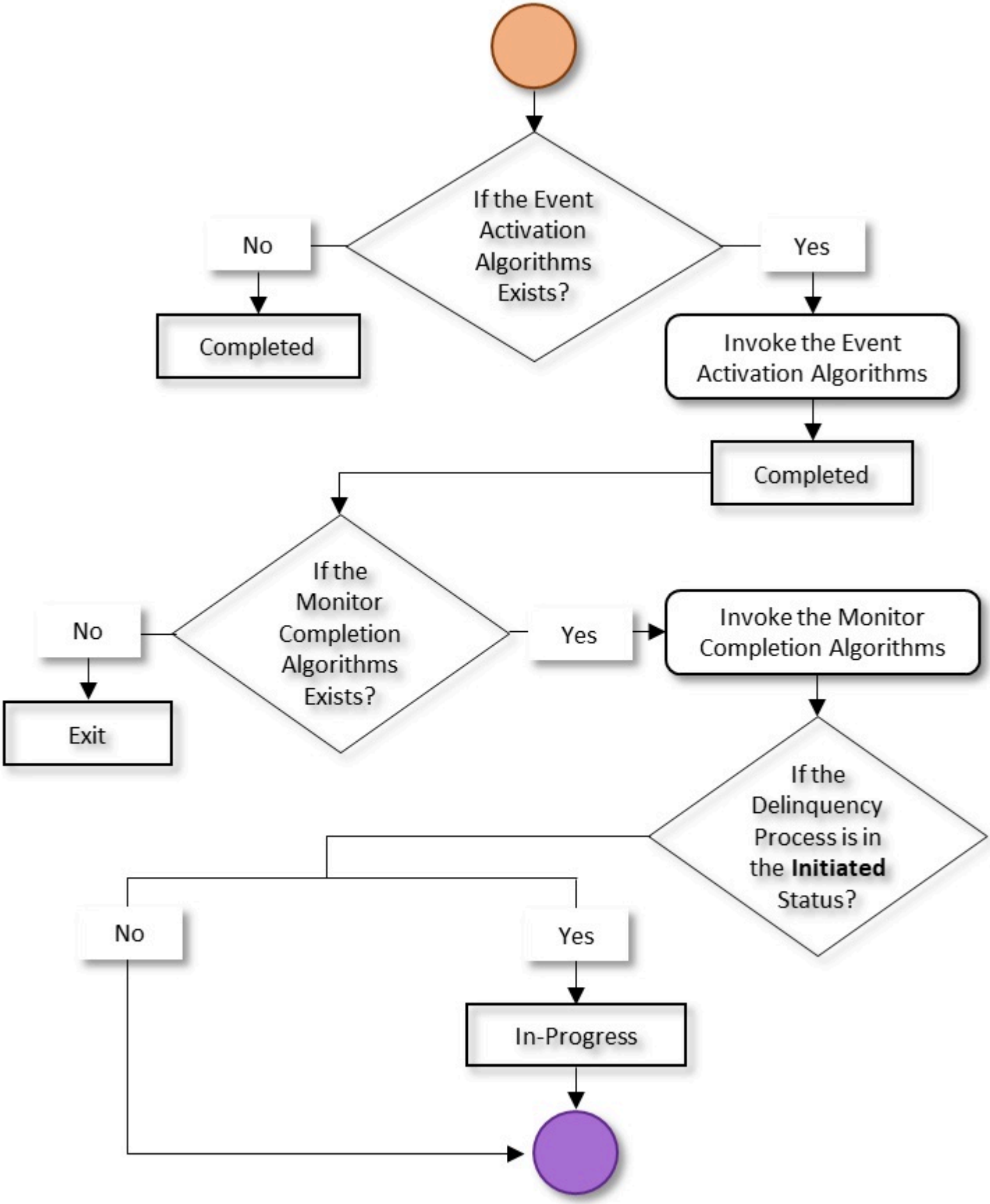

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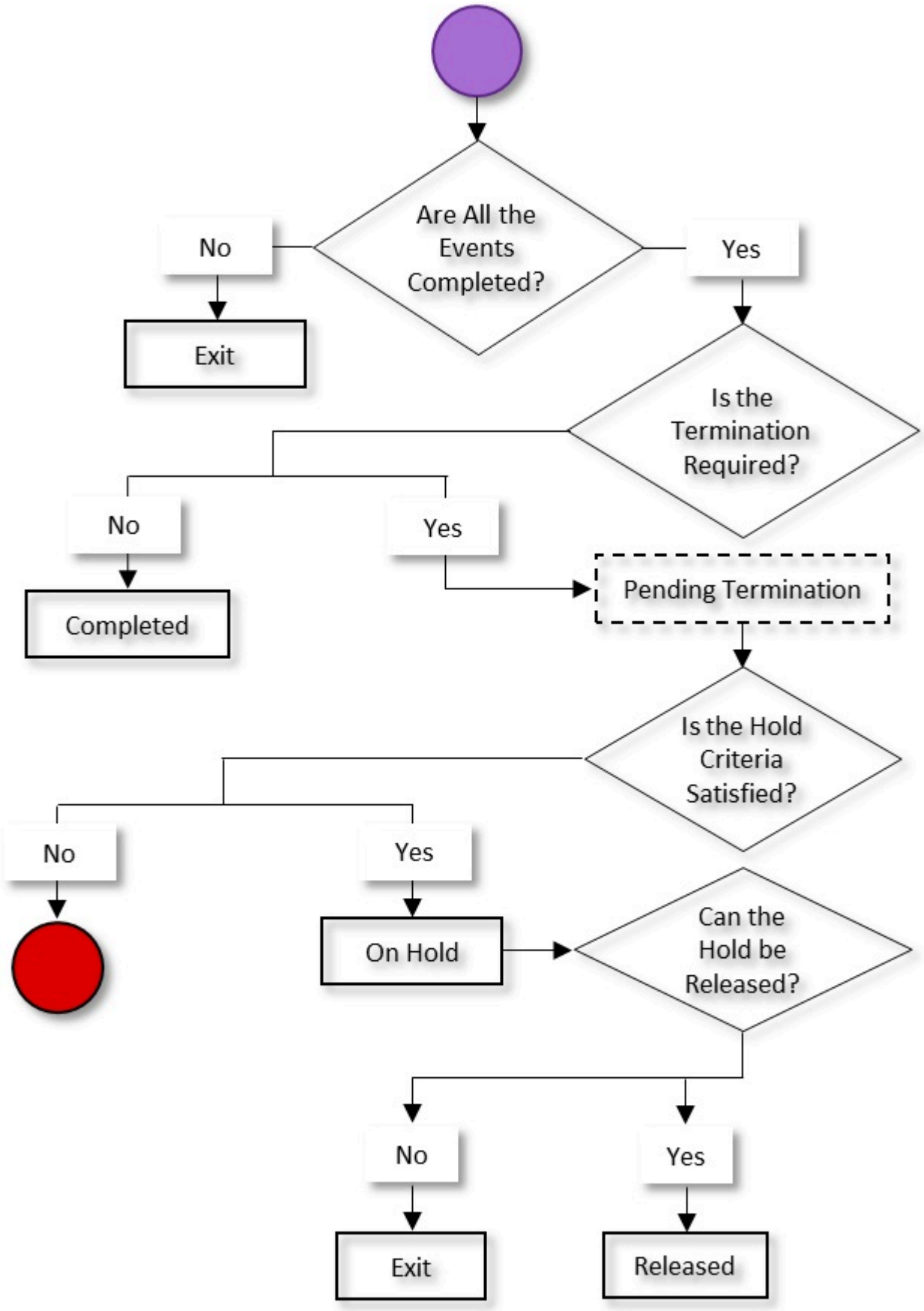

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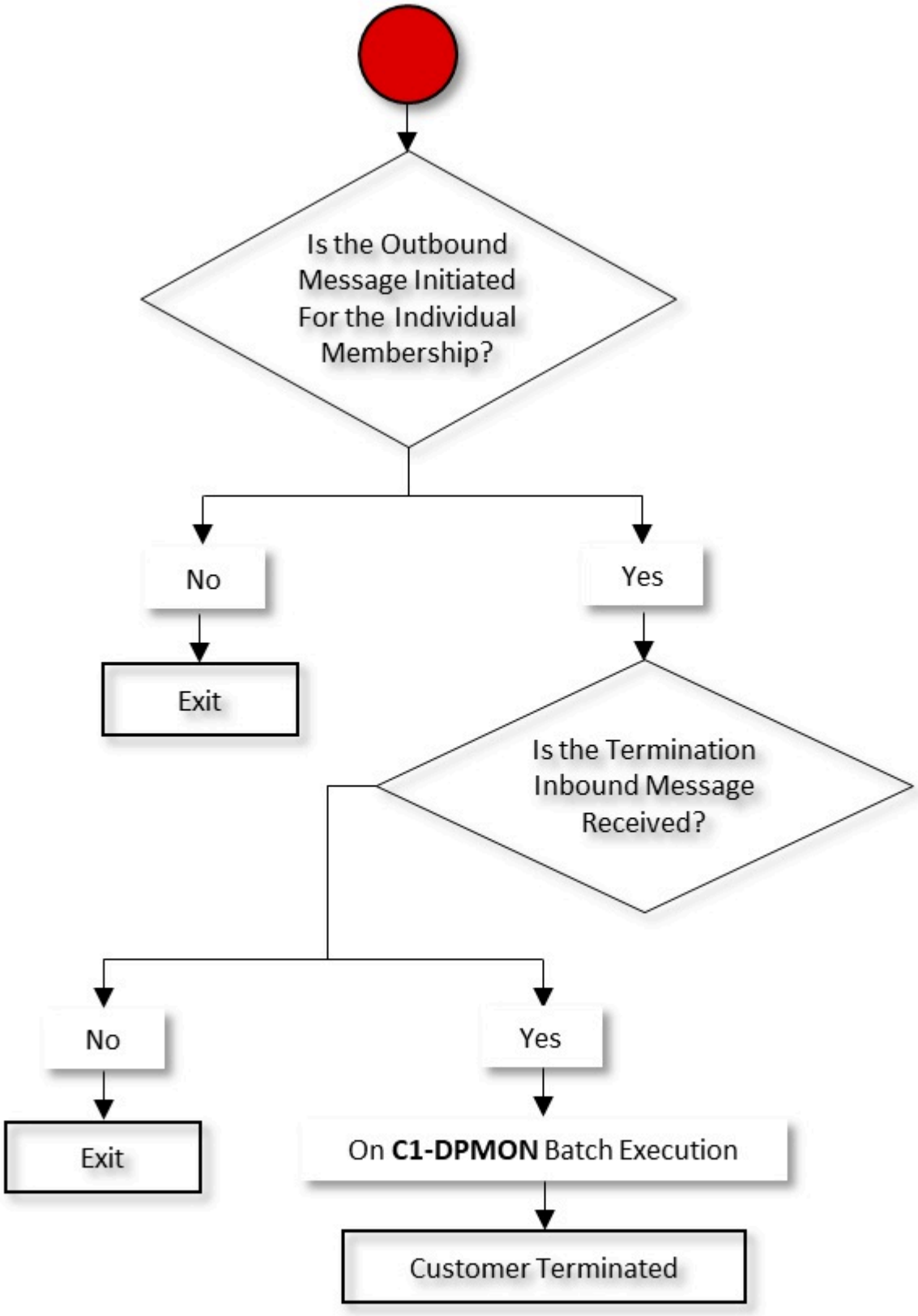

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Group Delinquency Process Status Transition for a Person

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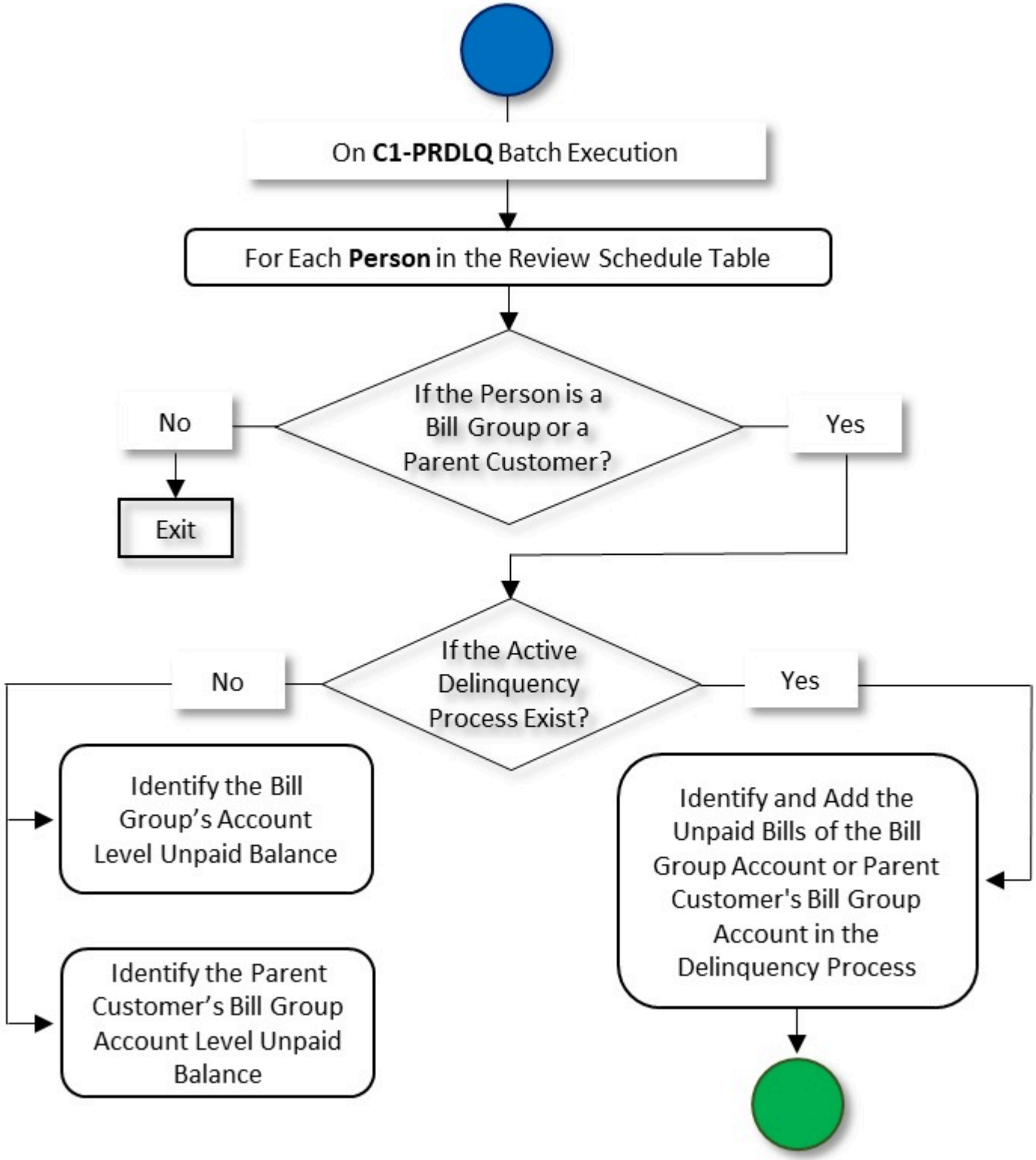

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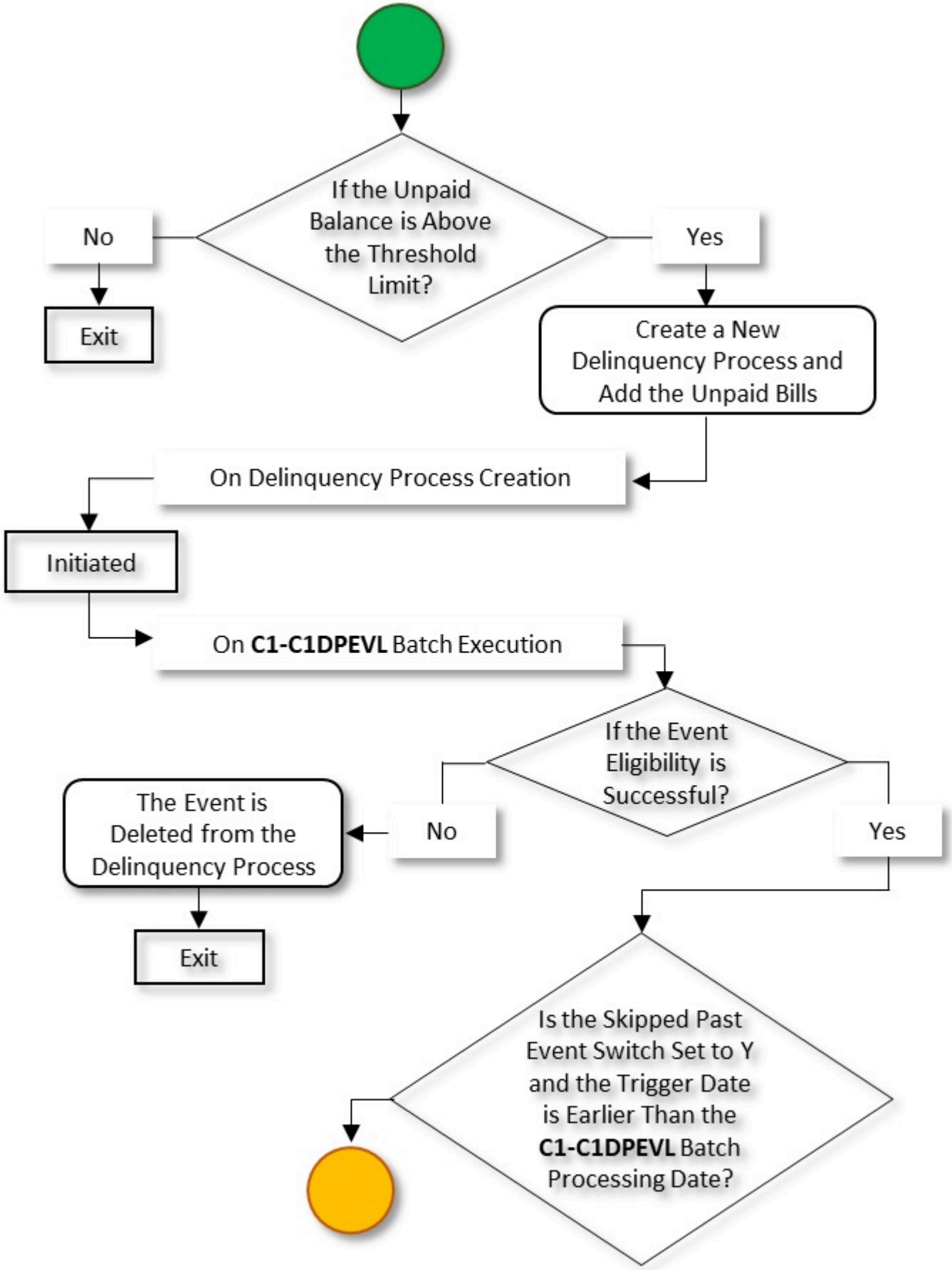

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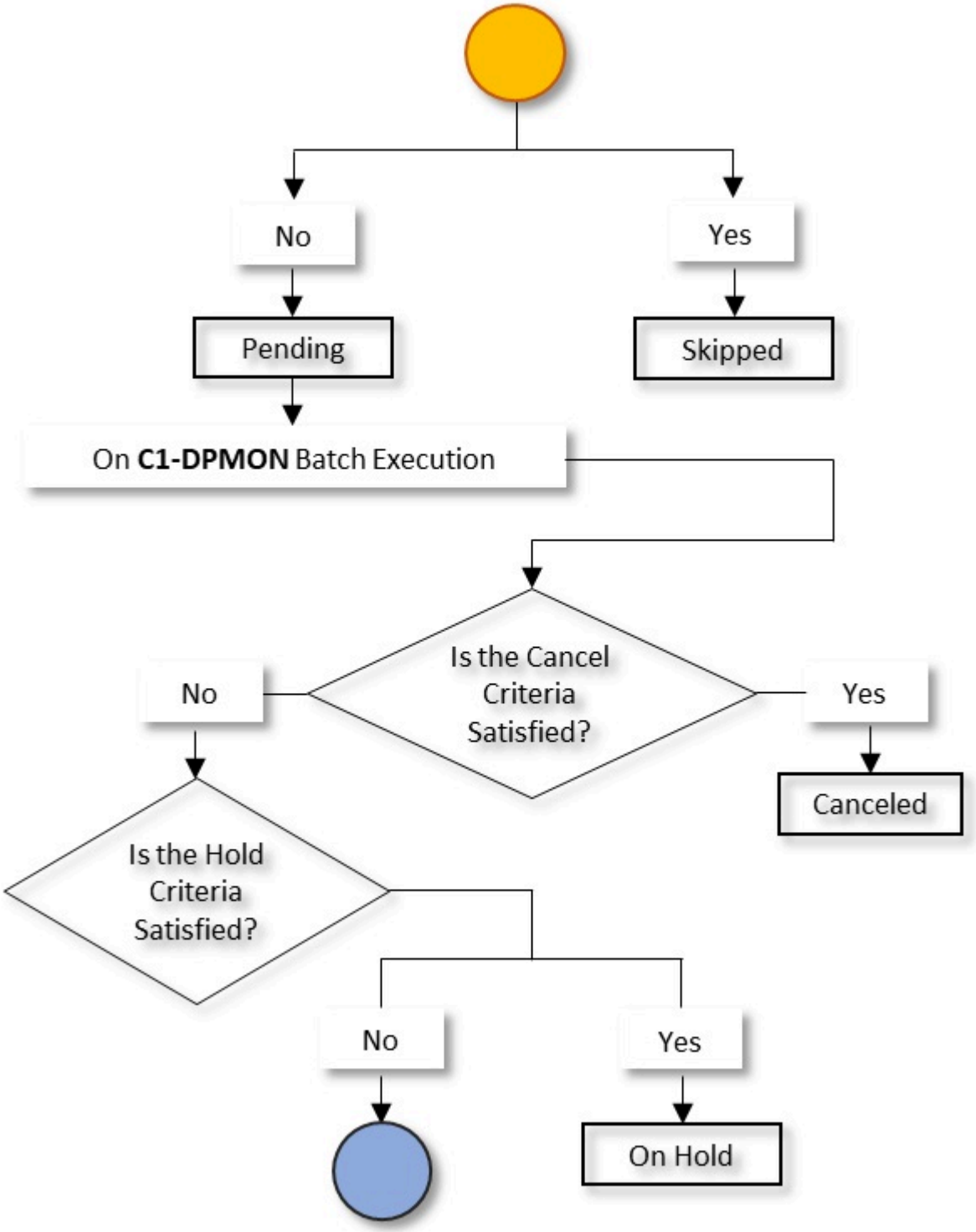

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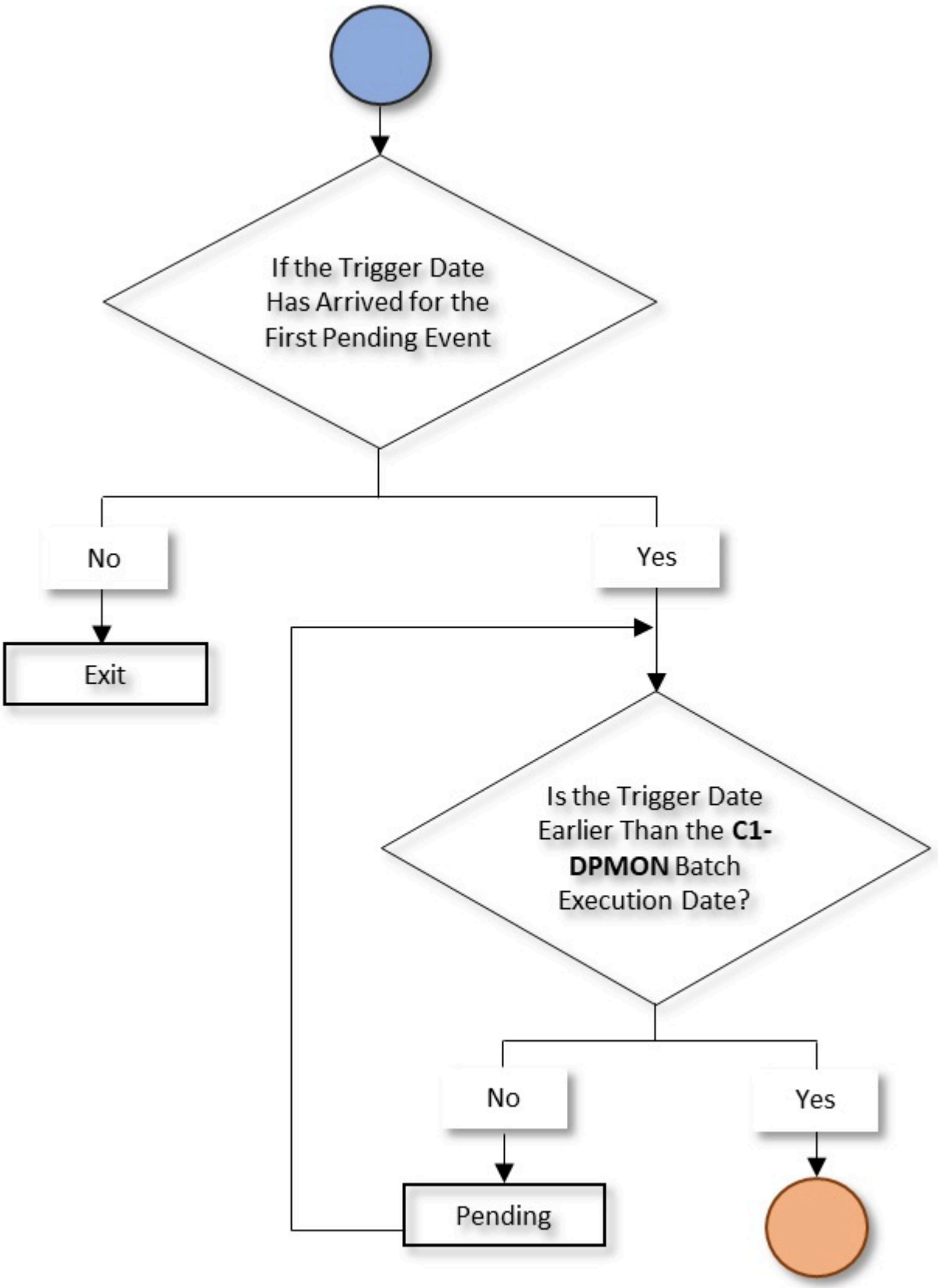

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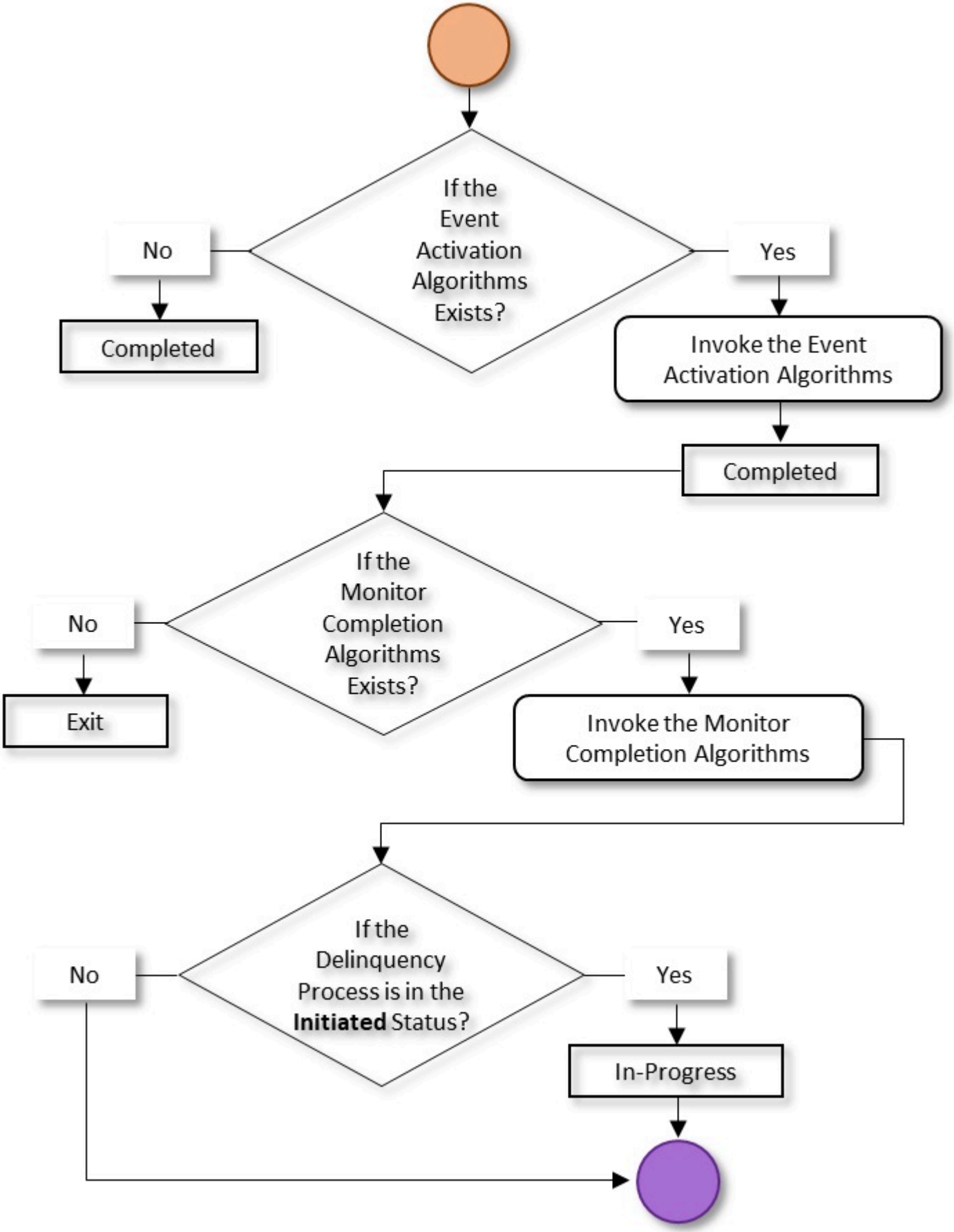

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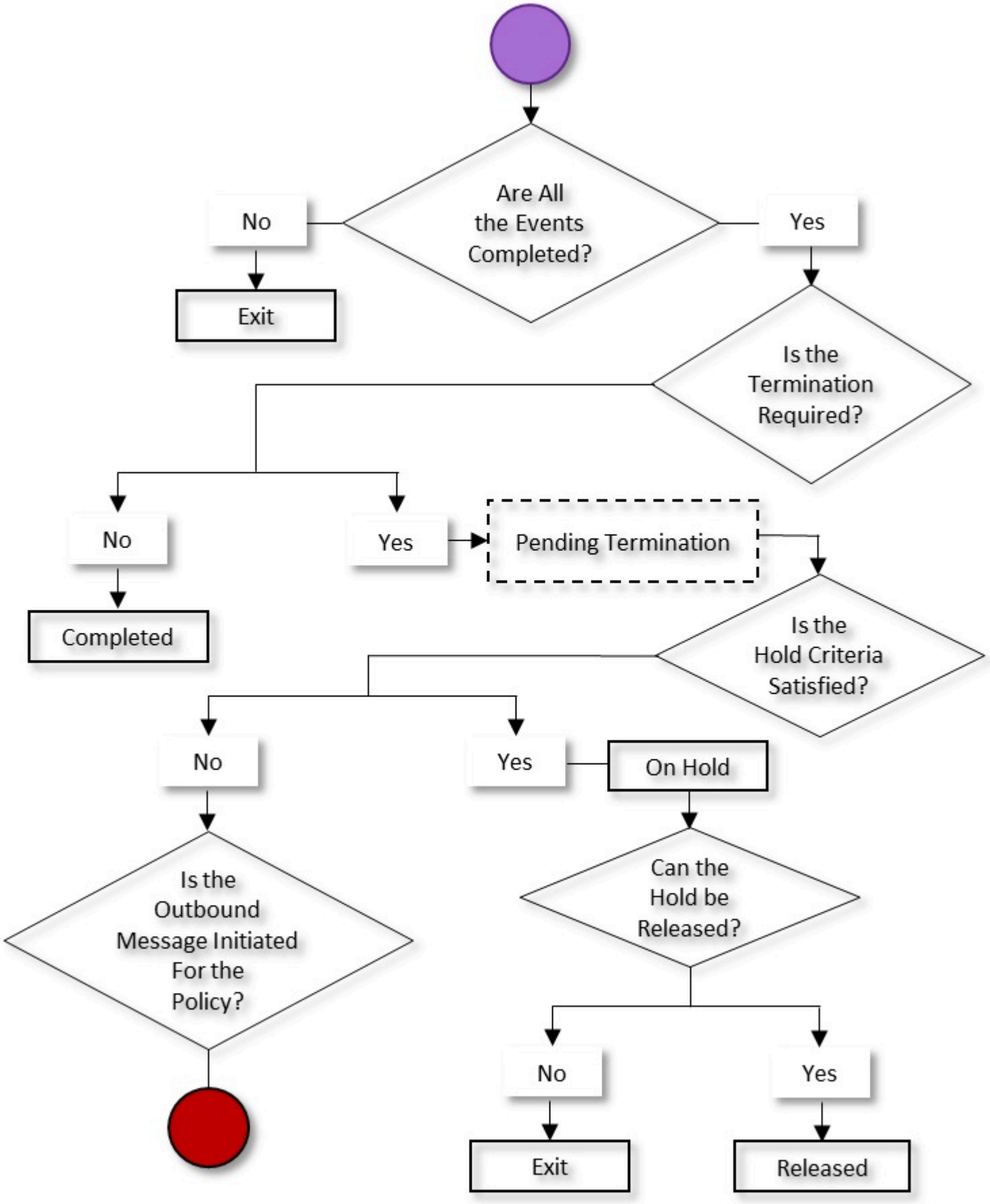

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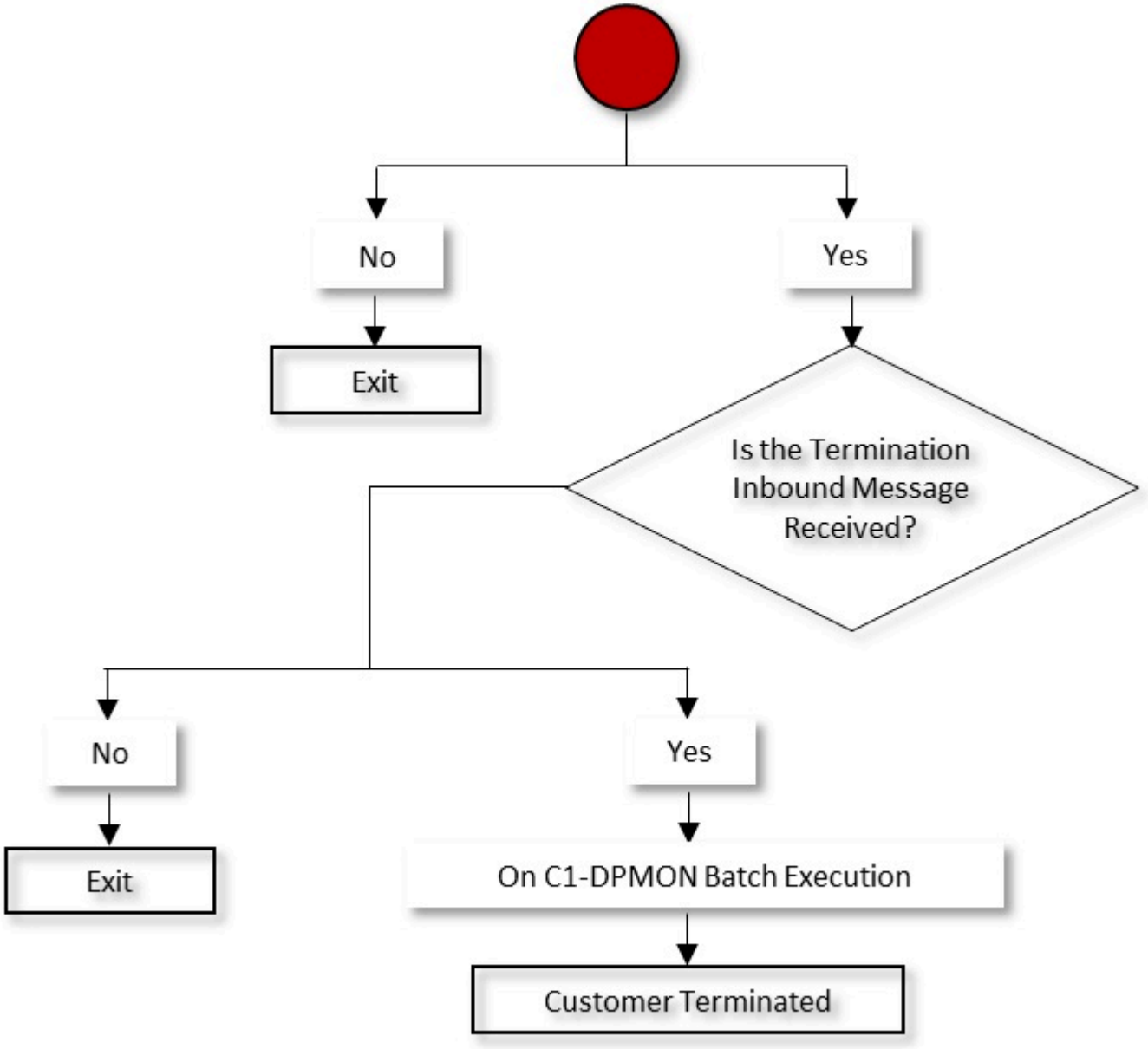

Delinquency Process Status Transition for Group Direct Billed Membership Delinquency Management

The following figure graphically indicates how a delinquency process for a group direct billed membership moves from one status to another in its lifecycle:

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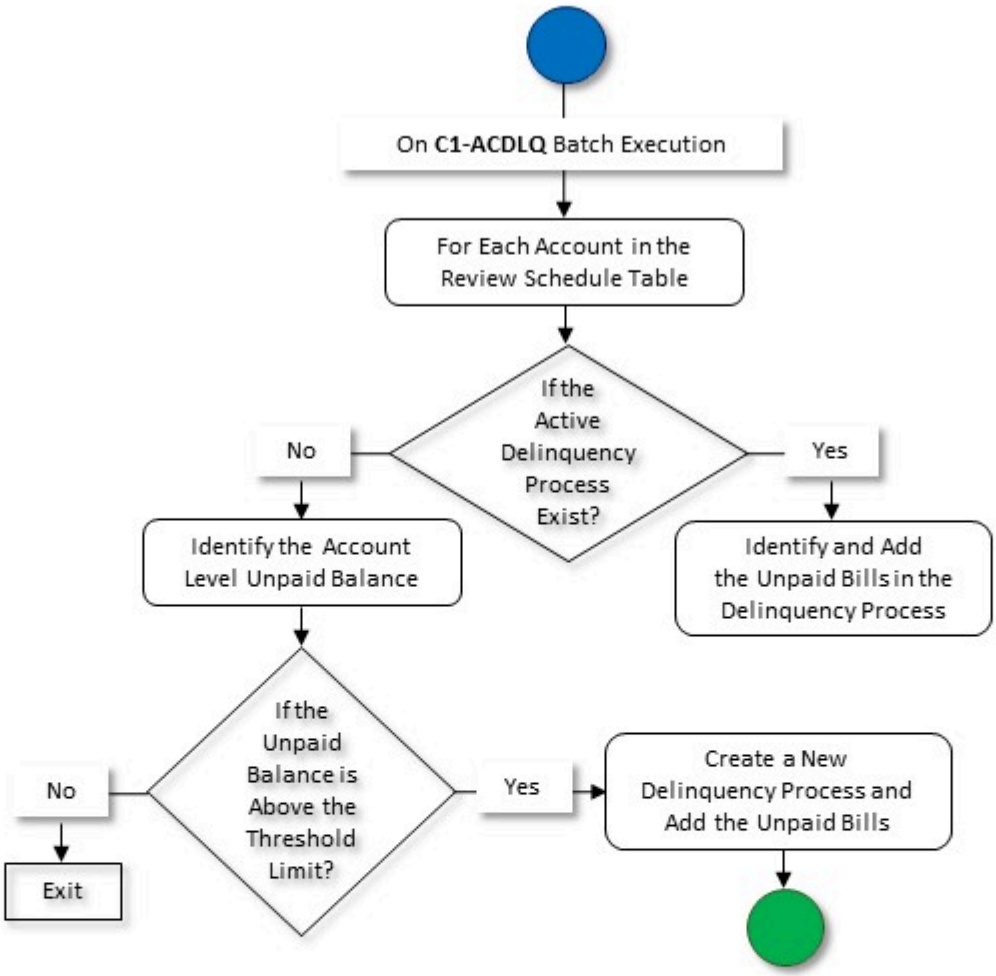

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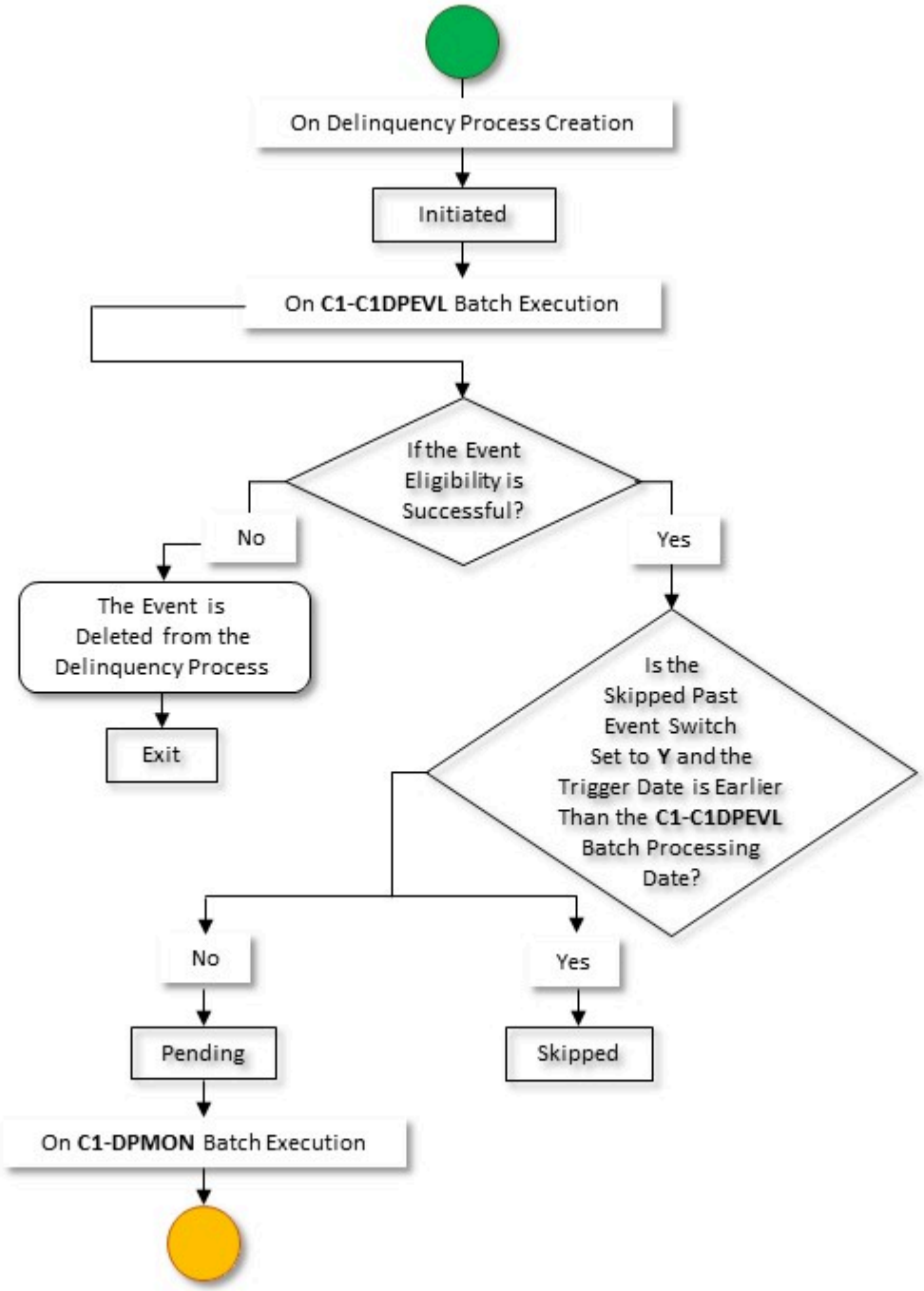

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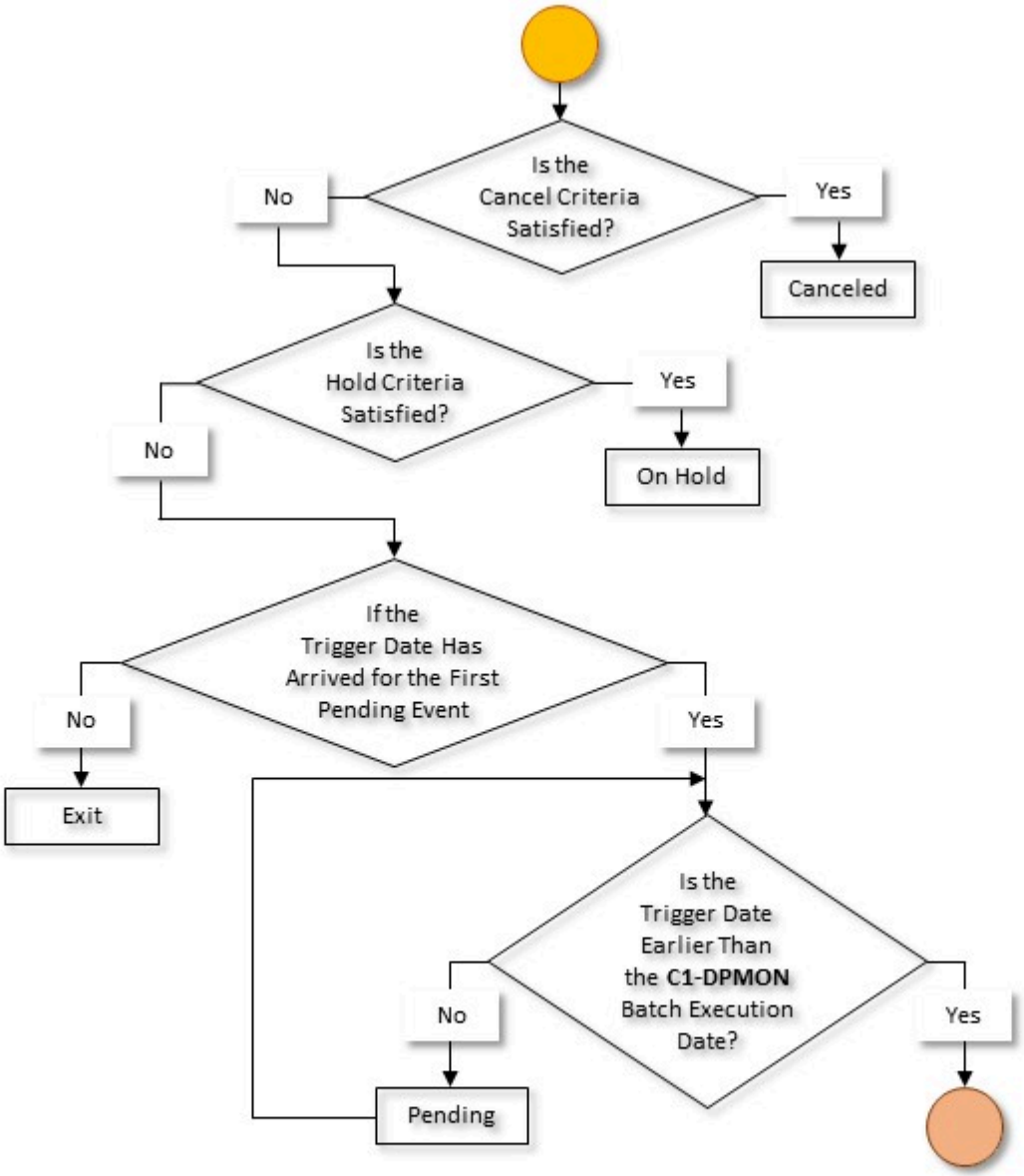

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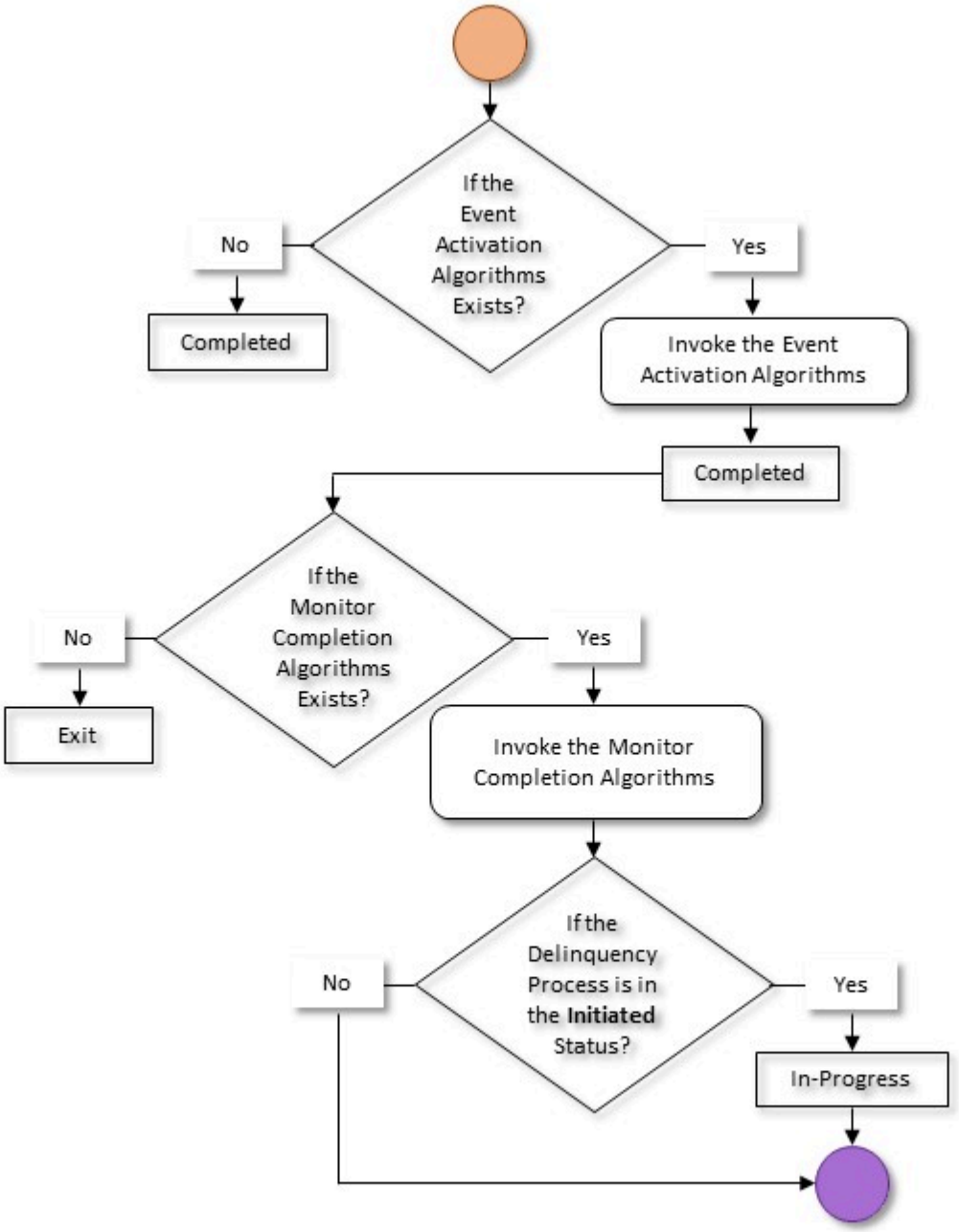

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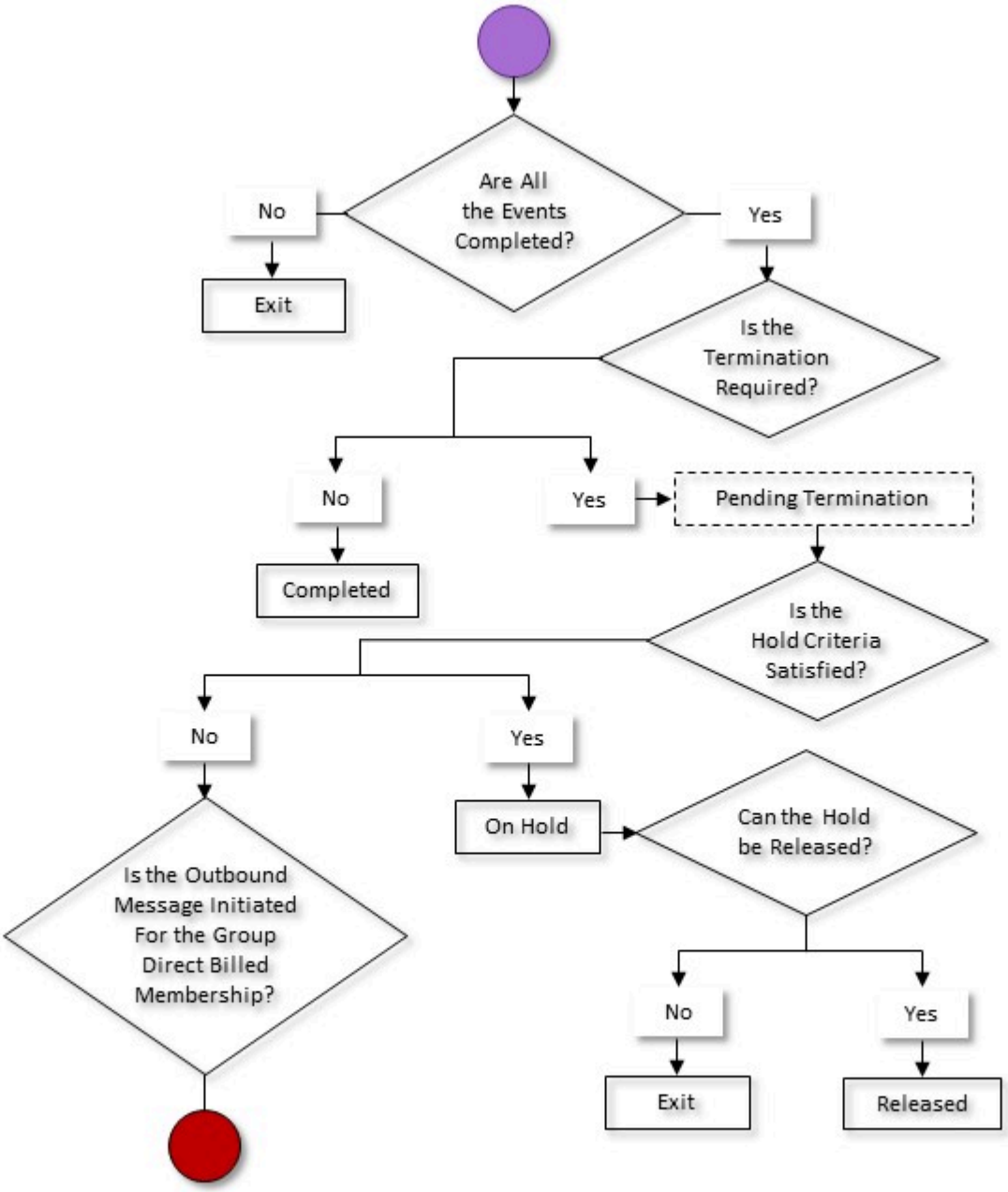

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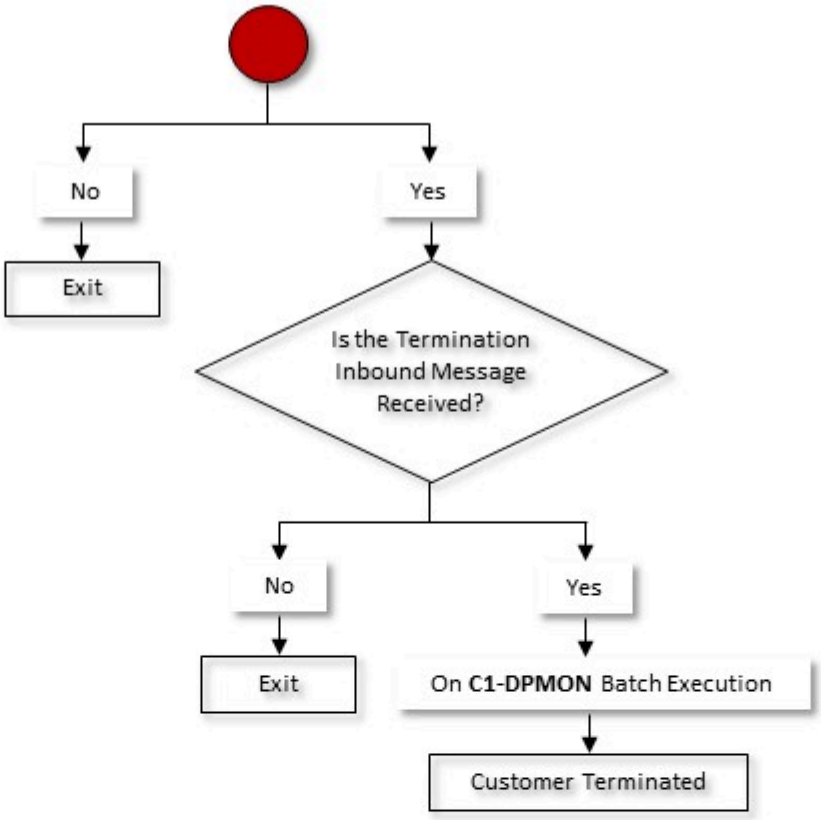

Delinquency Process Type

Once you create the delinquency event types, you need to create the required delinquency process types using which you want the system to create a delinquency process for a person or an account. You can design various delinquency process types that trigger different types of events for the different types of insurance coverages. For example, you can define different delinquency process types for the following:

- Active health plan coverages
- Inactive health plan coverages

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- Medical health plan coverages with benefits
- Medical health plan coverages without benefits
- Non-medical health plan coverages
- Non-effectuated health plan coverages

You can then configure the delinquency process type for each type of insurance coverage through the delinquency process type preference. For more information, see Delinquency Process Types Based on Insurance Coverage on page 4161. The system considers the delinquency process type preference which is specified in the **C1-DLNQMNRL** algorithm attached to the respective delinquency control. Depending on the following line of business, the system considers the delinquency process type preference specified in the respective parameter of the **C1-DLNQMNRL** algorithm:

Line of Business	**Algorithm Parameter**
Fully Insured Group	Delinquency Process Type Field Mapping – Group
Fully Insured Individual	Delinquency Process Type Field Mapping – Individual
Group Direct Billed Membership	Delinquency Process Type Field Mapping – Individual

A new maintenance object named **C1-DLQ-PRC-T** and a new business object named **C1-DelinProcType** are introduced to create the delinquency process types. The **Delinquency Process Type** screen enables you to create, edit, delete, and copy a delinquency process type. While creating a delinquency process type, you can specify the following:

- Basic details for the delinquency process type
- Details for the delinquency event trigger date calculation
- Types of delinquency events that you want to trigger in a delinquency process which is created using the delinquency process type
- Algorithms that you want to attach to the delinquency process type
- Details for the grace period calculation
- Details for the termination request (outbound message) trigger process
- Details for the termination date calculation
- Priority for each termination date rule
- Details for the trigger date recalculation when a delinquency process which is on hold is released and when a delinquency process which is canceled is resumed
- Actions for which you want to configure the approval process

Delinquency Process Type Details

While creating a delinquency process type, you need to specify the following details:

- The entity type (for example, **Account** or **Person**) for which the delinquency process type is applicable. Notethat the account level delinquency process is applicable for both the fully insured individual and fully insured group businesses whereas the person level delinquency process is applicable only for the fully insured group business.
- The business object using which the delinquency process should be created in the system.

  Note: A new maintenance object named **C1-DLN-PROC** and a new business object named **C1-Delinquency Process** are introduced to create the delinquency processes.
- The type of object (for example, bill) for which you want to manage collections through the delinquency process. Note that the system enables you select only those objects as the collection objects for which the **Eligible for Delinquency (Y/N)** option type is selected in the respective maintenance object. At present, the **Eligible for Delinquency (Y/N)** option type is only selected for the **BILL** maintenance object.
- Whether the termination process should be automatically initiated for the following:
  - Policies billed to the delinquent person or account
  - Individual memberships billed to the delinquent account

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- Whether the reinstatement process should be automatically initiated for the policies billed to the delinquent person or account. The automatic reinstatement is applicable only for the fully insured group business.
- The way in which you want to trigger the delinquency events in the delinquency process. The system supports the following ways:
  - **Automatic** - Used when you want the system to automatically trigger delinquency events on the trigger date through the **C1-DPMON** batch. The trigger dates are calculated for the delinquency events when you execute the **C1-DPEVL** batch. The trigger dates of the delinquency events are calculated using the given trigger date calculation details, such as trigger date calculation mode, wait period, etc. If you set the delinquency event trigger mode to **Automatic**, the system does not allow you to trigger the delinquency events manually from the user interface. The **Trigger** icon corresponding to a delinquency event in the **Delinquency Process** screen is disabled.
  - **Manual** - Used when you want to manually trigger delinquency events in the delinquency process at the desired interval. In this case, the trigger dates are not calculated for the delinquency events. The **Trigger** icon appears corresponding to a delinquency event in the **Delinquency Process** screen. You can trigger a delinquency event by clicking the **Trigger** icon corresponding to the delinquency event in any order irrespective of its sequence in the delinquency process. If you set the delinquency event trigger mode to **Manual**, the system does not automatically trigger delinquency events on the trigger date through the **C1-DPMON** batch.
  - **Manual or Automatic** – Used when you want the system to automatically trigger delinquency events on the trigger date through the **C1-DPMON** batch. The trigger dates are calculated for the delinquency events when you execute the **C1-DPEVL** batch. The trigger dates of the delinquency events are calculated using the given trigger date calculation details, such as trigger date calculation mode, wait period, etc. Here, you also have an option to manually trigger a delinquency event in the delinquency process whenever required before the trigger date to the expedite the collections process. The **Trigger** icon appears corresponding to a delinquency event in the **Delinquency Process** screen. You can trigger a delinquency event by clicking the **Trigger** icon corresponding to the delinquency event. Ideally, you must trigger a delinquency event in the ascending order of its sequence. However, if you manually trigger a delinquency event in any order, all the delinquency events in the **Pending** status before the manually triggered delinquency event will be skipped in the delinquency process. The status of such delinquency events is changed to **Skipped**.

Delinquency Event Trigger Date Calculation Details

While creating a delinquency process type, you need to specify the following details:

- Whether you want to delay a delinquency event for a specific period that can be specified either in days or months.
- Whether the trigger date of a delinquency event should fall on a business day
- The method in which you want to calculate the trigger date for the delinquency events. The system supports the following methods:
  - **Latest Bill Due Date with Grace Period** – Used when you want to derive trigger date using the latest bill due date and grace period. The system considers the latest bill due date as the grace start date. It then derives the grace end date using the grace start date and grace period (in days). Once the grace start and end dates are derived, the system calculates the trigger date based on the trigger period and wait period configuration of the delinquency event type as shown below:

Trigger Period	Wait Period	Wait Days	Trigger Date is set to…
After Grace End Date	Wait Days	10	Grace End Date + 10 days
Before Grace End Date	Wait Days	5	Grace End Date - 5 days

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Note:

The system supports only wait days when the trigger date calculation mode is set to **Latest Bill Due Date with Grace Period**.

The system derives the wait days from the delinquency process type or using an algorithm attached to the **Wait Days Derivation** system event depending on the wait period source which is specified in the delinquency process type.

The system derives the grace period from the delinquency process type or using an algorithm attached to the **Grace Period Derivation** system event depending on the grace period source which is specified in the delinquency process type.

- **Paid Through Date** – Used when you want to derive trigger date using the paid through date of the account and the wait period. The system calculates the trigger date based on the wait period configuration of the delinquency event type as shown below:

Wait Period	Wait Days	Wait Months	Day of Month	Trigger Month is set to…	Trigger Date is set to…
Monthly Cyclic	-	1	5	Paid Through Date + 1 Month	5th of Trigger Month
Wait Days	5	-	-	-	Paid Through Date + 5 days

If the wait period is set to **Monthly Cyclic**, you need to specify the wait months and the day of the month for each delinquency event type in the delinquency process type. However, if the wait period is set to **Wait Days**, you need to specify the wait days for each delinquency event type in the delinquency process type.

Note: The system derives the wait days or wait month and the day of the month from the delinquency process type or using an algorithm attached to the **Wait Days Derivation** system event depending on the wait period source which is specified in the delinquency process type.

If the calculated trigger date of an event is past dated, the system enables you to move the trigger date of the event to the next month. If the new trigger date is also past dated, the system keeps moving the trigger date by one month until it is a future date. You can avail this functionality for the delinquency events by selecting the **Move Past Dated Event To Future** option corresponding to the respective delinquency event type in the delinquency process type. Note that if the trigger date of an event is moved to a future date, the trigger date of the subsequent events in the delinquency process is also moved accordingly.

This is because the system is designed to trigger only one event at a time in a month. While calculating the new trigger date, the system ensures that the delinquency events are triggered in the given sequence.

Note: You can enable the **Move Past Dated Event To Future** option only when the wait period is set to **Monthly Cyclic**.

- **Usage Basis** – Used when you want to derive trigger date using either of the following dates:
  - **Delinquency Process Creation Date** – Used when you want to derive trigger date using the delinquency process creation date and the wait period. The system calculates the trigger date based on the wait period configuration of the delinquency event type as shown below:

Wait Period	Wait Days	Wait Months	Day of Month	Trigger Month is set to	Trigger Date is set to…
Monthly Cyclic	-	1	5	Delinquency Process Creation Date + 1 Month	5th of Trigger Month

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Wait Period	Wait Days	Wait Months	Day of Month	Trigger Month is set to	Trigger Date is set to…
Wait Days	15	-	-	-	Delinquency Process Creation Date + 15 days

If the wait period is set to **Monthly Cyclic**, you need to specify the wait months and the day of the month for each delinquency event type in the delinquency process type. However, if the wait period is set to **Wait Days**, you need to specify the wait days for each delinquency event type in the delinquency process type.

Note: The system derives the wait days or wait month and the day of the month from the delinquency process type or using an algorithm attached to the **Wait Days Derivation** system event depending on the wait period source which is specified in the delinquency process type.

If the calculated trigger date of an event is past dated, the system enables you to move the trigger date of the event to the next month. If the new trigger date is also past dated, the system keeps moving the trigger date by one month until it is a future date. You can avail this functionality for the delinquency events by selecting the **Move Past Dated Event To Future** option corresponding to the respective delinquency event type in the delinquency process type. Note that if the trigger date of an event is moved to a future date, the trigger date of the subsequent events in the delinquency process is also moved accordingly. This is because the system is designed to trigger only one event at a time in a month. While calculating the new trigger date, the system ensures that the delinquency events are triggered in the given sequence.

Note: You can enable the **Move Past Dated Event To Future** option only when the wait period is set to **Monthly Cyclic**.

- **Grace Start Date** - Used when you want to derive trigger date using the grace start date and the wait period. You can set the grace start date to either of the following - **Delinquency Process Creation Date**, **Latest Bill Due Date**, or **X Days after Latest Bill Due Date**. The system calculates the trigger date based on the wait period configuration of the delinquency event type.

  The following table illustrates how the trigger date is calculated using the respective grace start date and wait period combination:

Grace Start Date Basis	Wait Period	Wait Days	Wait Months	Day of Month	Add Days to Due Date	Trigger Month is set to…	Trigger Date is set to…
Delinquency Process Creation Date	Monthly Cyclic	-	1	5	-	Grace Start Date (i.e. Delinquency Process Creation Date) + 1 Month	5th of Trigger Month
Delinquency Process Creation Date	Wait Days	15	-	-	-	-	Grace Start Date (i.e. Delinquency Process Creation Date) + 15 days
Latest Bill Due Date	Monthly Cyclic	-	2	7	-	Grace Start Date (i.e. Latest Bill	7th of Trigger Month

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Grace Start Date Basis	Wait Period	Wait Days	Wait Months	Day of Month	Add Days to Due Date	Trigger Month is set to…	Trigger Date is set to…
						Due Date) + 2 Month	
Latest Bill Due Date	Wait Days	20	-	-	-	-	Grace Start Date (i.e. Latest Bill Due Date) + 20 days
X Days after Latest Bill Due Date	Monthly Cyclic	-	1	10	10	Grace Start Date (i.e. Latest Bill Due Date + 10 days) + 1 Month	10th of Trigger Month
X Days after Latest Bill Due Date	Wait Days	20	-	-	10	-	Grace Start Date (i.e. Latest Bill Due Date + 10 days) + 20 days

If the wait period is set to **Monthly Cyclic**, you need to specify the wait months and the day of the month for each delinquency event type in the delinquency process type. However, if the wait period is set to **Wait Days**, you need to specify the wait days for each delinquency event type in the delinquency process type.

Note: The system derives the wait days or wait month and the day of the month from the delinquency process type or using an algorithm attached to the **Wait Days Derivation** system event depending on the wait period source which is specified in the delinquency process type.

If the calculated trigger date of an event is past dated, the system enables you to move the trigger date of the event to the next month. If the new trigger date is also past dated, the system keeps moving the trigger date by one month until it is a future date. You can avail this functionality for the delinquency events by selecting the **Move Past Dated Event To Future** option corresponding to the respective delinquency event type in the delinquency process type.

Note that if the trigger date of an event is moved to a future date, the trigger date of the subsequent events in the delinquency process is also moved accordingly. This is because the system is designed to trigger only one event at a time in a month.

While calculating the new trigger date, the system ensures that the delinquency events are triggered in the given sequence.

Note: You can enable the **Move Past Dated Event To Future** option only when the wait period is set to **Monthly Cyclic**.

- **Latest Bill Due Date** – Used when you want to derive trigger date using the latest bill due date and the wait period. The system calculates the trigger date based on the wait period configuration of the delinquency event type.

  The following table illustrates how the trigger date is calculated using the latest bill due date and wait period combination:

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Wait Period	Wait Days	Wait Months	Day of Month	Trigger Month is set to…	Trigger Date is set to…
Monthly Cyclic	-	2	15	Latest Bill Due Date + 2 Month	15th of Trigger Month
Wait Days	25	-	-	-	Latest Bill Due Date + 25 days

If the wait period is set to **Monthly Cyclic**, you need to specify the wait months and the day of the month for each delinquency event type in the delinquency process type. However, if the wait period is set to **Wait Days**, you need to specify the wait days for each delinquency event type in the delinquency process type.

Note: The system derives the wait days or wait month and the day of the month from the delinquency process type or using an algorithm attached to the **Wait Days Derivation** system event depending on the wait period source which is specified in the delinquency process type.

If the calculated trigger date of an event is past dated, the system enables you to move the trigger date of the event to the next month. If the new trigger date is also past dated, the system keeps moving the trigger date by one month until it is a future date. You can avail this functionality for the delinquency events by selecting the **Move Past Dated Event To Future** option corresponding to the respective delinquency event type in the delinquency process type. Note that if the trigger date of an event is moved to a future date, the trigger date of the subsequent events in the delinquency process is also moved accordingly. This is because the system is designed to trigger only one event at a time in a month. While calculating the new trigger date, the system ensures that the delinquency events are triggered in the given sequence.

Note: You can enable the **Move Past Dated Event To Future** option only when the wait period is set to **Monthly Cyclic**.

Delinquency Event Types

While adding the delinquency event types in a delinquency process type, you need to specify the following:

- The delinquency event types using which you want to create the delinquency events in a delinquency process which is created using the delinquency process type
- The order in which you want to create the delinquency event using the delinquency event type
- The time period (i.e. either before or after grace end date) during which you want to trigger the delinquency events when the trigger date calculation mode is set to **Latest Bill Due Date with Grace Period**
- Whether you want the system to derive the wait days, wait months, and day of month during the trigger date calculation from the delinquency process type or through an algorithm
- The number of days for which you want to delay the delinquency event in a delinquency process
- The number of months for which you want to delay the delinquency event in a delinquency process
- The day of the month when you want to trigger the delinquency event of a delinquency process
- Whether you want the system to recalculate the trigger date of a delinquency event if it is a past dated until it is a future date
- Whether you want to preview a delinquency event which helps the relationship manager to inform the customer in advance that he will receive the To Do notification or customer contact within the specified number of days
- The number of days before the trigger date when you want to schedule a preview of a delinquency event
- Whether you want the system to skip the delinquency event in a delinquency process which is past dated
- Whether you want the system to check whether a delinquency event type is eligible for an account and then accordingly create the delinquency event using the delinquency event type

Note: The list includes only those rule types where the rule type usage is set to **Delinquency Event Type Eligibility**.

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Delinquency Process Type Algorithms

While creating a delinquency process type, you need to attach the following algorithms to the respective system event:

System Event	Algorithm	Algorithm Description
Calculate Unpaid and Original Amounts	C1-CUAOAB	Refer to C1-CUAOAB on page 4150
Cancel Criteria	C1-CANDELPRC	Refer to C1-CANDELPRC on page 4150
Cancel Criteria	C1-CANDPAPTC	Refer to C1-CANDPAPTC on page 4152
Grace Period Derivation	C1-DERGRBR	Refer to C1-DERGRBR on page 4152
Hold Delinquency Process Criteria	C1-HLDDELPRC	Refer to C1-HLDDELPRC on page 4153
Memberships Derivation	C1-MEMBDLQ	Refer to C1-MEMBDLQ on page 4154
Policies Derivation	C1-POLDLQPA	Refer to C1-POLDLQPA on page 4155
Release Delinquency Process Criteria	C1-RELDELPRC	Refer to C1-RELDELPRC on page 4155
Send Member Level Notification Option Derivation	C1-DERMLNBR	Refer to C1-DERMLNBR on page 4156
Termination Date Rule Derivation	C1-DERTRBR	Refer to C1-DERTRBR on page 4157
Termination and Reinstatement Configuration Derivation	C1-DERTROBR	Refer to C1-DERTROBR on page 4157
Trigger Date Recalculation Option Derivation	C1-DERRTDBR	Refer to C1-DERRTDBR on page 4158
Wait Days Derivation	C1-DERWDBR	Refer to C1-DERWDBR on page 4158

C1-CUAOAB

This algorithm derives the original and unpaid amounts for each overdue bill of the person or account whose debt is monitored. It invokes an algorithm created using the **C1-OI-BI-AMT** algorithm type attached to the **Determine Open Item Bill Amounts** system event in the installation options to calculate the original and unpaid amounts for a bill.

Note: This algorithm is required when the collection object in the delinquency process type is set to **Bill**. The **C1-CUAOAB** algorithm is invoked from the following algorithms - **C1-DLNQMNRL**, **C1-RODPDUEPX**.

C1-CANDELPRC

This algorithm cancels the delinquency process when either of the following condition is met:

- Payments or adjustments are made against the overdue bills, for which the delinquency process is created, and as a result the unpaid balance of the overdue bills is within the tolerance limit
- Collection class of the account, for which the delinquency process is created, is changed

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- Voluntary termination is received for an individual membership (which is billed to the delinquent account) with a termination date that is earlier than or equal to the calculated termination date
- Voluntary cancellation is received for an individual membership (which is billed to the delinquent account)
- Individual membership is canceled through an inbound message but its corresponding delinquency process is still in the **Delinquency In Progress** status

It contains the following parameters:

- **Tolerance Percentage** - Used to specify the unpaid percentage value (i.e. unpaid amount with respect to original amount). The system cancels the delinquency process when the unpaid percentage of the overdue bills is within the tolerance limit. This parameter is required.
- **Tolerance Amount** - Used to specify the flat unpaid amount. The system cancels the delinquency process when the unpaid amount of the overdue bills is within the tolerance limit. This parameter is required.
- **Tolerance Amount and Percentage Required (Y / N)** - Used to indicate whether you want to consider both the unpaid amount and unpaid percentage to check whether the delinquency process should be canceled or not. The valid values are:
  - **Y** - If you set the value to **Y**, the system considers both the unpaid amount and the unpaid percentage to check whether the delinquency process should be canceled or not.
  - **N** - If you set the value to **N**, the system considers either the unpaid amount or the unpaid percentage to check whether the delinquency process should be canceled or not.

  This parameter is mandatory.
- **Include On Account Payments In Threshold Evaluation - (Y/N)** - Used to indicate whether you want to consider the payments made against the on account contracts of the account while calculating the unpaid amount. The valid values are **Y** and **N**.
- **On Account Payment Contract Type (Comma separated valid values)** - Used to indicate the on account contract types that you want to consider while determining the total unpaid amount. You can specify maximum twenty comma-separated values for this parameter. This parameter is only required when the **Include On Account Payments In Threshold Evaluation - (Y/N)** parameter is set to **Y**.
- **Use Current Revenue Period Billed For Latest Overdue Due Date In Threshold Evaluation - (Y/N)** – Used to indicate whether the system should calculate the unpaid percentage or amount based on the total amount billed for the coverage period or based on the total amount billed for the overdue bills. The valid values are:
  - **Y** – Used when you want to calculate the unpaid percentage or amount based on the total amount billed for the coverage period.
  - **N** – Used when you want to calculate the unpaid percentage or amount based on the total amount billed for the overdue bills.

  This parameter is optional. If you do not specify the parameter value, by default, it is set to **N**.
- **Which Date Determines Age ('D' - Due Date or 'B' - Bill Date)** - Used to indicate whether you want the system to determine the age of the invoice (i.e. bill) using the bill date or the due date. The valid values are **D** and **B**. This parameter is mandatory.
- **Only Process Bills with an Age >= This Value** - Used to specify the number of days. The system considers an overdue bill of the delinquency process only when the invoice age is greater than or equal to the specified number of days. This parameter is optional.
- **Delinquency Process Cancel Reason for Unpaid Amount Reduction** – Used to indicate the cancel reason that you want to use while canceling a delinquency process when the unpaid amount and/or percentage is within the tolerance limit. Here, you must specify a reason which is defined for the **Canceled** status of the **C1-DelinquencyProcess** business object through the **Status Reason** screen.
- **Delinquency Process Cancel Reason for Collection Class Change** - Used to indicate the cancel reason that you want to use while canceling a delinquency process when the collection class of the account is changed. Here, you must specify a reason which is defined for the **Canceled** status of the **C1-DelinquencyProcess** business object through the **Status Reason** screen.
- **Delinquency Process Cancel Reason for Voluntary Termination** – Used to indicate the cancel reason that you want to use while canceling a delinquency process when an individual membership billed to the account is voluntarily

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terminated by the customer on or before the calculated termination date. Here, you must specify a reason which is defined for the **Canceled** status of the **C1-DelinquencyProcess** business object through the **Status Reason** screen.

- **Delinquency Process Cancel Reason for Membership Cancelation** - Used to indicate the cancel reason that you want to use while canceling a delinquency process when an individual membership billed to the account is voluntarily canceled by the customer. Here, you must specify a reason which is defined for the **Canceled** status of the **C1-DelinquencyProcess** business object through the **Status Reason** screen.
- **Evaluate Customer Status when all Events are Completed** – Used when you want the system to evaluate whether an individual membership billed to the delinquent account is voluntarily terminated or canceled by the customer even when all the events in the delinquency process are in the **Completed** status. The valid values are **Y** and **N**. This parameter is mandatory.

  If you set this parameter value to **N**, the system will evaluate whether an individual membership billed to the delinquent account is voluntarily terminated or canceled by the customer until all the events in the delinquency process are in the **Completed** status and not after all the events in the delinquency process are in the **Completed** status.

Note: The cancellation criteria only consider the bills that were due on or before the delinquency process was created. This is because the grace period is determined based on the latest due date. From a business perspective, the system should ensure that a customer is given sufficient grace period for the unpaid invoices.

C1-CANDPAPTC

This algorithm is used only for the fully insured individual business. It considers a delinquency process for cancellation when either of the following condition is met:

- Membership benefit charges is billed in the earliest unpaid coverage period and now the benefit charge is no longer applicable from the earliest unpaid coverage period.
- Membership benefit charges was not billed in the earliest unpaid coverage period, but the benefit charge is now applicable from the earliest unpaid coverage period.

Note: This algorithm is invoked by the **C1-DPMON** batch. If any of the above cancel criteria is met, the system changes the status of the delinquency process to **Canceled** when the **C1-DPMON** batch is executed.

This algorithm checks whether there is any bill in the delinquency process with the due date earlier than the delinquency due date. If so, the system does the following:

- Add a record for the delinquent account in **CI_ADM_RVW_SCH** table.
- The next credit review date of the account is set to the processing date (i.e., batch business date).

Note: The system will create a delinquency process for the account using the appropriate delinquency process type when the **C1-ACDLQ** batch is executed subsequently.

It contains the following parameters:

- **Delinquency Process Cancel Reason For APTC Benefit Update** – Used to indicate the cancel reason that you want to use while canceling a delinquency process. This parameter is optional. Here, you must specify a reason which is defined for the **Canceled** status of the **C1-DelinquencyProcess** business object through the **Status Reason** screen.
- **Delinquency Process Type Field Mapping – Individual** – Used to specify a preference where the preference category is set to **Delinquency Process Type**. The system uses the preference to determine the benefit sub type whose benefits should be monitored for applicability in the earliest unpaid coverage period. This parameter is mandatory. For more information about the delinquency process type preference, see Delinquency Process Preference on page 4295.

C1-DERGRBR

This algorithm is required when the **Grace Period Source** flag in the delinquency process type is set to **Algorithm**. It retrieves the business rules of the **Delinquency Grace Period Business Rule** category which are effective on the processing date when the **C1-DPEVTCR** algorithm is invoked. Note that the system considers only those effective business rules which are in the **Active** status.

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Once the effective business rules are identified, the system executes these business rules in the order of their priority. Once an individual membership meets the criteria defined in the business rule, the business rule is stamped against the individual membership. The system then derives the **Grace Period (Days)** flag from the business rule.

The system then checks the grace period of each active individual membership and sets the grace period of the delinquency event to the value derived for the membership with the maximum grace days.

Note: The system derives the individual memberships using an algorithm which is attached to the **Memberships Derivation** system event of the delinquency process type.

C1-HLDDELPRC

This algorithm holds a delinquency process when any of the following conditions are met:

- Postpone credit review date stamped on the delinquent account is later than the system date
- One or more promise to pay are active for the delinquent account
- A payment agreement request is active for the delinquent account

It is invoked by the **C1-DPMON** batch. If the postpone credit review date of the account is later than the system date, and/or if an active payment agreement request exists for the delinquent account, and/or if one or more promise to pay are active for the delinquent account, the system determines the hold end date. While determining the hold end date, it considers the date which is the latest of the following:

- Postpone credit review date
- Latest schedule date specified in the payment agreement request
- Latest schedule date specified among all the active promise to pay
- Hold end date manually specified in the delinquency process

If the derived hold end date is later than the system date, then the system does the following:

- Sets the status of the delinquency process to the value specified in the **Delinquency Process Hold Status** attribute of the delinquency process preference.

  Note: The system considers the delinquency process preference which is specified in the **Delinquency Process Field Mapping** option type of the **DELINPROC** feature configuration. For more information about the feature configuration, see Setting the DELINPROC Feature Configuration on page 4442.
- Sets the hold start date to a date which is earliest of the following:
  - If the postpone credit review date of the account is later than the system date, the system uses the processing date as the hold start date.
  - If an active payment agreement request exists for the delinquent account, the system uses the date when the payment agreement request was set to the **Active** status as the hold start date.
  - If one or more promise to pay are active for the delinquent account, the system uses the earliest schedule date among all the active promise to pay as the hold start date.
- Sets the hold reason depending on whether the system considers either of the following as the hold end date:
  - Postpone credit review date
  - Latest schedule date specified in the payment agreement request
  - Latest schedule date specified among all the active promise to pay
  - Hold end date manually specified in the delinquency process
- Sets the mode of hold for the delinquency process to **Systematic**

This algorithm contains the following parameters:

- **Hold Request Reason** – Used to indicate the reason that you want to use while holding a delinquency process. The system considers this reason when the hold end date is to set to the postpone credit review date of the account.

  Note: Here, you must specify the reason which is defined for the **On Hold** status of the **C1-DelinquencyProcess** business object.

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- **Promise To Pay Reason** – Used to indicate the reason that you want to use while holding a delinquency process. The system considers this reason when the hold end date is set to the latest schedule date specified in the payment agreement request.

  Note: Here, you must specify the reason which is defined for the **On Hold** status of the **C1-DelinquencyProcess** business object.

- **Payment Agreement Reason** – Used to indicate the reason that you want to use while holding a delinquency process. The system considers this reason when the hold end date is set to the latest schedule date specified among all the active promise to pay.

  Note: Here, you must specify the reason which is defined for the **On Hold** status of the **C1-DelinquencyProcess** business object.

All the parameters are mandatory.

C1-MEMBDLQ

This algorithm fetches those individual memberships where details of the account, for which the delinquency process is created, are stored as the characteristics on the individual memberships. While fetching the individual memberships which are billed to delinquent account, the system considers the characteristic types which are specified in the **Account Identifier Type Char Type** and **Account Identifier Type Char Value** option types of the **C1-ASOBLLNG** feature configuration.

Once the individual memberships are derived, the system considers only those memberships where the status is set to the value specified in the **Membership Active Status** or **Membership Terminated Status** option type of the **C1-ASOBLLNG** feature configuration depending on from where the algorithm is invoked.

This algorithm then derives a preference where the preference category is set to **Individual Membership**. It checks whether the characteristic type specified in the **Active Selection Characteristics** attribute of the preference is defined on any of the derived active individual memberships.

Note: If a characteristic of the specified characteristic type exists on an individual membership, it means that the individual membership is created for the next year's coverage. However, if a characteristic of the specified characteristic type does not exist on an individual membership, it means that the individual membership is created for the current year's coverage.

If the account selection characteristic exists on the active individual membership, the system checks whether the characteristic's effective date is later than or equal to the membership start date. If the characteristic's effective date is later than or equal to the membership start date, the system checks whether the paid through date is stamped on the account.

If the paid through date is stamped on the account, the system checks whether the membership start date is later than the paid through date. If the membership start date is later than the paid through date, the system derives the following:

- Sum of the following payments
  - Payment made against the on account contracts
  - Payments made against the coverage period that falls after the paid through date
- Premium for the first coverage period of the individual membership (which is created for the next year's coverage)

The system then compares the premium of the first coverage period against the sum of payments. If the payment is sufficient to pay the first coverage period premium, the system sets the **Evaluate Guaranteed Availability** flag of the individual membership to **true**.

However, if the account selection characteristic is not defined on the individual membership or if the account selection characteristic's effective date is earlier than the membership start date or if the paid through date is not stamped on the account or if the individual membership start date is earlier than or equal to the paid through date, or if the payment is not sufficient to pay the first coverage premium for the next year's membership, then the system sets the **Evaluate Guaranteed Availability** flag of the individual membership to **false**.

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This algorithm contains the following parameter:

- **On Account Payment Contract Types** – Used to indicate the contract types whose contracts you want to consider while deriving the on account payments. This parameter is required.

Note: This algorithm is only applicable for the fully insured individual business.

C1-POLDLQPA

This algorithm derives the list of policies for a delinquency process. If the delinquency process is created at the account level, this algorithm derives the main customer of the account and then fetches all the policies where the main customer is added as a policy person in the policy.

If the delinquency process is created at the person level, this algorithm derives all the policies where the person and its child persons are added as a policy person in the policy. Note that the algorithm considers only those child persons in the person's hierarchy for whom the collection method in the respective collection class is set to **Parental Delinquency**.

Note: If the status is passed through the calling algorithm, the policy list is filtered based on the given status. This algorithm is applicable only for the fully insured group business.

C1-RELDELPRC

This algorithm monitors a delinquency process which is on hold and determines whether the hold end date of the delinquency process should be updated or whether the hold on the delinquency process should be released. It is invoked by the **C1-DPMON** batch.

If the postpone credit review date of the account is earlier than or equal to the system date, and if an active payment agreement request does not exist for the delinquent account, and if none of the promise to pay are active for the delinquent account, the system determines whether the hold end date is manually updated by the user. If the hold end date is manually updated by the user, the system sets the mode of hold for the delinquency process to **Manual**. However, if the hold end date is not updated manually by the user or if the manually specified hold end date is earlier than or equal to the system date, the system sets the status of the delinquency process to the value specified in the **Delinquency Process Released Status** attribute of the delinquency process preference.

Note: The system considers the delinquency process preference which is specified in the **Delinquency Process Field Mapping** option type of the **DELINPROC** feature configuration. For more information about the feature configuration, see Setting the DELINPROC Feature Configuration on page 4442.

If the postpone credit review date of the account is later than the system date, and/or if an active payment agreement request exists for the delinquent account, and/or if one or more promise to pay are active for the delinquent account, the system determines the hold end date. While determining the hold end date, it considers the date which is the latest of the following:

- Postpone credit review date
- Latest schedule date specified in the payment agreement request
- Latest schedule date specified among all the active promise to pay
- Hold end date manually specified in the delinquency process

If the derived hold end date is later than the system date and if the derived hold end date is later than the existing hold end date, then the existing hold end date is updated to the derived hold end date. The hold reason is also updated depending on whether the system considers either of the following as the hold end date:

- Postpone credit review date
- Latest schedule date specified in the payment agreement request
- Latest schedule date specified among all the active promise to pay

In addition, the system sets the mode of hold for the delinquency process to **Systematic**.

This algorithm contains the following parameters:

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- **Hold Request Reason** - Used to indicate the reason that you want to use while holding a delinquency process. The system considers this reason when the hold end date is to set to the postpone credit review date of the account. Here, you must specify the reason which is defined for the **On Hold** status of the **C1-DelinquencyProcess** business object.
- **Promise To Pay Reason** - Used to indicate the reason that you want to use while holding a delinquency process. The system considers this reason when the hold end date is set to the latest schedule date specified in the payment agreement request. Here, you must specify the reason which is defined for the **On Hold** status of the **C1-DelinquencyProcess** business object.
- **Payment Agreement Reason** - Used to indicate the reason that you want to use while holding a delinquency process. The system considers this reason when the hold end date is set to the latest schedule date specified among all the active promise to pay. Here, you must specify the reason which is defined for the **On Hold** status of the **C1-DelinquencyProcess** business object.

All the parameters are mandatory.

C1-DERMLNBR

This algorithm is required when the **Send Membership Level Notification Source** field corresponding to the respective delinquency event type in the respective delinquency process type is set to **Algorithm**.

If the delinquency process is created at the account level, this algorithm derives the main customer of the respective account. However, if the delinquency process is created at the person level, this algorithm derives the respective person. It then derives all the active individual memberships where the main customer is added as the member person.

If no active individual membership is derived for the main customer, this algorithm derives all the active policies where the main customer or the person is added as the policy person in the respective policies. If the person is a bill group, the system considers the policies where the bill group is added as a policy person using the role which is specified in the **Bill Group Policy Person Role** option type of the **C1-ASOBLLNG** feature configuration. However, if no active policy is derived for the bill group, this algorithm considers all the active policies where the parent customer of the bill group is added as a policy person using the role which is specified in the **Parent Customer Policy Person Role** option type of the **C1-ASOBLLNG** feature configuration.

However, if the person is a parent customer, the system considers all the active policies where the parent customer is added as a policy person using the role which is specified in the **Parent Customer Policy Person Role** option type of the **C1-ASOBLLNG** feature configuration.

Note:

While deriving an active individual membership, the system considers the status code which is specified in the **Membership Active Status** option type of the **C1-ASOBLLNG** feature configuration.

Similarly, while deriving an active policy, the system considers the status code which is specified in the **Policy Active Status** option type of the **C1-ASOBLLNG** feature configuration.

Once the list of active policies or individual memberships is derived, this algorithm retrieves the business rules of the **Delinquency Event Attributes Business Rule** category which are effective when the event is triggered manually from the user interface or automatically through the **C1-DPMON** batch. Note that the algorithm considers only those effective business rules which are in the **Active** status.

Once the effective business rules are identified, this algorithm executes these business rules in the order of their priority. Once a policy or individual membership meets the criteria defined in the business rule, the system refers the business rule for the policy or individual membership. This algorithm then derives the value of the **Send Membership Level Notification** parameter from the business rule.

It then checks whether the **Send Membership Level Notification** parameter is set to **Send Membership Level Notification Required** for at least one policy or individual membership billed to the delinquent customer or account. If so, the algorithm sets the **Send Membership Level Notification** parameter for the delinquency event to **Send Membership Level Notification Required**. However, if the **Send Membership Level Notification** parameter is set to **Send Membership Level Notification Not Required** for all the policies or individual memberships billed to the delinquent customer or account, the algorithm sets the **Send Membership Level Notification** parameter for the delinquency event to **Send Membership Level Notification Not Required**.

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C1-DERTRBR

This algorithm is invoked by the **C1-DETTERMDT** algorithm when the event is triggered to send a termination request manually from the user interface or automatically through the **C1-DPMON** batch.

If the delinquency process is created at the account level, this algorithm derives the main customer of the respective account. However, if the delinquency process is created at the person level, this algorithm derives the respective person. It then derives all the active individual memberships where the main customer is added as the member person.

If no active individual membership is derived for the main customer, this algorithm derives all the active policies where the main customer or the person is added as the policy person in the respective policies. If the person is a bill group, the system considers the policies where the bill group is added as a policy person using the role which is specified in the **Bill Group Policy Person Role** option type of the **C1-ASOBLLNG** feature configuration.

However, if no active policy is derived for the bill group, this algorithm considers all the active policies where the parent customer of the bill group is added as a policy person using the role which is specified in the **Parent Customer Policy Person Role** option type of the **C1-ASOBLLNG** feature configuration.

However, if the person is a parent customer, the system considers all the active policies where the parent customer is added as a policy person using the role which is specified in the **Parent Customer Policy Person Role** option type of the **C1-ASOBLLNG** feature configuration.

Note:

While deriving an active individual membership, the system considers the status code which is specified in the **Membership Active Status** option type of the **C1-ASOBLLNG** feature configuration.

Similarly, while deriving an active policy, the system considers the status code which is specified in the **Policy Active Status** option type of the **C1-ASOBLLNG** feature configuration.

Once the list of active policies or individual memberships is derived, this algorithm retrieves the business rules of the **Delinquency Termination Date Rule Business Rule** category which are effective on the trigger date. Note that the system considers only those effective business rules which are in the **Active** status. Once the effective business rules are identified, the system executes these business rules in the order of their priority.

Once a policy or individual membership meets the criteria defined in the business rule, the system refers the business rule for the policy or individual membership. This algorithm then derives the value of the **Termination Date Rule** parameter from the business rule. For each active policy which is billed to the delinquent person or account, the system derives the value of the **Termination Date Rule** parameter. Similarly, for each active individual membership which is billed to the delinquent account, the system derives the value of the **Termination Date Rule** parameter.

Among the termination date rules derived for different policies or individual memberships, this algorithm considers the termination date rule which is given the highest priority in the respective delinquency process type and uses it for further processing in the delinquency event.

C1-DERTROBR

This algorithm is invoked by the **C1-DETTRTGDT** and **C1-RECALCHLD** algorithms when the **Termination Reinstatement Configuration Source** flag in the delinquency process type is set to **Algorithm**. It retrieves the business rules of the **Delinquency Miscellaneous Options Business Rule** category which are effective on the batch business date. Note that the system considers only those effective business rules which are in the **Active** status. Once the effective business rules are identified, the system executes these business rules in the order of their priority. Once an individual membership meets the criteria defined in the business rule, the business rule is stamped against the individual membership. The system then derives the value for the **Trigger Termination Process** flag and the termination wait days from the business rule.

The system checks whether the **Trigger Termination Process** flag is set to **Immediate** for all the active individual memberships which are billed to the delinquent account. If so, the system sets the termination request date of the delinquency event to the termination event trigger date and the **Trigger Termination Process** flag of the delinquency event to **Immediate**.

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However, if the **Trigger Termination Process** flag is set to **Month End** or **After X Days** for any or all the active memberships, the system calculates the termination request date for each active membership and then considers the latest termination request date of the individual membership.

The system sets the termination request date of the delinquency event to the latest termination request date of an active membership and sets the **Trigger Termination Process** flag of the delinquency event to the value derived for the membership with the latest termination request date.

Note: The system derives the individual memberships using an algorithm which is attached to the **Memberships Derivation** system event of the delinquency process type.

C1-DERRTDBR

This algorithm is required when the **Trigger Date Recalculation on Hold Release Source** flag or **Trigger Date Recalculation on Resume Source** flag in the delinquency process type is set to **Algorithm**. It retrieves the business rules of the **Delinquency Miscellaneous Options Business Rule** category which are effective on the batch business date while executing the **C1-DPMON** batch. Note that the system considers only those effective business rules which are in the **Active** status.

Once the effective business rules are identified, the system executes these business rules in the order of their priority. Once an individual membership meets the criteria defined in the business rule, the business rule is stamped against the individual membership. The system then derives the value for the **Trigger Date Recalculation on Hold Release** or **Trigger Date Recalculation on Resume** flag, respectively, from the business rule.

For each active individual membership which is billed to the delinquent account, the system checks the value of the **Trigger Date Recalculation on Hold Release** flag while releasing the hold on the delinquency process. If the **Trigger Date Recalculation on Hold Release** flag is set to **Yes** for at least one active membership, the system sets the **Trigger Date Recalculation on Hold Release** flag of the delinquency event to **Yes**. However, if the **Trigger Date Recalculation on Hold Release** flag is set to **No** for all active memberships, the system sets the **Trigger Date Recalculation on Hold Release** flag of the delinquency event to **No**.

Similarly, for each active individual membership which is billed to the delinquent account, the system checks the value of the **Trigger Date Recalculation on Resume** flag while resuming the delinquency process. If the **Trigger Date Recalculation on Resume** flag is set to **Yes** for at least one active membership, the system sets the **Trigger Date Recalculation on Resume** flag of the delinquency event to **Yes**. However, if the **Trigger Date Recalculation on Resume** flag is set to **No** for all active memberships, the system sets the **Trigger Date Recalculation on Resume** flag of the delinquency event to **No**.

Note: The system derives the individual memberships using an algorithm which is attached to the **Memberships Derivation** system event of the delinquency process type.

C1-DERWDBR

This algorithm is required when the **Wait Period Source** field corresponding to the respective delinquency event type in the respective delinquency process type is set to **Algorithm**. If the delinquency process is created at the account level, this algorithm derives the main customer of the respective account. However, if the delinquency process is created at the person level, this algorithm derives the respective person. It then derives all the active individual memberships where the main customer is added as the member person. If no active individual membership is derived for the main customer, this algorithm derives all the active policies where the main customer or the person is added as the policy person in the respective policies.

If the person is a bill group, the system considers the policies where the bill group is added as a policy person using the role which is specified in the **Bill Group Policy Person Role** option type of the **C1-ASOBLLNG** feature configuration. However, if no active policy is derived for the bill group, this algorithm considers all the active policies where the parent customer of the bill group is added as a policy person using the role which is specified in the **Parent Customer Policy Person Role** option type of the **C1-ASOBLLNG** feature configuration.

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However, if the person is a parent customer, the system considers all the active policies where the parent customer is added as a policy person using the role which is specified in the **Parent Customer Policy Person Role** option type of the **C1-ASOBLLNG** feature configuration.

Note:

While deriving an active individual membership, the system considers the status code which is specified in the **Membership Active Status** option type of the **C1-ASOBLLNG** feature configuration.

Similarly, while deriving an active policy, the system considers the status code which is specified in the **Policy Active Status** option type of the **C1-ASOBLLNG** feature configuration.

Once the list of active policies or individual memberships is derived, this algorithm retrieves the business rules of the **Delinquency Event Attributes Business Rule** category which are effective on the batch business date while executing the **C1-DPEVL** batch. Note that the system considers only those effective business rules which are in the **Active** status.

Once the effective business rules are identified, this algorithm executes these business rules in the order of their priority. Once a policy or individual membership meets the criteria defined in the business rule, the system refers the business rule for the policy or individual membership. This algorithm then derives the wait days or wait month and day of month from the business rule depending on the wait period that is configured in the respective delinquency process type.

For each active policy which is billed to the delinquent person or account, the system derives the wait days or wait month and day of month. Similarly, for each active individual membership which is billed to the delinquent account, the system derives the wait days or wait month and day of month. Among the wait days or wait months derived for different policies or individual memberships, this algorithm considers the wait days or wait months which is maximum and uses it for further processing in the delinquency event.

C1-DERMNDAYS

This algorithm will invoke the delinquency process Business Rules to derive the Member Notification Days for the delinquency process.

Note: The **C1-DERMNDAYS** algorithm type is shipped with the product. You must attach an algorithm created using the **C1-DERMNDAYS** algorithm type to the **Membership Notification Days Derivation** system event defined for the delinquency process type.

Grace Period Configuration

While creating a delinquency process type, you need to specify the following grace details using which the system calculates the trigger date for a delinquency event in the delinquency process:

- Whether you want the system to derive the grace period (in days) to calculate grace end date from the delinquency process type or through an algorithm
- The number of days of grace you want to offer from the grace start date
- Whether you want the system to set either of the following as the grace start date when the **Trigger Date Calculation Mode** flag is set to **Usage Basis** and the **Usage Basis** flag is set to **Grace Start Date**:
  - **Delinquency Process Creation Date** – Used when you want to set the grace start date to the date when the delinquency process is created in the system.
  - **Latest Bill Due Date** – Used when you want to set the grace start date to the latest due date of a bill when there are one or more overdue bills for which the delinquency process is initiated.
  - **X Days after Latest Bill Due Date** – Used when you want to set the grace start date after X number of days from the latest bill due date. You can specify the X number of days in the **Add Days To Due Date** field.

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Termination and Reinstatement Configuration

While creating a delinquency process type, you need to specify the following details using which you want to calculate the termination request date:

- Whether you want the system to derive the value for the **Trigger Termination Process** flag and the termination wait days from the delinquency process type or through an algorithm
- Whether you want to send an outbound message to the enrollment system for terminating the individual memberships billed to the delinquent account immediately, at the end of the month when the termination event is triggered, or after X number of days (i.e. termination wait days)

Note:

The **Allow Automatic Reinstatement**, **Maximum Automatic Reinstatement Count**, **Trigger Reinstatement Process**, **Reinstatement Wait Days**, **Reinstatement Threshold**, **Days Since Termination**, **Membership Notification Days Source**, and **Member Notification Days** fields are not applicable for the fully insured individual business.

Also, the **Termination Reasons For Automatic Reinstatement** section is not applicable for the fully insured individual business.

Termination Date Rule Priority

While creating a delinquency process type, you need to define the priority for each termination date rule based on the requirements. The system will then consider the termination date rule in the order of its priority. For example, if you have set the following priority in the DT1 delinquency process type:

Termination Date Rule	Priority
Latest Billed Coverage End Date	10
Latest Due Coverage End Date	20
X days After Paid Through Date	30
X Months After Paid Through Date	40
Month End of Grace Period Start	50
Month End of Termination Letter Creation	60
Month End of Termination Request Event	70
X days After Grace End Date	80
X days After Termination Request Event	90

Let us assume that the A1 account is used to bill the M1 and M2 individual memberships. Now, when the A1 account is delinquent, the system derives the **X days After Paid Through Date** terminate date rule for the M1 membership and the **X days After Grace End Date** termination date rule for the M2 membership using the business rules. The system then considers the termination date rule with the highest priority defined in the respective delinquency process type. In this case, the **X days After Paid Through Date** termination date rule has higher priority than the **X days After Grace End Date** termination date rule, and therefore the system sets the termination date rule of the delinquency event to **X days After Paid Through Date**.

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Trigger Date Recalculation Configuration

The system enables you to recalculate trigger dates of the events when a delinquency process which is on hold is released. To enable this feature, you need to specify the following details while creating the respective delinquency process type:

- Whether you want the system to derive the value for the **Trigger Date Recalculation on Hold Release** flag from the delinquency process type or through an algorithm
- Whether you want to recalculate trigger dates of the events when a delinquency process which is on hold is released

Similarly, the system enables you to recalculate trigger dates of the events when a delinquency process which is canceled is resumed. To enable this feature, you need to specify the following details while creating the respective delinquency process type:

- Whether you want the system to derive the value for the **Trigger Date Recalculation on Resume** flag from the delinquency process type or through an algorithm
- Whether you want to recalculate trigger dates of the events when a delinquency process which is canceled is resumed

Approval Configuration

The system enables you to configure the approval process for various actions that you can perform for a delinquency process. For example, the system can initiate the approval process when a user manually holds a delinquency process. Note that you can configure the approval process only for any manual intervention in the delinquency process. To configure the approval process, you need to specify the following details while creating a delinquency process type:

- Whether the approval process must be initiated or not when a user performs certain actions
- The To Do type using which you want to create a To Do for the approver
- The To Do role which indicates the users for whom the To Do should be created
- The user actions for which you want to configure the approval process

You can configure the approval process for the following actions which can be manually performed by a user:

- Cancel
- Edit Hold
- Edit Trigger Date
- Hold
- Release Hold
- Request Reinstatement
- Skip Event
- Trigger Event

Delinquency Process Types Based on Insurance Coverage

The system enables you to configure a delinquency process type for each insurance coverage type through the delinquency process type preference. The system then creates a delinquency process using the respective delinquency process type whenever the person’s or account’s debt is overdue.

The system enables you to specify a delinquency process type for each insurance coverage type in the respective attribute of a delinquency process type preference:

The following table lists how you can specify a delinquency process type for each insurance coverage type in the respective attribute of a delinquency process type preference:

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Line of Business	Insurance Coverage Type	Attribute
Fully Insured Group	Active Health Plan Coverages	Active Group Customers – Account Level (used when the delinquency is monitored at the account level)
		Active Group Customers – Person Level (used when the delinquency is monitored at the person level)
	Inactive Health Plan Coverages	Inactive Group Customers – Account Level (used when the delinquency is monitored at the account level)
		Inactive Group Customers – Person Level (used when the delinquency is monitored at the person level)
Fully Insured Individual	Active Health Plan Coverages	Active Individual Delinquency
	Non-Medical Health Plan Coverages	Effectuated Individual Delinquency for Ancillary
	Medical Health Plan Coverages without Benefits	Effectuated Individual without Benefit
	Medical Health Plan Coverages with Benefits	Effectuated Individual with Benefit
		Note: The system considers this delinquency process type only when the membership benefits created using the benefit sub type specified in the delinquency process type preference are billed for the earliest unpaid coverage period.
	Non-Effectuated Health Plan Coverages	Non-Effectuated Individual Delinquency
	Inactive Health Plan Coverages	Termed Individual Delinquency
Direct Billed Group Membership	Non-Effectuated Health Plan Coverages	Non-Effectuated Individual Delinquency
	Active Health Plan Coverages	Active Group Customers – Account Level
	Inactive Health Plan Coverages	Inactive Group Customers – Account Level

For more information, see Delinquency Process Type Preference on page 4282. You need to create a separate delinquency process type preference for each line of business (i.e., Fully Insured Group, Fully Insured Individual, and Direct Billed Group Membership).

In the fully insured individual business, there might be scenarios wherein an individual customer may shift from to a medical health plan coverage without benefits to a medical health plan coverage with benefits and vice versa. In such cases, the system enables you to send the revised benefit data through a health care inbound message. On repricing, either the new billable charges are created for the membership benefit, or the existing billable charges of the membership benefit are updated. The system automatically cancels a delinquency process when either of the following condition is met:

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- Membership benefit charges is billed in the earliest unpaid coverage period and now the benefit charge is no longer applicable from the earliest unpaid coverage period.
- Membership benefit charges was not billed in the earliest unpaid coverage period, but the benefit charge is now applicable from the earliest unpaid coverage period.

The above two cancel criteria are validated by the **C1-CANDPAPTC** algorithm that is attached to the **Cancel Criteria** system event of the respective delinquency process type. This algorithm is invoked when the **C1-DPMON** batch is executed. If any of the above two conditions is met, the system cancels the existing delinquency process in the **C1-DPMON** batch.

The **C1-CANDPAPTC** algorithm also checks whether there is any bill in the delinquency process with the due date earlier than the delinquency due date. If so, the system does the following:

- Add a record for the delinquent account in the **CI_ADM_RVW_SCH** table.
- The next credit review date of the account is set to the processing date (i.e., batch business date).

The system will create a delinquency process for the account using the appropriate delinquency process type when the **C1-ACDLQ** batch is executed subsequently.

Delinquency Event Eligibility Evaluation and Trigger Date Calculation

After executing the **C1-ACDLQ** batch, you need to execute the **C1-DPEVL** batch. The **C1-DPEVL** batch is used to monitor or check whether there is any delinquency process in the status (for example, **Initiated**) which is specified in the **Delinquency Process Initiated Status** attribute of the delinquency process preference. Note that this batch considers the preference which is specified in the **Delinquency Process Field Mapping** option type of the **DELINPROC** feature configuration. For more information about the feature configuration, see Setting the DELINPROC Feature Configuration on page 4442.

If there is a delinquency process in the **Initiated** status, the system checks whether its delinquency event trigger mode is set to **Automatic** or **Manual or Automatic** in the respective delinquency process type. If its delinquency event trigger mode is set to **Manual** in the respective delinquency process type, the batch does not consider the delinquency process for the delinquency event eligibility evaluation and trigger date calculation. However, if its delinquency event trigger mode is set to **Automatic** or **Manual or Automatic** in the respective delinquency process type, the system checks whether the trigger dates exist for the delinquency events. If the trigger dates exist for the delinquency events of a delinquency process, the batch does not consider the delinquency process for the delinquency event eligibility evaluation and trigger date calculation. However, if the trigger dates does not exist for the delinquency events of a delinquency process, the batch continues with the delinquency event eligibility evaluation for each delinquency event in the delinquency process.

While evaluating whether the delinquency event is eligible to be included in the delinquency process, the system checks whether the rule type is specified corresponding to the delinquency event type in the respective delinquency process type. If the rule type is specified corresponding to the delinquency event type, the system checks whether the delinquency entity type of the delinquency process is set to **Account** and the delinquency category is set to **Individual**. If so, the system derives the individual memberships which are billed to the delinquent account using an algorithm which is attached to the **Memberships Derivation** system event of the respective delinquency process type.

Once the individual memberships are derived for the account, the system derives the health plan for which the individual membership is availed. Once the health plan is derived for each individual membership, the system derives the rules created using the rule type (which is specified to corresponding to the delinquency event type) from the rules engine which are effective on the batch business date. The effective rules are executed in the order of their priority. If at least one individual membership satisfies the rule, the delinquency event is retained in the delinquency process. However, if none of the individual memberships satisfy the rule, the delinquency event is removed from the delinquency process.

Once the delinquency event eligibility evaluation is done for each delinquency event, the system does the following:

- Derives the wait days or wait month and the day of the month from the delinquency process type or using an algorithm attached to the **Wait Days Derivation** system event depending on the wait period source which is specified in the delinquency process type

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- Calculates the trigger date for the delinquency event based on the trigger date calculation mode, usage basis, and wait period defined in the delinquency process type
- Sets the delinquency due date of the delinquency process to the latest bill due date

If the **Consider Work Days** option is selected in the respective delinquency process type, the system derives the work calendar of the division to which the account belongs. The system then checks whether the calculated trigger date falls on the working (i.e. business) day. If the calculated trigger date does not fall on the working (i.e. business) day, the system will accordingly add days to the calculated trigger date to ensure that it falls on the next working day.

If the calculated trigger date of a delinquency event is later than or equal to the batch business date, the status of the delinquency event is changed from **Pending Evaluation** to **Pending**. But, if the calculated trigger date of a delinquency event is earlier than the batch business date and if the **Skip Past Event** option is selected corresponding to the respective delinquency event type, the system sets the status of the delinquency event to **Skipped**. However, if the calculated trigger date of a delinquency event is earlier than the batch business date and if the **Skip Past Event** option is not selected corresponding to the respective delinquency event type, the system checks whether the **Move Past Dated Event to Future** option is selected corresponding to the respective delinquency event type.

Note: You can select the **Move Past Dated Event to Future** option only when the wait period is set to **Monthly Cyclic** in the respective delinquency process type.

If the **Move Past Dated Event to Future** option is selected corresponding to the respective delinquency event type, the system moves the trigger date by adding one month until the trigger date is later than or equal to the batch business date. But, if the **Move Past Dated Event to Future** option is not selected corresponding to the respective delinquency event type, the system makes no changes to the trigger date even if it is past dated. Finally, the system sets the status of the delinquency event to **Pending**.

Note:

If the trigger date of an event is moved to a future date, the trigger date of the subsequent events in the delinquency process is also moved accordingly. This is because the system is designed to trigger only one event at a time in a month.

Usually, this batch changes the status of the delinquency event from **Pending Evaluation** to **Pending**. But, if the wait period in the respective delinquency process type is set to **Monthly Cyclic** and if the **Move Past Dated Event to Future** option is selected corresponding to the respective delinquency event type, the **C1-ADJTGDT** algorithm attached to the **Post-Processing** system event of the **C1-DPEVL** batch moves the past dated trigger date to a future date and changes the status of the delinquency event to **Pending**.

If the **Preview Required** option is not selected corresponding to the delinquency event type in the respective delinquency process type, the system sets the preview status of the delinquency event to **Not Required**. However, if the **Preview Required** option is selected corresponding to the delinquency event type in the respective delinquency process type, the system does the following:

- Derives the preview days specified corresponding to the delinquency event type in the delinquency process type
- Calculates the preview date (i.e. Trigger Date – Preview Days) for the delinquency event
- Sets the preview status of the delinquency event to **Pending**

The **C1-DPEVL** batch is a multi-threaded batch. The multi-threading is based on delinquency event ID and chunks for multi-threading are created based on numerical distribution of delinquency event ID. For more information about the batch, see *Oracle Revenue Management and Billing Batch Guide*.

Delinquency Process Maintenance

Once the delinquency process is created in the **Initiated** status, the system enables you to view the details of the delinquency process. Two new screens named **Delinquency Process Search** and **Delinquency Process** are introduced in this release. The **Delinquency Process Search** screen enables you to search for a delinquency process either using the details of the delinquency process or using the details of the account, person, or membership for which the delinquency process is created.

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Note: The **Person ID** field while searching for a delinquency process is only applicable for the fully insured group business.

The **Delinquency Process** screen enables you to view the details of a delinquency process. It contains the following zones:

- **Delinquency Process Details** – Display the basic details of the delinquency process.
- **Additional Attributes** – Display the characteristics of the delinquency process.
- **Bills** – Lists the overdue bills of the account for which the delinquency process is created.
- **Events** – List all events that are included in the delinquency process.
- **Event Notifications** – Lists the notifications (i.e. To Do, customer contact), if any, created for the delinquency event.
- **Approval Details** – Lists the approval records that are created while performing manual actions at the delinquency process or delinquency event level.
- **Hold Details** – Lists the hold records that are created whenever you hold the delinquency process.
- **Log** – Lists the complete trail of actions performed on the delinquency process.

Manual Actions at the Delinquency Process Level

The **Delinquency Process** screen enables you to perform the following actions at the delinquency process level:

- **Edit** – Used when you want to add additional information for the delinquency process in the form of comments or characteristics.
- **Hold** – Used when you want to manually hold the delinquency process. The **Hold** button appears only when the delinquency process is in the **Initiated**, **Delinquency In Progress**, or **Pending Termination** status. While manually holding a delinquency process, you need to specify the following:
  - A hold end date which is later than the system date
  - The reason why you want to hold the delinquency process. Note that the list includes only those reasons which are defined for the **Initiate Hold** status of the **C1-DelinquencyProcess** business object.

  The hold start date is set to the system date when you manually hold the delinquency process. On saving the changes, the status of the delinquency process is changed to the value (for example, **Initiate Hold**) specified in the **Delinquency Process Initiate Hold Status** attribute of the delinquency process preference. The system then checks whether the approval is required for the **Hold** action in the respective delinquency process type.

  If the approval is not required while manually holding the delinquency process, the status of the delinquency process is immediately changed to the value (for example, **On Hold**) specified in the **Delinquency Process Hold Status** attribute of the delinquency process preference. A hold record is created for the delinquency process in the **Active** status. However, if the approval is required while manually holding the delinquency process, an approval record is created in the **Approval In Progress** status. A To Do is created using the approval To Do type to approve the manual hold and assigned to the users with the approval To Do role. In addition, the status of the delinquency process is changed to the value (for example, **Delinquency In Progress – Exception Raised**) specified in the **Delinquency Process Approval In Progress Status** attribute of the delinquency process preference. Note that the system continues to trigger the delinquency events on the trigger date even when the approval is in progress until the approver approves the manual hold.

  If the approver approves the manual hold, the status of the delinquency process is changed to the value (for example, **On Hold**) specified in the **Delinquency Process Hold Status** attribute of the delinquency process preference. In addition, the system does the following:

  - The hold start date is changed to the date when the approver approves the manual hold.
  - The status of the approval record is changed to **Approved**.
  - A hold record is created for the delinquency process in the **Active** status.

  However, if the approver rejects the manual hold, the status of the approval record is changed to **Rejected** and the status of the delinquency process is changed to its previous status (i.e. **Initiated**, **Delinquency In Progress**, or **Pending Termination**).

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- **Cancel** – Used when you want to manually cancel the delinquency process. The **Cancel** button appears only when the delinquency process is in the **Initiated**, **Delinquency In Progress**, or **On Hold** status. While manually canceling a delinquency process, you need to specify the cancel reason and comments, if any. You must specify a reason which is defined for the **Initiate Cancel** status of the **C1-DelinquencyProcess** business object in the **Status Reason** screen.

  On manually canceling a delinquency process, the status of the delinquency process is set to the value (for example, **Initiate Cancel**) specified in the **Delinquency Process Initiate Cancel Status** attribute of the delinquency process preference. The system then checks whether the approval is required for the **Cancel** action in the respective delinquency process type. If the approval is not required while manually canceling the delinquency process, the status of the delinquency process is changed to the value (for example, **Canceled**) specified in the **Delinquency Process Canceled Status** attribute of the delinquency process preference.

  However, if the approval is required while manually canceling the delinquency process, an approval record is created in the **Approval In Progress** status. A To Do is created using the approval To Do type to approve the manual cancellation and assigned to the users with the approval To Do role.

  In addition, the status of the delinquency process is changed to the value (for example, **Delinquency In Progress – Exception Raised**) specified in the **Delinquency Process Approval In Progress Status** attribute of the delinquency process preference. Note that the system continues to trigger the delinquency events on the trigger date even when the approval is in progress until the approver approves the manual cancellation of the delinquency process.

  If the approver approves the manual cancellation of the delinquency process, the status of the delinquency process is set to the value (for example, **Canceled**) specified in the **Delinquency Process Canceled Status** attribute of the delinquency process preference. In addition, the status of the approval record is changed to **Approved**. However, if the approver rejects the manual cancellation of the delinquency process, the status of the approval record is changed to **Rejected** and the status of the delinquency process is changed to its previous status (i.e. **Initiated**, **Delinquency In Progress**, or **On Hold**).
- **Release** – Used when you want to manually release the hold on the delinquency process. The **Release** button appears only when the delinquency process is in the **On Hold** status. While manually releasing the hold on the delinquency process, you are prompted to confirm the hold release. On confirming the hold release, the status of the delinquency process is changed to the value (for example, **Initiate Release**) specified in the **Delinquency Process Initiate Release Status** attribute of the delinquency process preference. The system then checks whether the approval is required for the **Release Hold** action in the respective delinquency process type. If the approval is not required while manually releasing the hold on the delinquency process, the status of the delinquency process is immediately changed to its previous status (i.e. **Initiated**, **Delinquency In Progress**, or **Pending Termination**). In addition, the hold end date is set to the date when you manually release the hold on the delinquency process. Finally, the status of hold record is changed to **Completed**.

  However, if the approval is required while manually releasing the hold on the delinquency process, an approval record is created in the **Approval In Progress** status. A To Do is created using the approval To Do type to approve the manual hold release and assigned to the users with the approval To Do role. In addition, the status of the delinquency process is changed to the value (for example, **Delinquency In Progress – Exception Raised**) specified in the **Delinquency Process Approval In Progress Status** attribute of the delinquency process preference. If the approver approves the hold release, the status of the delinquency process is changed to its previous status (i.e. **Initiated**, **Delinquency In Progress**, or **Pending Termination**). The hold end date is set to the date when the approver approves the hold release. In addition, the status of the approval record is changed to **Approved** and the status of hold record is changed to **Completed**. However, if the approver rejects the hold release, the status of the approval record is changed to **Rejected** and the status of the delinquency process is changed to its previous status (i.e. **On Hold**).
- **Request Reinstatement** – This button is not applicable for the delinquency processes which are created for the fully insured individual business.
- **Edit Hold** – On clicking the **Edit** icon corresponding to the hold record of the delinquency process, you can edit the hold end date and hold reason. Note that the **Edit** icon appears only when following conditions are met:
  - The delinquency process is in the **On Hold** status.
  - The delinquency process is kept on hold manually and not automatically.
  - The hold record is in the **Active** status.

  While editing the hold details, you can specify the following:

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- A hold end date which is later than the system date and which is later than the date which is the latest of the following:
  - Postpone credit review date
  - Latest schedule date specified in the payment agreement request
  - Latest schedule date specified among all the active promise to pay
- The reason why you want to hold the delinquency process. Note that the list includes only those reasons which are defined for the **Initiate Hold** status of the **C1-DelinquencyProcess** business object.

On saving the changes, the system checks whether the approval is required for the **Edit Hold** action in the respective delinquency process type. If the approval is not required while manually editing the hold details, the hold end date and hold reason of the delinquency process are updated immediately.

However, if the approval is required while manually editing the hold details, an approval record is created in the **Approval In Progress** status. A To Do is created using the approval To Do type to approve the changes and assigned to the users with the approval To Do role. The status of the delinquency process remains as **On Hold**. If the approver approves the changes, the hold end date and hold reason of the delinquency process are updated. In addition, the status of the approval record is changed to **Approved**. However, if the approver rejects the hold changes, the status of the approval record is changed to **Rejected** and the hold changes are not reflected in the delinquency process.

Note:

The system considers the delinquency process preference which is specified in the **Delinquency Process Field Mapping** option type of the **DELINPROC** feature configuration. For more information about the feature configuration, see Setting the DELINPROC Feature Configuration on page 4442.

If the required attributes are not defined in the delinquency process preference, erroneous results will occur.

The system considers the approval To Do type and approval To Do role specified in the respective delinquency process type. If the approval To Do role is not specified in the respective delinquency process type, the system considers the default To Do role associated with the approval To Do type.

Manual Actions at the Delinquency Event Level

You can also perform the following actions for each delinquency event of the delinquency process from the **Delinquency Process** screen:

- **Edit Trigger Date** – On clicking the **Edit Trigger Date** icon corresponding to a delinquency event, you can specify a new trigger date for the delinquency event. Note that the **Edit Trigger Date** icon appears only when the following conditions are met:
  - The delinquency process is in the **Initiated** or **Delinquency In Progress** status
  - The delinquency event trigger mode is set to **Manual** or **Automatic** in the respective delinquency process type
  - The delinquency event is in the **Pending** status

  Once you specify the new trigger date and save the changes, the system checks whether the approval is required for the **Edit Trigger Date** action in the respective delinquency process type. If the approval is not required while manually editing the trigger date, the trigger date of the delinquency event is updated immediately.

  However, if the approval is required while manually editing the trigger date, an approval record is created for the delinquency event in the **Approval In Progress** status. A To Do is created using the approval To Do type to approve the changes and assigned to the users with the approval To Do role. Note that the icons in the **Trigger Events** and **Skip Event** columns (if any) corresponding to the delinquency event are removed immediately, so that users should not be able to perform any other actions on the delinquency event. The status of the delinquency process remains as **Initiated** or **Delinquency In Progress**. Note that the system continues to trigger the delinquency events on the trigger date even when the approval is in progress. If a delinquency event is triggered before the approval is received for the delinquency event, the status of the approval record is changed to **Expired**.

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If the approver approves the changes, the trigger date of the delinquency event is updated. The icons in the **Trigger Events** and **Edit Trigger Date** columns (if any) corresponding to the delinquency event are displayed again. In addition, the status of the approval record is changed to **Approved**. However, if the approver rejects the changes, the status of the approval record is changed to **Rejected** and the trigger date of the delinquency event is not updated. However, the icons in the **Trigger Events** and **Edit Trigger Date** columns (if any) corresponding to the delinquency event are displayed again.

- **Skip Event** – On clicking the **Skip Event** icon corresponding to a delinquency event, the system checks whether the approval is required for the **Skip Event** action in the respective delinquency process type. Note that the **Skip Event** icon appears only when the following conditions are met:
  - The delinquency process is in the **Initiated** or **Delinquency In Progress** status
  - The delinquency event trigger mode is set to **Manual** or **Manual or Automatic** in the respective delinquency process type
  - The delinquency event is in the **Pending** status

  If the approval is not required while manually skipping the delinquency events, the status of the delinquency event is changed to **Skipped** immediately. In addition, the icons in the **Trigger Events** and **Edit Trigger Date** columns (if any) corresponding to the delinquency event are also removed. However, if the approval is required while manually skipping the delinquency events, an approval record is created for the delinquency event in the **Approval In Progress** status. A To Do is created using the approval To Do type to approve the changes and assigned to the users with the approval To Do role. Note that the icons in the **Trigger Events** and **Edit Trigger Date** columns (if any) corresponding to the delinquency event are removed immediately, so that users should not be able to perform any other actions on the delinquency event.

  The status of the delinquency process remains as **Initiated** or **Delinquency In Progress**. Note that the system continues to trigger the delinquency events on the trigger date even when the approval is in progress. If a delinquency event is triggered before the approval is received for the delinquency event, the status of the approval record is changed to **Expired**.

  If the approver approves the skip action, the status of the delinquency event is changed to **Skipped** immediately. In addition, the status of the approval record is changed to **Approved**. Note that the icons in the **Trigger Events** and **Edit Trigger Date** columns corresponding to the delinquency event are not displayed again. However, if the approver rejects the skip action, the status of the approval record is changed to **Rejected**. The status of the delinquency event remains as **Pending**. In addition, the icons in the **Trigger Events** and **Edit Trigger Date** columns (if any) corresponding to the delinquency event are displayed again.
- **Trigger Event** - On clicking the **Trigger Event** icon corresponding to a delinquency event, the system checks whether the approval is required for the **Trigger Event** action in the respective delinquency process type. Note that the **Trigger Event** icon appears only when the following conditions are met:
  - The delinquency process is in the **Initiated** or **Delinquency In Progress** status
  - The delinquency event trigger mode is set to **Manual** or **Manual or Automatic** in the respective delinquency process type
  - The delinquency event is in the **Pending** status

  If the approval is not required while manually triggering the delinquency events, the algorithms attached to the **Event Activation** system event of the respective delinquency event type are executed immediately in the specified order. The status of the delinquency event is changed to **Completed** when all algorithms attached to the **Event Activation** system event are successfully executed. In addition, the icons in the **Skip Event** and **Edit Trigger Date** columns (if any) corresponding to the delinquency event are also removed. However, if the approval is required while manually triggering the delinquency events, an approval record is created for the delinquency event in the **Approval In Progress** status. A To Do is created using the approval To Do type to approve the changes and assigned to the users with the approval To Do role. Note that the icons in the **Skip Event** and **Edit Trigger Date** columns (if any) corresponding to the delinquency event are removed immediately, so that users should not be able to perform any other actions on the delinquency event.

  The status of the delinquency process remains as **Initiated** or **Delinquency In Progress**. Note that the system continues to trigger the delinquency events on the trigger date even when the approval is in progress. If a delinquency event is triggered before the approval is received for the delinquency event, the status of the approval record is

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changed to **Expired**. If the approver approves the manual trigger action, the algorithms attached to the **Event Activation** system event of the respective delinquency event type are executed immediately in the specified order.

The status of the delinquency event is changed to **Completed** when all algorithms attached to the **Event Activation** system event are successfully executed. In addition, the status of the approval record is changed to **Approved**. Note that the icons in the **Skip Event** and **Edit Trigger Date** columns corresponding to the delinquency event are not displayed again. However, if the approver rejects the manual trigger action, the status of the approval record is changed to **Rejected**. The status of the delinquency event remains as **Pending**. In addition, the icons in the **Skip Event** and **Edit Trigger Date** columns (if any) corresponding to the delinquency event are displayed again.

Note that the algorithms attached to the **Monitor Completed Event** system event of the respective delinquency event type are not executed in the online mode when the status of the delinquency event is changed to **Completed**. These algorithms are executed when you invoke the **C1-DPMON** batch.

Whenever you manually execute the subsequent events (non-first event) in the delinquency process, the system first checks whether the algorithms attached to the **Monitor Completed Event** system event of the previous delinquency event is successfully executed or not. If an algorithm attached to the **Monitor Completed Event** system event of the previous delinquency event is not executed successfully, the system displays a warning message that indicates the previous event's monitoring algorithms are not executed successfully and confirms whether you want to continue in such scenario. If you click **Yes**, the system ignores the previous event's monitoring algorithm and executes the algorithms attached to the **Event Activation** system event of the current delinquency event (which is triggered). However, if you click **No**, the system does not execute the algorithms attached to the **Event Activation** system event of the current delinquency event. Note that if there are no algorithms attached to the **Monitor Completed Event** system event of the previous delinquency event, the system will directly execute the algorithms attached to the **Event Activation** system event of the current delinquency event.

Note: The system considers the approval To Do type and approval To Do role specified in the respective delinquency process type. If the approval To Do role is not specified in the respective delinquency process type, the system considers the default To Do role associated with the approval To Do type.

Delinquency Process Approval

At a time, the system creates an approval record for only one manual action at the delinquency process or delinquency event level. Therefore, if an approval record exists for a delinquency process, the system does not allow you to perform other manual action on the delinquency process until the respective approval record's status changes to **Approved** or **Rejected**. Similarly, if an approval record exists for a delinquency event, the system does not allow you to perform other manual action on the delinquency event until the respective approval record's status changes to **Approved** or **Rejected**. However, you can still perform a manual action for other delinquency events of the delinquency process.

The system enables you to withdraw an approval request for any manual action at the delinquency process or delinquency event level. Only the users of the user group to which the submitter belongs can withdraw the approval request which is in the **Approval In Progress** status. On confirming the withdrawal of an approval request, the status of the approval record is changed to **Withdrawn**.

The system enables you to perform the following actions for an approval record from the **Delinquency Process** screen:

- **Add Comments** – Used when you want to add additional information about the approval record. Both the submitter and approver can add the comments.
- **View Details** – Used to view the details of the manual action which is performed by the submitter. If the approval record is created while manually editing the trigger date of a delinquency event, the system enables you to view the old and new trigger date of the delinquency event. If the approval record is created while manually holding a delinquency process, the system enables you to view the hold end date and hold reason. However, if the approval record is created while manually editing the hold details of the delinquency process, the system enables you to view the old and new hold end dates and hold reasons. Both the submitter and approver can view the details of an approval record.
- **Approve** – Used when you want to approve the manual action performed at the delinquency process or delinquency event level. Only users with the approver To Do role can approve the approval request.

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- **Reject** – Used when you want to reject the manual action performed at the delinquency process or delinquency event level. Only users with the approver To Do role can reject the approval request.
- **Withdraw** – Used when you want to withdraw the approval request. Only the users of the user group to which the submitter belongs can withdraw the approval request which is in the **Approval In Progress** status.

Note:

If the delinquency process is in the **On Hold** status, you cannot approve or reject any other manual actions except the **Release Hold** and **Edit Hold** actions. All other manual actions can be reviewed and accordingly approved or rejected by the approver only after the hold on the delinquency process is released.

When a delinquency process is canceled, the status of the pending approval records is changed to **Expired**.

Canceling a Delinquency Process

Oracle Revenue Management and Billing enables you to cancel a delinquency process of a person or an account manually or automatically. You can manually cancel a delinquency process whenever required. In addition, the system automatically cancels a delinquency process when either of the following condition is met:

- Payments or adjustments are made against the overdue bills, for which the delinquency process is created, and as a result the unpaid balance of the overdue bills is within the tolerance limit
- Collection class of the account, for which the delinquency process is created, is changed
- Voluntary termination is received for an individual membership (which is billed to the delinquent account) with a termination date that is earlier than or equal to the calculated termination date
- Voluntary cancellation is received for an individual membership (which is billed to the delinquent account)
- Membership benefit charges is billed in the earliest unpaid coverage period and now the benefit charge is no longer applicable from the earliest unpaid coverage period.
- Membership benefit charges was not billed in the earliest unpaid coverage period, but the benefit charge is now applicable from the earliest unpaid coverage period.

To enable the automatic cancellation process for the delinquency processes which are created using a particular delinquency process type, you need to attach the following algorithms to the **Cancel Criteria** system event of the respective delinquency process type:

- C1-CANDELPRC on page 4150 (used for all the lines of business)
- C1-CANDPAPTC on page 4152 (used for the fully insured individual business)

The above algorithms are invoked when you execute the **C1-DPMON** batch.

The **Cancel** button in the **Delinquency Process** screen enables you to manually cancel a delinquency process. It appears only when the delinquency process is in the **Initiated**, **Delinquency In Progress**, or **On Hold** status. On manually canceling a delinquency process, the status of the delinquency process is changed to the value (for example, **Initial Cancel**) specified in the **Delinquency Process Initiate Cancel Status** attribute of the delinquency process preference. For more information about the manual cancellation process, see Manual Actions at the Delinquency Process Level on page 4165.

Once a delinquency process is manually or automatically canceled, the status of the delinquency process is changed to the value (for example, **Canceled**) specified in the **Delinquency Process Canceled Status** attribute of the delinquency process preference. Note that a delinquency process in the **Pending Termination** status cannot be canceled manually but only automatically through the **C1-DPMON** batch.

Note: The system considers the delinquency process preference which is specified in the **Delinquency Process Field Mapping** option type of the **DELINPROC** feature configuration. For more information about the feature configuration, see Setting the DELINPROC Feature Configuration on page 4442.

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Once the status of the delinquency process is changed to **Canceled**, the system then executes the **C1-DPCAN** algorithm attached to the **Canceled** status in the lifecycle of the **C1-DelinquencyProcess** business object. The **C1-DPCAN** algorithm does the following:

- Creates a To Do notification with the cancel reason
- If there is any hold record for the delinquency process in the **Active** status, this algorithm changes the status of the hold record to **Complete**.
- If there is any pending record for approval at the delinquency event or process level, this algorithm changes the status of pending approval records to **Expired**.

This algorithm contains the following parameters:

- **To Do Type** – Used to indicate the To Do type using which you want to create a To Do when the delinquency process is canceled. This parameter is required.
- **To Do Role** – Used to indicate that users with the specified To Do role must receive the To Do notification. This parameter is optional. If you do not specify this parameter, this algorithm considers the default To Do role associated with the To Do type.
- **To Do Entry required for Individual Delinquency (Valid Values - Y/N)** – Used to indicate whether the To Do notification should be created on canceling a delinquency process for the fully insured individual business. The valid values are **Y** and **N**. Note that this parameter is not applicable for the fully insured group business. This algorithm will create a To Do notification on canceling a delinquency process for the fully insured group business irrespective of whether this parameter is set to **Y** or **N**.

Resuming a Delinquency Process

Oracle Revenue Management and Billing enables you to resume a delinquency process which was canceled due to a payment or adjustment made against the overdue bill for which the delinquency process was created. The system enables you to resume a delinquency process only when the respective payment or adjustment is canceled due to non-sufficient funds. The insurance company may come across the following scenarios:

- Scenarios wherein the delinquency process is canceled in between events when the status of the delinquency process is **Initiated**, **Delinquency In Progress**, or **On Hold**
- Scenarios wherein the delinquency process is canceled after the delinquency process moves to the **Customer Reinstated** status due the individual membership reinstatement

The system enables you to handle both these scenarios when a payment or adjustment made against a bill is canceled.

Resuming a Delinquency Process on Payment Cancellation

To automatically resume a delinquency process when a payment made against the respective overdue bill is canceled, you need to attach the following algorithms to the **Payment Cancellation** system event of the required customer classes:

- **C1-CDPPAYCAN** - This algorithm is invoked when a payment is canceled. It checks whether the **Delinquency Process (C1-DELPO)** characteristic is defined on the payment. If the **C1-DELPO** characteristic is not defined on the payment, the system creates a customer contact for the main customer of the account for which the payment was made. In addition, the system stamps the payment ID as a characteristic using the given characteristic type on the customer contact and the customer contact ID as a characteristic using the given characteristic type on the payment.

  However, if the **C1-DELPO** characteristic is defined on the payment, the system derives the delinquency process ID from characteristic value. It then validates whether the delinquency process exist with the given ID in the system. Note that if the delinquency process does not exist, no further action takes place on the payment cancellation. However, if the delinquency process ID is successfully validated, the system checks the following:

  - The status of the delinquency process is set to the value (for example, **Canceled**) specified in the **Delinquency Process Canceled Status** attribute of the delinquency process preference.
  - The related delinquency process does not exist for the delinquency process.

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Note: The system considers the delinquency process preference which is specified in the **Delinquency Process Field Mapping** option type of the **DELINPROC** feature configuration. For more information about the feature configuration, see Setting the DELINPROC Feature Configuration on page 4442.

If either or both the conditions are not satisfied, no further action takes place on the payment cancellation. However, if both the conditions are satisfied, the system invokes the **C1-CANDELPRC** algorithm attached to the **Cancel Criteria** system event of the respective delinquency process type. If the cancel criteria is met, the delinquency process remains in the existing status and no further action takes place on the payment cancellation. However, if the cancel criteria is not met, the status of the delinquency process is set to the status prior to cancellation (i.e. **Initiated**, **Delinquency In Progress**, or **On Hold**). If the status of the delinquency process before cancellation was **On Hold**, then the status of the hold record is changed to **Active**. The system also creates a customer contact for the main customer of the account for which the payment was made. In addition, the system does the following:

- Adds a log entry for the customer contact in the delinquency process
- Stamps the customer contact ID as a characteristic using the given characteristic type on the payment
- Stamps the payment ID as a characteristic using the given characteristic type on the customer contact
- Stamps the delinquency process ID using the **C1-DELPO** characteristic type on the customer contact

This algorithm derives the preferred contact method for the customer contact. While deriving the preferred contact method, the algorithm first fetches the main customer's bill route type on the account and then fetches the bill routing method of the bill route type. Once the bill routing method is derived, the system considers the preference which is specified in the **Routing Method – Contact Method Mapping** option type of the **DELINPROC** feature configuration. For more information about the feature configuration, see Setting the DELINPROC Feature Configuration on page 4442. It then checks whether any preferred contact method is mapped to the bill routing method in the preference.

If the preferred contact method is mapped to the bill routing method in the preference, the system stamps it on the customer contact. However, if the preferred contact method is not mapped to the bill routing method in the preference, the system considers the default contact method as the preferred contact method and stamps it on the customer contact.

This algorithm contains the following parameters:

- **Customer Contact Type** - Used to indicate the customer contact type using which you want to create the customer contact.
- **Customer Contact Class** - Used to indicate the customer contact class to which the customer contact type belongs.
- **Default Contact Method** - Used to indicate the contact method that you want to use when the preferred contact method cannot be derived for the routing method from the preference.
- **Customer Contact Characteristic Type** - Used to indicate the characteristic type using which you want to store the customer contact ID on the payment. Here, you must specify a characteristic type where the characteristic entity is set to **Payment**.
- **Payment Characteristic For Customer Contact** - Used to indicate the characteristic type using which you want to store the payment ID on the customer contact. Here, you must specify a characteristic type where the characteristic entity is set to **Customer Contact**.

All the above parameters are mandatory.

- **C1-RODPDUEPX** - This algorithm is invoked when a payment is canceled. It derives the reason why the payment was canceled and validates whether it is listed as a value in the **Excluded Payment Cancel Reason List** parameter. If the payment cancel reason is listed in the **Excluded Payment Cancel Reason List** parameter, no further action takes place on the payment cancellation. However, if the payment cancel reason is not listed in the **Excluded Payment Cancel Reason List** parameter, the system checks whether the **Delinquency Process (C1-DELPO)** characteristic is defined on the payment. If the **C1-DELPO** characteristic is not defined on the payment, no further action takes place on the payment cancellation.

  However, if the **C1-DELPO** characteristic is defined on the payment, the system derives the delinquency process ID from characteristic value. It then validates whether the delinquency process exist with the given ID in the system. If the delinquency process does not exist, no further action takes place on the payment cancellation. However, if the

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delinquency process ID is successfully validated, the system checks whether the status of the delinquency process is set to the value (for example, **Customer Reinstated**) specified in the **Delinquency Process Customer Reinstated Status** attribute of the delinquency process preference. If so, the system checks the value of the **Delinquency Process Resume Switch (Valid Values – Y,N)** parameter. If the **Delinquency Process Resume Switch (Valid Values – Y,N)** parameter is set to **Y**, the system does the following:

- Sets the status of the delinquency process to the value (for example, **Reinstatement Payment/Adjustment Canceled**) specified in the **Delinquency Reinstatement Payment/Adjustment Canceled Status** attribute of the delinquency process preference

However, if the **Delinquency Process Resume Switch (Valid Values – Y,N)** parameter is set to **N**, the system does the following:

- If a delinquency process created using the given delinquency process type already exists for the account, the system adds the overdue bill for which the payment is canceled in the existing delinquency process. In addition, a log entry is created for the overdue bill which is added in the existing delinquency process. Note that the system considers an existing delinquency process which is in the status that is listed in the **Delinquency Process Status For Existing Delinquency Process** parameter of the **C1-DLNQMNRL** algorithm attached to the delinquency control of the person's or account's collection class, respectively.
- If a delinquency process does not exist for the account, the system creates a new delinquency process using the given delinquency process type. It adds the overdue bill for which the payment is canceled in the new delinquency process. Also, if there are any other overdue bills of the account that do not meet the tolerance limit are also added in the delinquency process. The status of the delinquency process is set to the value (for example, **Initiated**) specified in the **Delinquency Process Initiated Status** attribute of the delinquency process preference. In addition, a log entry is created for each overdue bill which is added in the delinquency process.

Note: The system considers the delinquency process preference which is specified in the **Delinquency Process Field Mapping** option type of the **DELINPROC** feature configuration. For more information about the feature configuration, see Setting the DELINPROC Feature Configuration on page 4442.

This algorithm contains the following parameters:

- **Excluded Payment Cancel Reason List** – Used to specify a list of comma-separated payment cancel reasons. The system will then skip the payments which are canceled using the given payment cancel reason and will not take any actions on the payment cancellation. You can specify maximum five comma-separated values for this parameter. Here, you must specify a payment cancel reason which is already defined in the system.
- **Delinquency Process Resume Switch (Valid Values – Y,N)** – Used to indicate whether the original delinquency process which was canceled due to the payment should be resumed when the payment is canceled. The valid values are – **Y** and **N**. This parameter is mandatory.
- **Delinquency Process Type** – Used to indicate the delinquency process type using which a new process delinquency process should be created for the account when the payment is canceled. It is also used to check whether any existing delinquency process created using the given delinquency process type already exists in the system. Here, you must specify a delinquency process type which is already defined in the system. This parameter is required only when the **Delinquency Process Resume Switch (Valid Values – Y,N)** parameter is set to **N**.

Resuming a Delinquency Process on Adjustment Cancellation

To automatically resume a delinquency process when an adjustment made against the respective overdue bill is canceled, you need to attach the following algorithms to the **Adjustment Cancellation** system event of the required adjustment types:

- **C1-DPADJCAN** - This algorithm is invoked when an adjustment is canceled. It checks whether the **Delinquency Process (C1-DELPO)** characteristic is defined on the adjustment. If the **C1-DELPO** characteristic is not defined on the adjustment, the system creates a customer contact for the main customer of the account for which the adjustment was created. In addition, the system stamps the adjustment ID as a characteristic using the given characteristic type on the customer contact and the customer contact ID as a characteristic using the given characteristic type on the adjustment.

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However, if the **C1-DELPO** characteristic is defined on the adjustment, the system derives the delinquency process ID from characteristic value. It then validates whether the delinquency process exist with the given ID in the system. Note that if the delinquency process does not exist, no further action takes place on the adjustment cancellation. However, if the delinquency process ID is successfully validated, the system checks the following:

- The status of the delinquency process is set to the value (for example, **Canceled**) specified in the **Delinquency Process Canceled Status** attribute of the delinquency process preference.
- The related delinquency process does not exist for the delinquency process.

Note: The system considers the delinquency process preference which is specified in the **Delinquency Process Field Mapping** option type of the **DELINPROC** feature configuration. For more information about the feature configuration, see Setting the DELINPROC Feature Configuration on page 4442.

If either or both the conditions are not satisfied, no further action takes place on the adjustment cancellation. However, if both the conditions are satisfied, the system invokes the **C1-CANDELPRC** algorithm attached to the **Cancel Criteria** system event of the respective delinquency process type. If the cancel criteria is met, the delinquency process remains in the existing status and no further action takes place on the adjustment cancellation. However, if the cancel criteria is not met, the status of the delinquency process is set to the status prior to cancellation (i.e. **Initiated**, **Delinquency In Progress**, or **On Hold**). If the status of the delinquency process before cancellation was **On Hold**, then the status of the hold record is changed to **Active**. The system also creates a customer contact for the main customer of the account for which the adjustment was created. In addition, the system does the following:

- Adds a log entry for the customer contact in the delinquency process
- Stamps the customer contact ID as a characteristic using the given characteristic type on the adjustment
- Stamps the adjustment ID as a characteristic using the given characteristic type on the customer contact
- Stamps the delinquency process ID using the **C1-DELPO** characteristic type on the customer contact

This algorithm derives the preferred contact method for the customer contact. While deriving the preferred contact method, the algorithm first fetches the main customer's bill route type on the account and then fetches the bill routing method of the bill route type. Once the bill routing method is derived, the system considers the preference which is specified in the **Routing Method – Contact Method Mapping** option type of the **DELINPROC** feature configuration. For more information about the feature configuration, see Setting the DELINPROC Feature Configuration on page 4442. It then checks whether any preferred contact method is mapped to the bill routing method in the preference.

If the preferred contact method is mapped to the bill routing method in the preference, the system stamps it on the customer contact. However, if the preferred contact method is not mapped to the bill routing method in the preference, the system considers the default contact method as the preferred contact method and stamps it on the customer contact.

This algorithm contains the following parameters:

- **Customer Contact Type** - Used to indicate the customer contact type using which you want to create the customer contact.
- **Customer Contact Class** - Used to indicate the customer contact class to which the customer contact type belongs.
- **Default Contact Method** - Used to indicate the contact method that you want to use when the preferred contact method cannot be derived for the routing method from the preference.
- **Customer Contact Characteristic Type** - Used to indicate the characteristic type using which you want to store the customer contact ID on the adjustment. Here, you must specify a characteristic type where the characteristic entity is set to **Adjustment**.
- **Adjustment Characteristic For Customer Contact** - Used to indicate the characteristic type using which you want to store the adjustment ID on the customer contact. Here, you must specify a characteristic type where the characteristic entity is set to **Customer Contact**.

All the above parameters are mandatory.

- **C1-RODPONADX** - This algorithm is invoked when an adjustment is canceled. It derives the reason why the adjustment was canceled and validates whether it is listed as a value in the **Excluded Adjustment Cancel Reason**

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List parameter. If the adjustment cancel reason is listed in the **Excluded Adjustment Cancel Reason List** parameter, no further action takes place on the adjustment cancellation. However, if the adjustment cancel reason is not listed in the **Excluded Adjustment Cancel Reason List** parameter, the system checks whether the **Delinquency Process (C1-DELPO)** characteristic is defined on the adjustment. If the **C1-DELPO** characteristic is not defined on the adjustment, no further action takes place on the adjustment cancellation.

However, if the **C1-DELPO** characteristic is defined on the adjustment, the system derives the delinquency process ID from characteristic value. It then validates whether the delinquency process exist with the given ID in the system. If the delinquency process does not exist, no further action takes place on the adjustment cancellation. However, if the delinquency process ID is successfully validated, the system checks whether the status of the delinquency process is set to the value (for example, **Customer Reinstated**) specified in the **Delinquency Process Customer Reinstated Status** attribute of the delinquency process preference. If so, the system checks the value of the **Delinquency Process Resume Switch** parameter. If the **Delinquency Process Resume Switch** parameter is set to **Y**, the system does the following:

- Sets the status of the delinquency process to the value (for example, **Reinstatement Payment/Adjustment Canceled**) specified in the **Delinquency Reinstatement Payment/Adjustment Canceled Status** attribute of the delinquency process preference

However, if the **Delinquency Process Resume Switch** parameter is set to **N**, the system does the following:

- If a delinquency process created using the given delinquency process type already exists for the account, the system adds the overdue bill for which the adjustment is canceled in the existing delinquency process. In addition, a log entry is created for the overdue bill which is added in the existing delinquency process. Note that the system considers an existing delinquency process which is in the status that is listed in the **Delinquency Process Status For Existing Delinquency Process** parameter of the **C1-DLNQMNRL** algorithm attached to the delinquency control of the person's or account's collection class.
- If a delinquency process does not exist for the account, the system creates a new delinquency process using the given delinquency process type. It adds the overdue bill for which the adjustment is canceled in the new delinquency process. Also, if there are any other overdue bills of the account that do not meet the tolerance limit are also added in the delinquency process. The status of the delinquency process is set to the value (for example, **Initiated**) specified in the **Delinquency Process Initiated Status** attribute of the delinquency process preference. In addition, a log entry is created for each overdue bill which is added in the delinquency process.

Note: The system considers the delinquency process preference which is specified in the **Delinquency Process Field Mapping** option type of the **DELINPROC** feature configuration. For more information about the feature configuration, see Setting the DELINPROC Feature Configuration on page 4442.

This algorithm contains the following parameters:

- **Excluded Adjustment Cancel Reason List** – Used to specify a list of comma-separated adjustment cancel reasons. The system will then skip the adjustments which are canceled using the given adjustment cancel reason and will not take any actions on the adjustment cancellation. You can specify maximum five comma-separated values for this parameter. Here, you must specify an adjustment cancel reason which is already defined in the system.
- **Delinquency Process Resume Switch** – Used to indicate whether the original delinquency process which was canceled due to the adjustment should be resumed when the adjustment is canceled. The valid values are – **Y** and **N**. This parameter is mandatory.
- **Delinquency Process Type** – Used to indicate the delinquency process type using which a new process delinquency process should be created for the account when the adjustment is canceled. It is also used to check whether any existing delinquency process created using the given delinquency process type already exists in the system. Here, you must specify a delinquency process type which is already defined in the system. This parameter is required only when the **Delinquency Process Resume Switch** parameter is set to **N**.

Recalculating Trigger Dates for Pending Events

Whenever a delinquency process moves from the **Canceled** status to **Initiated**, **Delinquency In Progress**, or **On Hold** on the payment or adjustment cancellation, the system executes the **C1-RECALCTG** algorithm attached to the

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Canceled status of the **C1-DelinquencyProcess** business object. This algorithm recalculates the trigger date for the delinquency events which are in the **Pending** status. It derives the difference between the delinquency process resume date and delinquency process cancellation date. These extra days are then added to the existing trigger date of the pending delinquency events and thereby the new trigger dates are calculated for the remaining events. If the **Consider Work Days** option is selected in the respective delinquency process type, the system derives the work calendar of the division to which the account belongs. The system then checks whether the new trigger date falls on the working (i.e. business) day. If the new trigger date does not fall on the working (i.e. business) day, the system will accordingly add days to the new trigger date to ensure that it falls on the next working day.

Membership Termination Outbound Message

The **C1-MemberTermRequest** business object is newly introduced in this release. It enables you to create a termination outbound message for an individual membership. Note that this business object is only applicable for the fully insured individual business.

To create the termination outbound messages for individual memberships through the **Delinquency Management** feature, you need to do the following:

- Create an external system to which you want to send the outbound messages. Note that the implementation team needs to design how the outbound message should be sent to the external system based on the customer requirements (i.e. through a batch control or a real-time service). Also, any response from the external system on receiving the outbound message should be captured in ORMB.
- Add the external system in the **C1-SourceSystemLookup** extendable lookup
- Create an outbound message type using which you want to create a termination outbound message for an individual membership. Here, you must specify the following:
  - The **C1-MemberTermRequest** business object using which you want to create the termination outbound messages for the individual memberships.
  - An external system to which you want to send the termination outbound messages that are created using the outbound message type.
- Create a delinquency process type using which you want to create a delinquency process to initiate termination request through an outbound message. For more information on how to design a delinquency process type to initiate termination request for an individual membership, see Individual Membership Termination Delinquency Process on page 4079.

Once the status reason of the individual memberships is set to the status reason which is specified in the **Membership Termination Reason for Delinquency** attribute of the delinquency process preference, you need to execute the **C1-MTOMT** batch to generate the termination outbound messages for the individual memberships. For more information about the batch, see Outbound Message Generation for Delinquency Management on page 4189.

Note: The system considers the delinquency process preference which is specified in the **Delinquency Process Field Mapping** option type of the **DELINPROC** feature configuration. For more information about the feature configuration, see Setting the DELINPROC Feature Configuration on page 4442.

For more information on...	See...
Membership Termination Outbound Message Schema	Membership Termination Outbound Message Schema on page 4177
Membership Termination Outbound Message XML Format	Membership Termination Outbound Message XML Format on page 4177
Sample Membership Termination Outbound Message	Sample Membership Termination Outbound Message on page 4181

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Membership Termination Outbound Message Schema

The following code snippet illustrates how the tags are nested in the membership termination outbound message schema:

```
<schema>
    <xmlRawResponse></xmlRawResponse>
    <xmlResponse></xmlResponse>
    <outboundMessageId></outboundMessageId>
    <notificationExternalId></notificationExternalId>
    <type></type>
    <processingMethod></processingMethod>
    <status></status>
    <extract></extract>
    <batchControl></batchControl>
    <batchNumber></batchNumber>
    <creationDateTime></creationDateTime>
    <messageCategory></messageCategory>
    <messageNumber></messageNumber>
    <processSignature></processSignature>
    <version></version>
    <xmlSource>
        <healthPlanCode></healthPlanCode>
        <externalMembershipId></externalMembershipId>
        <membershipId></membershipId>
        <delinquencyProcessId></delinquencyProcessId>
        <mainSubscriberPersonId></mainSubscriberPersonId>
        <mainSubscriberPersonIdentifierType></mainSubscriberPersonIdentifierType>
        <mainSubscriberPersonIdentifier></mainSubscriberPersonIdentifier>
        <mainSubscriberName></mainSubscriberName>
        <mainSubscriberRelationshipType></mainSubscriberRelationshipType>
        <startDate></startDate>
        <endDate></endDate>
        <paidThroughDate></paidThroughDate>
        <terminateDate></terminateDate>
        <terminateReason></terminateReason>
        <terminateReasonDescription></terminateReasonDescription>
        <billedAmount></billedAmount>
        <paidAmount></paidAmount>
    </xmlSource>
    <errorDetails></errorDetails>
    <ilmDate></ilmDate>
    <isEligibleForArchiving></isEligibleForArchiving>
</schema>
```

Membership Termination Outbound Message XML Format

Note:

We recommend you to refer the membership termination outbound message schema in parallel while understanding the below mentioned tags. This will help you to understand how the tags are nested in the schema.

At present, the membership termination outbound message is not delivered to the external system. The mechanism to deliver the membership termination outbound message is handled by the implementation team.

Tag Name	Tag Description	Mandatory (Yes or No)
schema	Used to specify the tags of a membership termination outbound message.	Yes
xmlRaw	Displays the unchanged information from an external source system when:	Not Applicable

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Tag Name	Tag Description	Mandatory (Yes or No)
Response	• A response XSL file is defined on the external system. • An outbound message type is associated with the outbound message. **Note:** At present, this tag does not contain any information.	
xmlResponse	Displays the information from an external source system which is invoked by the real-time message. **Note:** At present, this tag does not contain any information.	Not Applicable
outbound MessageId	Used to specify the outbound message ID.	Not Applicable
notification ExternalId	Used to specify the external source system ID.	Not Applicable
type	Used to specify the outbound message type using which you want to create the membership termination outbound message. **Note:** You must specify an outbound message type which is already defined in the system.	Not Applicable
processingMethod	Used to specify the method implemented in processing the membership termination outbound message. The valid value is: • **Batch**	Not Applicable
status	Indicates the status of the outbound message.	Not Applicable
extract	Indicates the action for processing the records in the batch. The valid values are: • **Can be Extracted** - Used when the records are created with a processing method of a batch. • **Not to be Extracted** - Used when the processing should be held for some reason.	Not Applicable
batchControl	Used to indicate the batch control for the membership termination outbound message.	Not Applicable
batchNumber	Used to specify the batch number.	Not Applicable
creation DateTime	Used to specify the date and time when the membership termination outbound message is processed.	Not Applicable
messageCategory	Used to specify the category to which the error message belongs.	Not Applicable
messageNumber	Used to specify the error code.	Not Applicable
processSignature	Used to specify the process signature.	Not Applicable
version	Used to specify the version.	Not Applicable

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Tag Name	Tag Description	Mandatory (Yes or No)
xmlSource	Used to specify the tag information for the membership termination outbound message.	Yes
delinquency ProcessId	Used to specify the delinquency process ID.	Yes
health PlanCode	Used to specify the unique identifier for the health plan.	Yes
external MembershipId	Used to specify the external membership ID. **Note:** Here, you need to specify a membership ID which is maintained in the external source system.	No
membershipId	Used to specify the membership ID.	Yes
mainSubscriber PersonId	Used to specify the person ID who is the main subscriber of the membership.	Yes (Conditional) **Note:** This data is required while defining or editing the respective information.
mainSubscriber PersonIdentifier Type	Used to specify the primary person identifier of the main subscriber of the membership.	Yes (Conditional) **Note:** This data is required while defining or editing the respective information.
mainSubscriber PersonIdentifier	Used to specify the value of the main subscriber person identifier type.	Yes (Conditional) **Note:** This data is required while defining or editing the respective information.
main SubscriberName	Used to specify the name of the main subscriber.	Yes (Conditional) **Note:** This data is required while defining or editing the respective information.
mainSubscriber RelationshipType	Used to specify the member person relationship type of the main subscriber of the membership.	Yes (Conditional) **Note:** This data is required while defining or editing the respective information.
startDate	Used to indicate the date from when the membership is effective.	Yes

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Tag Name	Tag Description	Mandatory (Yes or No)
	Note: The startDate cannot be later than the endDate.	
endDate	Used to indicate the date till when the membership is effective. **Note:** The endDate cannot be later than the startDate.	No
paidThrough Date	Used to indicate the paid through date of the account on which the membership is billed.	Yes
terminateDate	Used to indicate the membership termination date.	Yes (Conditional) **Note:** This data is required while defining or editing the respective information.
terminateReason	Used to specify the reason for membership termination.	Yes (Conditional) **Note:** This data is required while defining or editing the respective information.
terminate Reason Description	Used to specify additional information on membership termination.	No
billedAmount	Used to specify the sum of all original amounts of the bills involved in the delinquency process.	Yes
paidAmount	Used to specify the sum of all unpaid amounts of the bills involved in the delinquency process.	Yes
errorDetails	Displays the error information. **Note:** At present, this tag does not contain any information.	No
ilmDate	Displays the ilm date. **Note:** At present, this tag does not contain any information.	No
isEligibleForArchiving	Displays the ilm archiving switch. The valid values are: • **Y** • **N** **Note:** At present, this tag does not contain any information.	No

Related Topics

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For more information on...	See...
Membership Termination Outbound Message Schema	Membership Termination Outbound Message Schema on page 4177
Sample Membership Termination Outbound Message	Sample Membership Termination Outbound Message on page 4181

Sample Membership Termination Outbound Message

Using the below example, you can do the following:

- Initiate an outbound message to terminate an individual membership when the main subscriber is delinquent.

Person Name	Main Subscriber	Health Plan Code	Billed Amount	Paid Through Date	Amount Paid
JOE, LATHAM	Yes	APTC_BENEFIT	5000.00	31-10-2023	0.00

```
<schema>
    <xmlRawResponse></xmlRawResponse>
    <xmlResponse></xmlResponse>
    <outboundMessageId></outboundMessageId>
    <notificationExternalId></notificationExternalId>
    <type></type>
    <processingMethod></processingMethod>
    <status></status>
    <extract></extract>
    <batchControl></batchControl>
    <batchNumber></batchNumber>
    <creationDateTime></creationDateTime>
    <messageCategory></messageCategory>
    <messageNumber></messageNumber>
    <processSignature></processSignature>
    <version></version>
    <xmlSource>
        <healthPlanCode>APTC_BENEFIT</healthPlanCode>
        <externalMembershipId>JOE_LAT_1995</externalMembershipId>
        <membershipId>756692964026275</membershipId>
        <delinquencyProcessId>228385060384</delinquencyProcessId>
        <mainSubscriberPersonId>2350627566</mainSubscriberPersonId>
        <mainSubscriberPersonIdentifierType>WEB</mainSubscriberPersonIdentifierType>
        <mainSubscriberPersonIdentifier>JOE</mainSubscriberPersonIdentifier>
        <mainSubscriberName>JOE,LATHAM</mainSubscriberName>
        <mainSubscriberRelationshipType>OWNER</mainSubscriberRelationshipType>
        <startDate>2023-01-01</startDate>
        <endDate>2023-12-31</endDate>
        <paidThroughDate></paidThroughDate>
        <terminateDate>2023-10-31</terminateDate>
        <terminateReason>INDV_MEM_TERM</terminateReason>
        <terminateReasonDescription>
        Membership Awaiting Termination
        </terminateReasonDescription>
        <billedAmount>5000.00</billedAmount>
        <paidAmount>0.00</paidAmount>
    </xmlSource>
    <errorDetails></errorDetails>
    <ilmDate></ilmDate>
    <isEligibleForArchiving></isEligibleForArchiving>
</schema>
```

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Note: We have given the above sample to illustrate how the tags should be nested while sending an membership termination outbound message to the external system. However, you should not seamlessly use this sample in your environment because the required pre-requisite data may not be available in your environment. In such case, the system will give erroneous results.

Membership Cancellation Outbound Message

The **C1-MemberCancRequest** business object is newly introduced in this release. It enables you to create a cancellation outbound message for an individual membership. Note that this business object is only applicable for the fully insured individual business.

To create the cancellation outbound messages for individual memberships through the **Delinquency Management** feature, you need to do the following:

- Create an external system to which you want to send the outbound messages. Note that the implementation team needs to design how the outbound message should be sent to the external system based on the customer requirements (i.e. through a batch control or a real-time service). Also, any response from the external system on receiving the outbound message should be captured in ORMB.
- Add the external system in the **C1-SourceSystemLookup** extendable lookup
- Create an outbound message type using which you want to create a cancellation outbound message for an individual membership. Here, you must specify the following:
  - The **C1-MemberCancRequest** business object using which you want to create the cancellation outbound messages for the individual memberships.
  - An external system to which you want to send the cancellation outbound messages that are created using the outbound message type.
- Create a delinquency process type using which you want to create a delinquency process to initiate cancellation request through an outbound message. For more information on how to design a delinquency process type to initiate cancellation request for an individual membership, see Individual Membership Cancellation Delinquency Process on page 4078.

Once the status reason of the individual memberships is set to the status reason which is specified in the **Awaiting Membership Cancellation Reason** attribute of the delinquency process preference, you need to execute the **C1-MTOMT** batch to generate the cancellation outbound messages for the individual memberships. For more information about the batch, see Outbound Message Generation for Delinquency Management on page 4189.

Note: The system considers the delinquency process preference which is specified in the **Delinquency Process Field Mapping** option type of the **DELINPROC** feature configuration. For more information about the feature configuration, see Setting the DELINPROC Feature Configuration on page 4442.

For more information on...	See...
Membership Cancellation Outbound Message Schema	Membership Cancellation Outbound Message Schema on page 4183
Membership Cancellation Outbound Message XML Format	Membership Cancellation Outbound Message XML Format on page 4183
Sample Membership Cancellation Outbound Message	Sample Membership Cancellation Outbound Message on page 4187

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Membership Cancellation Outbound Message Schema

The following code snippet illustrates how the tags are nested in the membership cancellation outbound message schema:

```
<schema>
    <xmlRawResponse></xmlRawResponse>
    <xmlResponse></xmlResponse>
    <outboundMessageId></outboundMessageId>
    <notificationExternalId></notificationExternalId>
    <type></type>
    <processingMethod></processingMethod>
    <status></status>
    <extract></extract>
    <batchControl></batchControl>
    <batchNumber></batchNumber>
    <creationDateTime></creationDateTime>
    <messageCategory></messageCategory>
    <messageNumber></messageNumber>
    <processSignature></processSignature>
    <version></version>
    <xmlSource>
        <healthPlanCode></healthPlanCode>
        <externalMembershipId></externalMembershipId>
        <membershipId></membershipId>
        <delinquencyProcessId></delinquencyProcessId>
        <mainSubscriberPersonId></mainSubscriberPersonId>
        <mainSubscriberPersonIdentifierType></mainSubscriberPersonIdentifierType>
        <mainSubscriberPersonIdentifier></mainSubscriberPersonIdentifier>
        <mainSubscriberName></mainSubscriberName>
        <mainSubscriberRelationshipType></mainSubscriberRelationshipType>
        <startDate></startDate>
        <endDate></endDate>
        <paidThroughDate></paidThroughDate>
        <cancelReason></cancelReason>
        <cancelReasonDescription></cancelReasonDescription>
        <billedAmount></billedAmount>
        <paidAmount></paidAmount>
    </xmlSource>
    <errorDetails></errorDetails>
    <ilmDate></ilmDate>
    <isEligibleForArchiving></isEligibleForArchiving>
</schema>
```

Membership Cancellation Outbound Message XML Format

Note:

We recommend you to refer the membership cancellation outbound message schema in parallel while understanding the below mentioned tags. This will help you to understand how the tags are nested in the schema.

At present, the membership cancellation outbound message is not delivered to the external system. The mechanism to deliver the membership termination outbound message is handled by the implementation team.

Tag Name	Tag Description	Mandatory (Yes or No)
schema	Used to specify the tags of a membership cancellation outbound message.	Yes
xmlRaw	Displays the unchanged information from an external source system when:	Not Applicable

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Tag Name	Tag Description	Mandatory (Yes or No)
Response	• A response XSL file is defined on the external system. • An outbound message type is associated with the outbound message. **Note:** At present, this tag does not contain any information.	
xmlResponse	Displays the information from an external source system which is invoked by the real-time message. **Note:** At present, this tag does not contain any information.	Not Applicable
outbound MessageId	Used to specify the outbound message ID.	Not Applicable
notification ExternalId	Used to specify the external source system ID.	Not Applicable
type	Used to specify the outbound message type using which you want to create the membership cancellation outbound message. **Note:** You must specify an outbound message type which is already defined in the system.	Not Applicable
processingMethod	Used to specify the method implemented in processing the membership cancellation outbound message. The valid value is: • **Batch**	Not Applicable
status	Indicates the status of the outbound message.	Not Applicable
extract	Indicates the action for processing the records in the batch. The valid values are: • **Can be Extracted** - Used when the records are created with a processing method of a batch. • **Not to be Extracted** - Used when the processing should be held for some reason.	Not Applicable
batchControl	Used to indicate the batch control for the membership termination outbound message.	Not Applicable
batchNumber	Used to specify the batch number.	Not Applicable
creation DateTime	Used to specify the date and time when the membership cancellation outbound message is processed.	Not Applicable
messageCategory	Used to specify the category to which the error message belongs.	Not Applicable
messageNumber	Used to specify the error code.	Not Applicable
processSignature	Used to specify the process signature.	Not Applicable
version	Used to specify the version.	Not Applicable

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Tag Name	Tag Description	Mandatory (Yes or No)
xmlSource	Used to specify the tag information for the membership termination outbound message.	Yes
delinquency ProcessId	Used to specify the delinquency process ID.	Yes
health PlanCode	Used to specify the unique identifier for the health plan.	Yes
external MembershipId	Used to specify the external membership ID. **Note:** Here, you need to specify a membership ID which is maintained in the external source system.	No
membershipId	Used to specify the membership ID.	Yes
mainSubscriber PersonId	Used to specify the person ID who is the main subscriber of the membership.	Yes (Conditional) **Note:** This data is required while defining or editing the respective information.
mainSubscriber PersonIdentifier Type	Used to specify the primary person identifier of the main subscriber of the membership.	Yes (Conditional) **Note:** This data is required while defining or editing the respective information.
mainSubscriber PersonIdentifier	Used to specify the value of the main subscriber person identifier type.	Yes (Conditional) **Note:** This data is required while defining or editing the respective information.
main SubscriberName	Used to specify the name of the main subscriber.	Yes (Conditional) **Note:** This data is required while defining or editing the respective information.
mainSubscriber RelationshipType	Used to specify the member person relationship type of the main subscriber of the membership.	Yes (Conditional)

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Tag Name	Tag Description	Mandatory (Yes or No)
		Note: This data is required while defining or editing the respective information.
startDate	Used to indicate the date from when the membership is effective. **Note:** The startDate cannot be later than the endDate.	Yes
endDate	Used to indicate the date till when the membership is effective. **Note:** The endDate cannot be later than the startDate.	No
paidThrough Date	Used to indicate the paid through date of the account on which the membership is billed.	Yes
cancelReason	Used to specify the reason for membership cancellation.	Yes (Conditional) **Note:** This data is required while defining or editing the respective information.
cancel Reason Description	Used to specify additional information on membership cancellation.	No
billedAmount	Used to specify the summary of all the original amounts of the bills involved in the delinquency process.	Yes
paidAmount	Used to specify the summary of all the unpaid amounts of the bills involved in the delinquency process.	Yes
errorDetails	Displays the error information. **Note:** At present, this tag does not contain any information.	No
ilmDate	Displays the ilm date. **Note:** At present, this tag does not contain any information.	No
isEligibleForArchiving	Displays the ilm archiving switch. The valid values are: • **Y** • **N** **Note:** At present, this tag does not contain any information.	No

Related Topics

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For more information on...	See...
Membership Cancellation Outbound Message Schema	Membership Cancellation Outbound Message Schema on page 4183
Sample Membership Cancellation Outbound Message	Sample Membership Cancellation Outbound Message on page 4187

Sample Membership Cancellation Outbound Message

Using the below example, you can do the following:

- Initiate an outbound message to cancel an individual membership when the main subscriber is delinquent.

Person Name	Main Subscriber	Health Plan Code	Billed Amount	Paid Through Date	Amount Paid
TREVOR, JOHNSON	SELF	APTC_BENEFIT	2500.00	31-09-2023	0.00

```
<schema>
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    <xmlResponse></xmlResponse>
    <outboundMessageId></outboundMessageId>
    <notificationExternalId></notificationExternalId>
    <type></type>
    <processingMethod></processingMethod>
    <status></status>
    <extract></extract>
    <batchControl></batchControl>
    <batchNumber></batchNumber>
    <creationDateTime></creationDateTime>
    <messageCategory></messageCategory>
    <messageNumber></messageNumber>
    <processSignature></processSignature>
    <version></version>
    <xmlSource>
        <healthPlanCode>APTC_BENEFIT</healthPlanCode>
        <externalMembershipId>TREV_JOHNSON_1990</externalMembershipId>
        <membershipId>199027061071452</membershipId>
        <delinquencyProcessId>105284384641</delinquencyProcessId>
        <mainSubscriberPersonId>0334838136</mainSubscriberPersonId>
        <mainSubscriberPersonIdentifierType>WEB</mainSubscriberPersonIdentifierType>
        <mainSubscriberPersonIdentifier>
        TREV_35704014_M01
        </mainSubscriberPersonIdentifier>
        <mainSubscriberName>TREVOR,JOHNSON</mainSubscriberName>
        <mainSubscriberRelationshipType>OWNER</mainSubscriberRelationshipType>
        <startDate>2023-01-01</startDate>
        <endDate>2023-12-31</endDate>
        <paidThroughDate></paidThroughDate>
        <cancelReason>INDV_MEM_CNC</cancelReason>
        <cancelReasonDescription>
        Membership Awaiting Cancellation
        </cancelReasonDescription>
        <billedAmount>2500.00</billedAmount>
        <paidAmount>0.00</paidAmount>
    </xmlSource>
    <errorDetails></errorDetails>
    <ilmDate></ilmDate>
    <isEligibleForArchiving></isEligibleForArchiving>
</schema>
```

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Note: We have given the above sample to illustrate how the tags should be nested while sending an membership cancellation outbound message to the external system. However, you should not seamlessly use this sample in your environment because the required pre-requisite data may not be available in your environment. In such case, the system will give erroneous results.

Creating Customer Contacts for Each Membership Billed to Delinquent Customer or Account

If you send a debt collection letter to a delinquent customer or account through a delinquency process, you can configure the system to create a customer contact for the main subscriber of each membership which is billed to the delinquent customer or account. The system creates a customer contact for the main subscriber of each membership whenever an event is triggered in the delinquency process to send a debt collection letter.

Two fields named **Send Membership Level Notification Source** and **Send Membership Level Notification** field are available when you add a delinquency event type in a delinquency process type. You can set the **Send Membership Level Notification Source** field to either **Delinquency Process Type** or **Algorithm**. If you set the **Send Membership Level Notification Source** field to **Delinquency Process Type**, the system derives the value for the **Send Membership Level Notification** field corresponding to the respective event type from the delinquency process type. However, if you set the **Send Membership Level Notification Source** field to **Algorithm**, the system derives the value for the **Send Membership Level Notification** field from a business rule. To derive the value from the business rule, the system uses the **C1-DERMLNBR** algorithm attached to the **Send Member Level Notification Option Derivation** system event in the respective delinquency process type. For more information, see C1-DERMLNBR on page 4156. Note that these fields are applicable only when the delinquency event is triggered in the delinquency process to send a debt collection letter (such as, warning, dunning, or harsh letters) to the delinquent customer or account.

If the value of the **Send Membership Level Notification** field is set to **Send Membership Level Notification Required** either in the delinquency process type or in the business rule depending on the send membership level notification source, the system derives the memberships billed to the delinquent customer or account. It then checks whether the number of memberships derived is less than or equal to the value specified in the **Member Level Notification Deferred Processing Threshold** parameter of the **C1-DLQSENDCC** algorithm. If the number of memberships derived is less than or equal to the specified value, the system creates a customer contact for the main subscriber of each derived membership in the real time (i.e. immediately). In addition, the status of the delinquency event is changed to **Complete**.

However, if no value is defined for the **Member Level Notification Deferred Processing Threshold** parameter or if the number of memberships derived is greater than the specified value, the system changes the status of the delinquency event to **Pending Contact Creation**.

The **C1-MBRNT** batch considers the delinquency processes which have at least one delinquency event in the **Pending Contact Creation** status. It then derives the memberships billed to the delinquent customer or account and creates a customer contact for the main subscriber of each derived membership.

In addition, this algorithm does the following:

- Creates a log entry for each customer contact in the delinquency process.
- Stamps the delinquency process ID as a characteristic using the given characteristic type on the customer contact.
- Stamps the membership ID as a characteristic using the given characteristic type on the customer contact.

Note: Once a customer contact is created, a record is added in the **C1_DELIN_PROC_EVT_NOTIF** table where the **DP_EVT_NOTIF_TYPE_FLG** column is set to CC and the **DP_EVT_NOTIF_ID** column is set to the customer contact ID.

This batch derives the preferred contact method for the customer contact. While deriving the preferred contact method, the batch first fetches the main customer's bill route type on the account and then fetches the bill routing method of the bill route type. Once the bill routing method is derived, the system considers the preference which is specified in the **Routing Method – Contact Method Mapping** option type of the **DELINPROC** feature configuration. For more information about the feature configuration, see Setting the DELINPROC Feature Configuration on page 4442. It then

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checks whether any preferred contact method is mapped to the bill routing method in the preference. If the preferred contact method is mapped to the bill routing method in the preference, the system stamps it on the customer contact. However, if the preferred contact method is not mapped to the bill routing method in the preference, the system considers the default contact method as the preferred contact method and stamps it on the customer contact.

This batch is a multi-threaded batch. The multi-threading is based on membership ID and chunks for multi-threading are created based on numerical distribution of membership ID. For more information about the batch, see *Oracle Revenue Management and Billing Batch Guide*.

Outbound Message Generation for Delinquency Management

The **C1-MTOMT** batch is used to create the termination and cancellation outbound messages whenever the termination or cancellation process is initiated for the individual memberships through the **Delinquency Management** feature. It creates the termination and cancellation outbound messages using the given outbound message types for the individual memberships which have the given status and status reasons. In addition, it adds a log for the outbound message in the respective individual membership and delinquency process.

This batch is a multi-threaded batch. The multi-threading is based on membership ID and chunks for multi-threading are created based on numerical distribution of membership ID. For more information about the batch, see *Oracle Revenue Management and Billing Batch Guide*.

Note: The system considers the delinquency process preference which is specified in the **Delinquency Process Field Mapping** option type of the **DELINPROC** feature configuration. For more information about the feature configuration, see Setting the DELINPROC Feature Configuration on page 4442.

Allocate Advance Deposit for Delinquent Customers

In the fully insured group business, the group customers may opt to pay the advance deposit upfront so that it can be used in case of delinquency to settle unpaid amount. The group customer may pay the advance deposit at the parent customer or policy level. Oracle Revenue Management and Billing enables you to park the advance deposit received from the group customers at the parent customer or policy level.

If you create a bill with charges from multiple policies, then the system should receive advance deposit at the parent customer level. The system will then use the advance deposit to pay unpaid bills of all the policies of the parent customer where he is the policy holder. The system enables you to create an account at the parent customer level to park the advance deposit. However, if you create a bill with charges from a single policy, then the system should receive advance deposit at the policy level. The system will then use the advance deposit to pay unpaid bills of the respective policy. The system enables you to create a policy-specific account at the parent customer level to park the advance deposit.

Maintaining Advance Deposit Details

The system enables you to provide the advance deposit details for a parent customer through a health care inbound message or through a membership repricing request. Similarly, the system enables you to provide the advance deposit details for a policy from the **Policy** screen or through a health care inbound message. You need to provide the following advance deposit details at the parent customer level:

- **Advance Deposit Level** - Used to indicate whether you want to park the advance deposit received from the group customer at the parent customer or policy level. The valid values are:
  - **PG** - Used when you want to park the advance deposit at the parent customer level.
  - **POLI** - Used when you want to park the advance deposit at the policy level.

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The advance deposit level is only applicable for the person whose person type is set to **Parent Customer**. If you do not specify the advance deposit level, then the parent customer is not eligible for the advance deposit either at the parent customer or policy level.

- **Advance Deposit Amount** - Used to specify the advance deposit amount. It is required when the advance deposit level is set to **PG**.
- **Advance Deposit Grace Days** - Used to specify the grace days. The system then uses the grace days to derive the grace period within which the advance deposit should be received from the group customer. While calculating the grace period, the system derives the earliest start date among all the polices where the parent customer is the policy holder and considers it as the grace start date. Once the grace start date is derived, the system calculates the grace end date (i.e. grace start date + grace days). For example, if a parent customer is the policy holder of two policies - P1 (01-Jan-2022 to 31-Dec-2022) and P2 (01-Jun-2022 to 31-Dec-2022) and advance deposit grace days is set to 6 days, then the system considers 01-Jan-2022 as the grace start date (as it is the earliest start date) and sets the grace end date to 07-Jan-2022. The advance deposit grace days is required when the advance deposit level is set to **PG**.
- **Advance Deposit Account Details** - Used to specify the account details for the parent customer when the advance deposit is parked at the parent customer level.
  - **Account Identifier Type** - Used to specify the account identifier type.
  - **Account Identifier** - Used to specify the account identifier.
  - **Account Relationship Type** - Used to specify the account relationship type using which you want to associate the parent customer with the account. Here, you must specify an account relationship type which is specified in the **Advance Deposit Account Relationship Type** attribute of the delinquency process preference.

Note: The system considers the delinquency process preference which is specified in the **Delinquency Process Field Mapping** option type of the **DELINPROC** feature configuration. For more information about the feature configuration, see Setting the DELINPROC Feature Configuration on page 4442.

The respective tags are added to provide the above advance deposit details at the parent customer level in the **C1-HCInboundMessage** business object schema and in the **C1-MembershipRepricing** business service schema. For more information, see Inbound Message on page 2273 and C1-MembershipRepricing Business Service on page 3514

If the advance deposit level of a policy holder (i.e. parent customer) is set to **POLI**, you need to specify the following advance deposit details at the policy level:

- **Advance Deposit Applicability** - Used to indicate whether the advance deposit is applicable for the policy. The valid values are **Y** and **N**. If you do not specify the value, the system, by default, sets it to **N**.
- **Advance Deposit Amount** - Used to specify the advance deposit amount. It is required when the advance deposit applicability is set to **Y**.
- **Advance Deposit Grace Days** - Used to specify the grace days. The system then uses the grace days to derive the grace period within which the advance deposit should be received from the group customer for the policy. While calculating the grace period, the system considers the policy start date as the grace start date. Once the grace start date is derived, the system calculates the grace end date (i.e. grace start date + grace days). For example, if a parent customer is the policy holder of the P1 policy (01-Jan-2022 to 31-Dec-2022) and advance deposit grace days is set to 6 days, then the system considers 01-Jan-2022 as the grace start date and sets the grace end date to 07-Jan-2022. The advance deposit grace days is required when the advance deposit applicability is set to **Y**.
- **Advance Deposit Account Identifier Type** - Used to specify the account identifier type. It is required when the advance deposit applicability is set to **Y**.
- **Advance Deposit Account Identifier** - Used to specify the account identifier. Here, you must specify an account of the policy holder where the account relationship type is set to the value that is specified in the **Advance Deposit Account Relationship Type** attribute of the delinquency process preference. It is required when the advance deposit applicability is set to **Y**.

Note: The system considers the delinquency process preference which is specified in the **Delinquency Process Field Mapping** option type of the **DELINPROC** feature configuration. For more information about the feature configuration, see Setting the DELINPROC Feature Configuration on page 4442.

The respective tags are added to provide the above advance deposit details at the policy level in the **C1-HCInboundMessage** business object schema. For more information, see Inbound Message on page 2273.

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Applying Advance Deposit Payments

You can apply the advance deposit payment on the advance deposit account of the parent customer from the user interface or through an inbound web service. Note that the system distinguishes an account as the advance deposit account when the parent customer is associated with the account using the account relationship type which is specified in the **Advance Deposit Account Relationship Type** attribute of the delinquency process preference. While applying the advance deposit payment against the advance deposit account, you must specify a match type where an algorithm created using the **C1-MATSATYP** algorithm type is attached to the **Payment Distribution Override** algorithm spot.

In the **C1-MATSATYP** algorithm, you must specify a contract type that is specified in the **Advance Deposit Contract Type** attribute of the delinquency process preference. The system then applies the advance deposit payment against an active advance deposit contract of the specified contract type on the advance deposit account. If an active contract of the specified contract type does not exist on the advance deposit account, the system creates an advance deposit contract using the specified contract type and then applies the advance deposit payment against the advance deposit contract.

Note: The system considers the delinquency process preference which is specified in the **Delinquency Process Field Mapping** option type of the **DELINPROC** feature configuration. For more information about the feature configuration, see Setting the DELINPROC Feature Configuration on page 4442

Monitoring Advance Deposit of a Parent Customer

The **C1-ADMON** batch considers all the parent customers where the advance deposit level is set to **PG** or **POLI**. For a parent customer where advance deposit level is set to **PG**, the batch checks whether any customer contact is created using the given customer contact type for the given customer contact class where the respective person ID is stored as a characteristic on the customer contact. The system considers the characteristic type which is specified in the **Person ID Characteristic for Inbound Log** option type of the **C1-ASOBLLNG** feature configuration. If a customer contact exists for the parent customer, the batch does not consider the parent customer for further processing.

However, if a customer contact does not exist for the parent customer, the batch derives the advance deposit amount and advance deposit grace days from the parent customer level. It then calculates the grace end date and checks whether the grace end date is earlier than or equal to batch business date. If so, the system derives the advance deposit account relationship type and advance deposit contract type from the delinquency process preference. The system then derives the parent customer's advance deposit account and advance deposit contract using the advance deposit account relationship type and advance deposit contract type, respectively. The batch then checks whether the payments received against the advance deposit contract exceeds the advance deposit amount. If the sum of payments does not exceed the advance deposit amount, the system creates a customer contact using the given customer contact type for the given customer contact class. In addition, the system considers the characteristic type that is specified in the **Person ID Characteristic for Inbound Log** option type of the **C1-ASOBLLNG** feature configuration and then stamps the person ID using the respective characteristic type on the customer contact. However, if the grace end date is later than the batch business date or if the sum of payments exceeds the advance deposit amount, the system does not consider the parent customer for further processing.

Similarly, for a parent customer where advance deposit level is set to **POLI**, this batch fetches all the policies where the parent customer is the policy holder and where the advance deposit applicability is set to **Y**. The system considers those polices where the parent customer is associated using the policy person role that is specified in the **Parent Customer Policy Person Role** option type of the **C1-ASOBLLNG** feature configuration.

For each such policy, this batch checks whether any customer contact is created using the given customer contact type for the given customer contact class where the respective policy ID is stored as a characteristic on the customer contact. The system considers the characteristic type which is specified in the **Policy Characteristic Type for Customer Contact** attribute of the delinquency process preference. If a customer contact exists for the policy, the batch does not consider the policy for further processing.

However, if a customer contact does not exist for the policy, the batch derives the advance deposit amount and advance deposit grace days from the policy. It then calculates the grace end date and checks whether the grace end date is earlier than or equal to batch business date. If so, the system derives the advance deposit account linked to the policy and

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the advance deposit contract using the advance deposit contract type specified in the delinquency process preference. The batch then checks whether the payments received against the advance deposit contract exceeds the advance deposit amount. If the sum of payments does not exceed the advance deposit amount, the system creates a customer contact using the given customer contact type for the given customer contact class. In addition, the system considers the characteristic type that is specified in the **Policy Characteristic Type for Customer Contact** attribute of the delinquency process preference and then stamps the policy ID using the respective characteristic type on the customer contact. However, if the grace end date is later than the batch business date or if the sum of payments exceeds the advance deposit amount, the system does not consider the policy for further processing.

Note: The system considers the delinquency process preference which is specified in the **Delinquency Process Field Mapping** option type of the **DELINPROC** feature configuration. For more information about the feature configuration, see Setting the DELINPROC Feature Configuration on page 4442.

This batch also derives the preferred contact method for the customer contact. While deriving the preferred contact method, the batch first fetches the main customer's bill route type on the advance deposit account and then fetches the bill routing method of the bill route type. Once the bill routing method is derived, this batch considers the preference which is specified in the **Routing Method - Contact Method Mapping** option type of the **DELINPROC** feature configuration. For more information about the feature configuration, see Setting the DELINPROC Feature Configuration on page 4442.

It then checks whether any preferred contact method is mapped to the bill routing method in the preference. If the preferred contact method is mapped to the bill routing method in the preference, the system stamps it on the customer contact. However, if the preferred contact method is not mapped to the bill routing method in the preference, the system considers the default contact method as the preferred contact method and stamps it on the customer contact.

This batch is a multi-threaded batch. The multi-threading is based on person ID and chunks for multi-threading are created based on numerical distribution of person ID. For more information, see *Oracle Revenue Management and Billing Batch Guide*.

Settling Unpaid Dues Against Advance Deposit through a Delinquency Process

Oracle Revenue Management and Billing enables you to settle the unpaid bill amount of a parent customer using the advance deposit available at the parent customer or policy level through a delinquency process. For example, an advance deposit of $1000 is received from the parent customer through multiple payments as shown below:

The following table lists the advance deposit that is received from the parent customer through multiple payments.

Advance Deposit Payments						
Payment Event ID	**Payment ID**	**Payment Date**	**Payment Amount**	**Payment Segment (SA1)**	**Match Event**	**Match Event Status**
PE1	P1	01-Jan-2020	200	-200	ME1	Open
PE2	P2	05-Jan-2020	200	-200	ME2	Open
PE3	P3	10-Jan-2020	200	-200	ME3	Open
PE4	P4	11-Jan-2020	200	-200	ME4	Open
PE5	P5	15-Jan-2020	200	-200	ME5	Open
Actual Deposit				-1000		
SA1 Contract Balance				-1000		

An advance deposit delinquency process is created for the parent customer which includes two bills - B1 and B2 with the bill segments as shown below:

The following table lists the bill segments of two bills - B1 and B2.

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Bill	Bill Segment	Amount
B1	-	300
	BSEG1 (SA2)	200
	BSEG2 (SA3)	100
B2	-	400
	BSEG1 (SA2)	250
	BSEG2 (SA3)	150

When the apply advance deposit delinquency event is triggered, the system will create four debit adjustments and one credit adjustment as shown in the below table. Note that the system will create the debit adjustments against the payment segments on the advance deposit contract using the debit adjustment type given in the **C1-APPADVDEP** algorithm. While creating the debit adjustments, the system will consider the payments in the ascending order of the payment date. In addition, the system will create one credit adjustment using the credit adjustment type given in the **C1-APPADVDEP** algorithm. This credit adjustment would be matched later in the delinquency process.

The following table illustrates the debit and credit adjustments that are created when the apply advance deposit delinquency event is triggered.

Advance Deposit Payments							**Adjustment**		
Payment Event ID	**Payment ID**	**Payment Date**	**Payment Amount**	**Payment Segment (SA1)**	**Match Event**	**Match Event Status**	**Adjustment**	**Match Event**	**Match Event Status**
PE1	P1	01-Jan-2020	200	-200	ME1	Open	200 (SA1)	ME1	Balanced
PE2	P2	05-Jan-2020	200	-200	ME2	Open	200 (SA1)	ME2	Balanced
PE3	P3	10-Jan-2020	200	-200	ME3	Open	200 (SA1)	ME3	Balanced
PE4	P4	11-Jan-2020	200	-200	ME4	Open	100 (SA1)	ME4	Open
PE5	P5	15-Jan-2020	200	-200	ME5	Open			
Actual Deposit				-1000					
SA1 Contract Balance				-1000					
Credit Adjustment (SA1)							-700	-	-

The system will then create an offset request using the offset request type given in the **C1-APPADVDEP** algorithm. In the offset request, the system will include the credit adjustment (-$700) and two bills - B1 and B2 for which the delinquency process is created. The system will then automatically process the offset request and create the offset request adjustments as shown in the below table. Note that the advance deposit is applied in the ascending order of the bill date. If two or more bills have the same bill date, the system applies the advance deposit in the ascending order of the unpaid amount (i.e. lowest unpaid amount is paid first).

The following table lists the adjustments that are created through an offset request.

Offset Request										
Credit Items					**Debit Items**					
Adjustment	**Offset Request Adjustment**	**Offset Adjustment Amount**	**Match Event**	**Match Event Status**	**Bill**	**Bill Segment**	**Offset Request Adjustment**	**Offset Adjustment Amount**	**Match Event**	**Match Event Status**
CA1 (SA1)	OA11	300	ME10	Balanced	B1	BSEG1 (SA2)	OA2 (SA2)	-200	ME6	Balanced
						BSEG2 (SA3)	OA3 (SA3)	-100	ME7	Balanced
	OA12	400	ME10	Balanced	B2	BSEG1 (SA2)	OA4 (SA2)	-250	ME8	Balanced
						BSEG2 (SA3)	OA5 (SA3)	-150	ME9	Balanced

Once the offset request adjustments are created, the system creates a customer contact depending on whether the advance deposit is fully or partially utilized to pay the delinquent bills. The customer contact is created for the parent customer or for the main customer of the account depending on whether the delinquency process is created at the person or account level. In addition, the system stamps the delinquency process ID as a characteristic on the customer contact and on the advance deposit payments (used for offsetting; in this case P1, P2, P3, and P4). The system considers the characteristic

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type given in the **C1-APPADVDEP** algorithm. For more information about the algorithm, see C1-APPADVDEP on page 4094.

The status of the delinquency process will remain as **Delinquency In Progress**. On executing the **C1-DPMON** batch, the system checks whether the delinquency process meets the cancel criteria. If so, the system will change the status of the delinquency process to **Canceled**.

For more information about the advance deposit delinquency process, see Advance Deposit Delinquency Process on page 4083.

Notification on Receiving Advance Deposit

Oracle Revenue Management and Billing enables you to send notification via a customer contact when the advance deposit payment is received fully for a customer at the parent customer or policy level. To enable this feature, you need to attach an algorithm created using the **C1-NOTADREC** algorithm type to the **Payment Freeze** system event of the parent customer's customer class.

This algorithm checks whether the payment is made on a contract which is created using a contract type specified in the **Advance Deposit Contract Type** attribute of the delinquency process preference. If the payment is not made on a contract of the advance deposit contract type, no action takes place while freezing the payment. However, if the payment is made on a contract of the advance deposit contract type, this algorithm checks whether the advance deposit contract is linked to any policy. If so, the system derives the advance deposit amount specified on the policy and then checks whether the sum of payments received on the advance deposit contract is greater than or equal to the advance deposit amount specified on the policy. If so, the system creates a customer contact using the given customer contact type for the given customer contact class. In addition, the system stamps the policy ID as a characteristic on the customer contact using the characteristic type which is specified in the **Policy Characteristic Type for Customer Contact** option type of the **DELINPROC** feature configuration. However, if the sum of payments received on the advance deposit contract is less than the advance deposit amount, no action takes place while freezing the payment.

If the advance deposit contract is not linked to any policy, the system derives the account for which the advance deposit contract is created. The system then derives the person who is associated with the account using the relationship type which is specified in the **Advance Deposit Account Relationship Type** attribute of the delinquency process preference. Once the person is derived, the system derives the advance deposit amount specified at the parent customer level. The system then checks whether the sum of payments received on the advance deposit contract is greater than or equal to the advance deposit amount specified at the parent customer level. If so, the system creates a customer contact using the given customer contact type for the given customer contact class. However, if the sum of payments received on the advance deposit contract is less than the advance deposit amount, no action takes place while freezing the payment.

This algorithm also derives the preferred contact method for the customer contact. While deriving the preferred contact method, this algorithm first fetches the main customer's bill route type on the advance deposit account and then fetches the bill routing method of the bill route type. Once the bill routing method is derived, the system considers the preference which is specified in the **Routing Method - Contact Method Mapping** option type of the **DELINPROC** feature configuration. For more information about the feature configuration, see Setting the DELINPROC Feature Configuration on page 4442.

It then checks whether any preferred contact method is mapped to the bill routing method in the preference. If the preferred contact method is mapped to the bill routing method in the preference, the system stamps it on the customer contact. However, if the preferred contact method is not mapped to the bill routing method in the preference, the system considers the default contact method as the preferred contact method and stamps it on the customer contact.

Note: The system considers the delinquency process preference which is specified in the **Delinquency Process Field Mapping** option type of the **DELINPROC** feature configuration. For more information about the feature configuration, see Setting the DELINPROC Feature Configuration on page 4442.

This algorithm contains the following parameters:

- **Customer Contact Type** - Used to indicate the customer contact type using which you want to create the customer contact. Here, you must specify a customer contact type with the appropriate letter template depending on the type of letter you want to send to the customer.

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- **Customer Contact Class** - Used to indicate the customer contact class to which the customer contact type belongs.
- **Default Contact Method** - Used to indicate the contact method that you want to use when the preferred contact method cannot be derived for the routing method from the preference.

All these parameters are mandatory.

Notification on Advance Deposit Cancellation

Oracle Revenue Management and Billing enables you to send notification via a customer contact when the payment on the advance deposit contract is canceled. To enable this feature, you need to attach an algorithm created using the **C1-NOTADCAN** algorithm type to the **Payment Cancellation** system event of the parent customer's customer class.

This algorithm checks whether the payment is made on a contract which is created using a contract type specified in the **Advance Deposit Contract Type** attribute of the delinquency process preference. The system considers the delinquency process preference which is specified in the **Delinquency Process Field Mapping** option type of the **DELINPROC** feature configuration. For more information about the feature configuration, see Setting the DELINPROC Feature Configuration on page 4442

If the payment is not made on a contract of the advance deposit contract type, no action takes place while canceling the payment. However, if the payment is made on a contract of the advance deposit contract type, this algorithm checks whether the cancel reason specified while canceling a payment is listed in the **Advanced Deposit Payment Cancel Reason List** parameter. If so, the system creates a customer contact using the given customer contact type for the given customer contact class. If the advance deposit contract is linked to a policy, the system stamps the policy ID as a characteristic on the customer contact using the characteristic type which is specified in the **Policy Characteristic Type for Customer Contact** option type of the **DELINPROC** feature configuration.

However, if the cancel reason specified while canceling a payment is not listed in the **Advanced Deposit Payment Cancel Reason List** parameter, no action takes place while canceling the payment. If the advance deposit payment is already used to settle an overdue bill through a delinquency process, the system does the following:

- Cancels the debit adjustments created against the advance deposit payment.
- Cancels the credit adjustments used to offset the overdue bills through a delinquency process.
- Unapplies or cancels the offset request. If the number of transfer or offset adjustments does not exceed the online record process limit (defined in the **C1-DFRUNAPLY** algorithm), the system cancels the frozen transfer or offset adjustments immediately and then changes the status of the offset request to **Unapplied Offset**. However, if the number of transfer or offset adjustments exceeds the online record process limit (defined in the **C1-DFRUNAPLY** algorithm), the system changes the status of the offset request to **Defer Unapplied**.

Note:

On executing the **Offset Request Periodic Monitor** (**C1-OFSRQ**) batch, the system considers the offset requests which are in the **Defer Unapplied** status. The system then cancels the frozen transfer or offset adjustments of the offset request and changes the status of the offset request to **Unapplied Offset**.

The system then executes the **C1-CDPPAYCAN** algorithm attached to the **Payment Cancellation** system event of the parent customer's customer class. It changes the status of the delinquency process. For more information about the algorithm, see Resuming a Delinquency Process on Payment Cancellation on page 4171

Always ensure that you attach the following algorithms to the **Payment Cancellation** system event in the specified sequence:

1. C1-NOTADCAN
2. C1-CDPPAYCAN

This algorithm contains the following parameters:

- **Customer Contact Type** - Used to indicate the customer contact type using which you want to create the customer contact. Here, you must specify a customer contact type with the appropriate letter template depending on the type of letter you want to send to the customer.

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- **Customer Contact Class** - Used to indicate the customer contact class to which the customer contact type belongs.
- **Default Contact Method** - Used to indicate the contact method that you want to use when the preferred contact method cannot be derived for the routing method from the preference.
- **Advanced Deposit Payment Cancel Reason List** - Used to specify a comma-separated list of payment cancel reasons that the system should consider while notifying customers on payment cancelation. The system uses this parameter to distinguish between advance deposit transfer and advance deposit cancellation. You can specify maximum five comma-separated values for this parameter. Here, you must specify a payment cancel reason which is already defined in the system.
- **Offset Request Defer Unapply Status Code** - Used to specify the status to which you want to transition the offset request when an advance deposit payment is canceled. You must specify a status code which is already defined in the lifecycle of the **C1-OffsetRequest** business object.
- **Offset Request Defer Unapply Status Reason** - Used to specify the reason why you want to unapply or cancel the offset request. You must specify a reason which is already defined for the **Defer Unapplied** status of the **C1-OffsetRequest** business object in the **Status Reason** screen.

All these parameters are mandatory.

Algorithm Used in Delinquency Control

The following table lists the algorithms which are attached to the **C1-DelinControl** business object:

System Event	Algorithm	Algorithm Type	Description
Validation	C1-VALDQCL	C1-VALDQCL	See C1-VALDQCL on page 4196

C1-VALDQCL

This algorithm validates that at least one algorithm should be plugged in for a delinquency control monitor rule.

Algorithms Used in Delinquency Process Type

The following table lists the algorithms which are attached to the **C1-DelinProcType** business object:

System Event	Algorithm	Algorithm Type	Description
Validation	C1-VALDQPT	C1-VALDQPT	See C1-VALDQPT on page 4196

C1-VALDQPT

This algorithm validates the **Delinquency Process Type (C1-DelinProcType)** business object. It will check whether the calculate unpaid and original amount, and the cancel criteria algorithm is configured. It also checks whether the duplicate algorithms is configured in the delinquency process type.

Algorithm Used in C1-DelinquencyProcess

The following table lists the algorithms which are used in the lifecycle of the **C1-DelinquencyProcess** business object.

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Status	System Event	Algorithm	Algorithm Type	Description
Initiated	Enter	C1-DPEVTCR	C1-DPEVTCR	Refer to C1-DPEVTCR on page 4198
Initiate Hold	Enter	C1-EVALDPAPP	C1-EVALDPAPP	Refer to C1-EVALDPAPP on page 4199
On Hold	Enter	C1-DPLGHLDRL	C1-DPLGHLDRL	Refer to C1-DPLGHLDRL on page 4200
Initiate Release	Enter	C1-EVALDPAPP	C1-EVALDPAPP	Refer to C1-EVALDPAPP on page 4199
Released	Enter	C1-RECALCHLD	C1-RECALCHLD	Refer to C1-RECALCHLD on page 4200
		C1-DPLGHLDRL	C1-DPLGHLDRL	Refer to C1-DPLGHLDRL on page 4200
		C1-TRANSPRV	C1-TRANSPRV	Refer to C1-TRANSPRV on page 4201
Initiate Cancel	Enter	C1-EVALDPAPP	C1-EVALDPAPP	Refer to C1-EVALDPAPP on page 4199
Canceled	Enter	C1-DPCAN	C1-DPCAN	Refer to C1-DPCAN on page 4201
	Exit	C1-RECALCTG	C1-RECALCTG	Refer to C1-RECALCTG on page 4201
Pending Termination	Enter	C1-TRPOLPTRM	C1-TRPOLPTRM	Refer to C1-TRPOLPTRM on page 4202
		C1-MEMTRMRSN	C1-MEMTRMRSN	Refer to C1-MEMTRMRSN on page 4202
Customer Terminated	Enter	C1-CRDPTERM	C1-CRDPTERM	Refer to C1-CRDPTERM on page 4203
		C1-DLQCCDPS	C1-DLQCCDPS	Refer to C1-DLQCCDPS on page 4203
Initiate Reinstate	Enter	C1-EVALDPAPP	C1-EVALDPAPP	Refer to C1-EVALDPAPP on page 4199
Reinstate	Enter	C1-CHKREIRUL	C1-CHKREIRUL	Refer to C1-CHKREIRUL on page 4205
		C1-EVALCUSST	C1-EVALCUSST	Refer to C1-EVALCUSST on page 4205
Pending Reinstatement	Enter	C1-TRPOLPREI	C1-TRPOLPREI	Refer to C1-TRPOLPREI on page 4206
Customer Reinstated	Enter	C1-UPDDLQRC	C1-UPDDLQRC	Refer to C1-UPDDLQRC on page 4206

C1-VALDQPR

This algorithm validates the following in the delinquency process business object:

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- Validates whether the delinquency entity ID in the primary table is a valid PER_ID or ACCT_ID depending on the delinquency entity type on the delinquency process type.
- Validates that the collection method on the collection class linked this PER_ID or ACCT_ID is **Self-Control Delinquency**.
- Validates that if the collection object on the process type is 'BILL' then the pk_value1 for each record in the delinquency process related objects list is a valid BILL_ID.
- Objects collected on must belong to the same Person/Account defined on the delinquency process.

C1-DPEVTCR

This algorithm is invoked when the status of a delinquency process is set to **Initiated**. It creates a delinquency event of each delinquency event type that is added in the delinquency process type using which the delinquency process is created. If the delinquency event trigger mode is set to **Manual** in the delinquency process type, the status of the delinquency event is set to **Pending**. However, if the delinquency event trigger mode is set to **Automatic or Manual** or **Automatic** in the delinquency process type, the status of the delinquency event is set to **Pending Evaluation**.

Once the delinquency events are created for the delinquency process, this algorithm does the following:

- Sets the delinquency due date of the delinquency process to the latest bill due date
- Derives the grace period from the delinquency process type or using an algorithm attached to the **Grace Period Derivation** system event depending on the grace period source which is specified in the delinquency process type

Note: For more information about the **C1-DERGRBR** algorithm attached to the **Grace Period Derivation** system event, see Algorithms Used in Delinquency Process Type on page 4196.

- Sets the grace start date in the following manner:

  The following table lists the trigger date calculation mode, usage basis, and grace start date basis which are used in defining the grace start date for the delinquency process.

Trigger Date Calculation Mode	Usage Basis	Grace Start Date Basis	Grace Start Date is set to…
Latest Bill Due Date with Grace Period	-	-	Latest Bill Due Date
Usage Basis	Delinquency Process Creation Date	-	Delinquency Process Creation Date
Usage Basis	Grace Start Date	Latest Bill Due Date	Latest Bill Due Date
Usage Basis	Grace Start Date	X Days after Latest Bill Due Date	Latest Bill Due Date + Add Days To Due Date
Usage Basis	Grace Start Date	Delinquency Process Creation Date	Delinquency Process Creation Date
Usage Basis	Latest Bill Date	-	Latest Bill Date
Usage Basis	Latest Bill Due Date	-	Latest Bill Due Date

- Calculates the grace end date in the following manner:

  The following table lists the trigger date calculation mode, usage basis, grace start date basis, and grace start date which are used in defining the grace end date for the delinquency process.

Trigger Date Calculation Mode	Usage Basis	Grace Start Date Basis	Grace Start Date	Grace End Date is set to…
Latest Bill Due Date with Grace Period	-	-	Latest Bill Due Date	Grace Start Date + Grace Period + Drag

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Trigger Date Calculation Mode	Usage Basis	Grace Start Date Basis	Grace Start Date	Grace End Date is set to…
				Days (if any, defined at the respective level (i.e. account or person)
Usage Basis	Delinquency Process Creation Date	-	Delinquency Process Creation Date	Grace Start Date + Grace Period
Usage Basis	Grace Start Date	Latest Bill Due Date	Latest Bill Due Date	Grace Start Date + Grace Period
Usage Basis	Grace Start Date	X Days after Latest Bill Due Date	Latest Bill Due Date + Add Days To Due Date	Grace Start Date + Grace Period
Usage Basis	Grace Start Date	Delinquency Process Creation Date	Delinquency Process Creation Date	Grace Start Date + Grace Period
Usage Basis	Latest Bill Date	-	Latest Bill Date	Grace Start Date + Grace Period
Usage Basis	Latest Bill Due Date	-	Latest Bill Due Date	Grace Start Date + Grace Period

Note:

This algorithm adds the delinquency event records in the **C1_DELIN_PROC_EVT** table.

This algorithm does not calculate the trigger date and preview date for the events when delinquency event trigger mode is set to **Manual** in the delinquency process type. However, the system calculates the trigger date and preview date for the events when delinquency event trigger mode is set to **Automatic or Manual** or **Automatic** in the delinquency process type while executing the **C1-DPEVL** batch.

This algorithm maintains the delinquency due date, grace start date, grace period, and grace end date for a delinquency process in the **C1_DELIN_PROC** table.

This algorithm is applicable for both the fully insured group and fully insured individual businesses.

C1-EVALDPAPP

This algorithm is invoked when you manually perform the following actions:

- **Hold a Delinquency Process** - This algorithm is invoked when the status of a delinquency process is set to **Initiate Hold**. It checks whether the approval is required for the **Hold** action in the respective delinquency process type. If the approval is not required while manually holding the delinquency process, the status of the delinquency process is immediately changed to the value (for example, **On Hold**) specified in the **Delinquency Process Hold Status** attribute of the delinquency process preference. A hold record is created for the delinquency process in the **Active** status. However, if the approval is required while manually holding the delinquency process, an approval record is created in the **Approval In Progress** status. A To Do is created using the approval To Do type to approve the manual hold and assigned to the users with the approval To Do role. In addition, the status of the delinquency process is changed to the value (for example, **Delinquency In Progress - Exception Raised**) specified in the **Delinquency Process Approval In Progress Status** attribute of the delinquency process preference.
- **Cancel a Delinquency Process** - This algorithm is invoked when the status of a delinquency process is set to **Initiate Cancel**. It checks whether the approval is required for the **Cancel** action in the respective delinquency process type. If the approval is not required while manually canceling the delinquency process, the status of the delinquency process is changed to the value (for example, **Canceled**) specified in the **Delinquency Process Canceled Status**

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attribute of the delinquency process preference. However, if the approval is required while manually canceling the delinquency process, an approval record is created in the **Approval In Progress** status. A To Do is created using the approval To Do type to approve the manual cancellation and assigned to the users with the approval To Do role. In addition, the status of the delinquency process is changed to the value (for example, **Delinquency In Progress - Exception Raised**) specified in the **Delinquency Process Approval In Progress Status** attribute of the delinquency process preference.

- **Release Hold on a Delinquency Process** - This algorithm is invoked when the status of a delinquency process is set to **Initiate Release**. It checks whether the approval is required for the **Release Hold** action in the respective delinquency process type. If the approval is not required while manually releasing the hold on the delinquency process, the status of the delinquency process is immediately changed to its previous status (i.e. **Initiated**, **Delinquency In Progress**, or **Pending Termination**). In addition, the hold end date is set to the date when you manually release the hold on the delinquency process. Finally, the status of hold record is changed to **Completed**. However, if the approval is required while manually releasing the hold on the delinquency process, an approval record is created in the **Approval In Progress** status. A To Do is created using the approval To Do type to approve the manual hold release and assigned to the users with the approval To Do role. In addition, the status of the delinquency process is changed to the value (for example, **Delinquency In Progress - Exception Raised**) specified in the **Delinquency Process Approval In Progress Status** attribute of the delinquency process preference.
- **Reinstate a Delinquency Process** - This algorithm is invoked when the status of a delinquency process is set to **Initiate Reinstate**. It checks whether the approval is required for the **Request Reinstatement** action in the respective delinquency process type. If the approval is not required while manually reinstating the delinquency process, the status of the delinquency process is changed to the value (for example, **Reinstate**) specified in the **Delinquency Process Reinstate Status** attribute of the delinquency process preference. However, if the approval is required while manually reinstating the delinquency process, an approval record is created in the **Approval In Progress** status. A To Do is created using the approval To Do type to approve the manual reinstatement and assigned to the users with the approval To Do role. In addition, the status of the delinquency process is changed to the value (for example, **Delinquency In Progress - Exception Raised**) specified in the **Delinquency Process Approval In Progress Status** attribute of the delinquency process preference.

Note:

Reinstating a delinquency process is only applicable for the fully insured group business.

The system considers the approval To Do type and approval To Do role specified in the respective delinquency process type. If the approval To Do role is not specified in the respective delinquency process type, the system considers the default To Do role associated with the approval To Do type.

This algorithm is applicable for both the fully insured group and fully insured individual businesses.

C1-DPLGHLDRL

This algorithm creates a delinquency process log entry when Delinquency Process record enters Hold and Release status.

It is applicable for both Fully Insured Group and Individual line of business.

C1-RECALCHLD

This algorithm is configured on the 'Released' status on the Delinquency Process Business Object. Whenever a delinquency process is released after hold, the trigger dates for the non-triggered events should be recalculated by adding the hold days.

It is applicable for both Fully Insured Group and Individual line of business.

Determine Hold days = delinquency process release date - delinquency process hold date

New trigger Date (for remaining events) = Old Trigger Date + Hold Days

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C1-TRANSPRV

This algorithm is configured on the 'Released' status on the Delinquency Process Business Object.

Whenever a delinquency process is released after hold, the delinquency process needs to be moved to the status in which it was earlier (before hold).

It is applicable for both Fully Insured Group and Individual line of business.

C1-DPCAN

This algorithm is invoked when the status of a delinquency process is changed to **Canceled**. It does the following:

- Creates a To Do notification with the cancel reason
- If there is any hold record for the delinquency process in the **Active** status, this algorithm changes the status of the hold record to **Complete**.
- If there is any pending record for approval at the delinquency event or process level, this algorithm changes the status of pending approval records to **Expired**.

This algorithm contains the following parameters:

- **To Do Type** - Used to indicate the To Do type using which you want to create a To Do when the delinquency process is canceled. This parameter is required.
- **To Do Role** - Used to indicate that users with the specified To Do role must receive the To Do notification. This parameter is optional. If you do not specify this parameter, this algorithm considers the default To Do role associated with the To Do type.
- **To Do Entry required for Individual Delinquency (Valid Values - Y/N)** - Used to indicate whether the To Do notification should be created on canceling a delinquency process for the fully insured individual business. The valid values are **Y** and **N**. Note that this parameter is not applicable for the fully insured group business. This algorithm will create a To Do notification on canceling a delinquency process for the fully insured group business irrespective of whether this parameter is set to **Y** or **N**.

Note: This algorithm is applicable for both the fully insured group and fully insured individual businesses.

C1-RECALCTG

This algorithm is invoked when the status of a delinquency process is changed from **Canceled** to **Initiated**, **Delinquency In Progress**, or **On Hold**. This happens when the payment or adjustment made against the overdue bill, for which the delinquency process is created, is canceled due to any reason.

This algorithm recalculates the trigger date for the delinquency events which are in the **Pending** status. It derives the difference between the delinquency process resume date and delinquency process cancellation date. These extra days are then added to the existing trigger date of the pending delinquency events and thereby the new trigger dates are calculated for the remaining events. If the **Consider Work Days** option is selected in the respective delinquency process type, the system derives the work calendar of the division to which the person or account belongs. The system then checks whether the new trigger date falls on the working (i.e. business) day. If the new trigger date does not fall on the working (i.e. business) day, the system will accordingly add days to the new trigger date to ensure that it falls on the next working day.

Note: This algorithm is applicable for both the fully insured group and fully insured individual businesses.

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C1-TRPOLPTRM

This algorithm is invoked when the status of a delinquency process is changed to **Pending Termination**. It changes the status of all active policies which are billed to the delinquent person or account to a status (i.e. **Pending Termination**) which is specified in the **Pending Termination Policy Status** parameter. While deriving an active policy, the system considers the active status code which is specified in the **Active Policy Status** parameter.

In addition, this algorithm does the following:

- Stamps the termination date and termination reason corresponding to the respective policy
- Creates a log entry in each policy indicating that it is terminated due a delinquency process
- Creates a log entry for each policy in the delinquency process
- Stamps the delinquency process ID as a characteristic using the **C1-DELPO** characteristic type on the policy

It contains the following parameters:

- **Active Policy Status** - Used to specify the active status code of a fully insured group policy. Here, you must specify the status code which is defined in the lifecycle of the **C1-POLICY** business object.
- **Pending Termination Policy Status** - Used to specify the pending termination status code of a fully insured group policy. Here, you must specify the status code which is defined in the lifecycle of the **C1-POLICY** business object.

Both these parameters are mandatory.

Note:

The system derives the policies using an algorithm which is attached to the **Policies Derivation** system event of the respective delinquency process type.

This algorithm is only applicable for the fully insured group business.

C1-MEMTRMRSN

This algorithm is invoked when the status of a delinquency process is changed to **Pending Termination**. It updates the status reason of the active individual memberships which are billed to the delinquent account. The system considers the active individual memberships depending on the value defined for the **Skip Termination of Guaranteed Available Memberships(Valid Values-Y,N)** parameter. If the **Skip Termination of Guaranteed Available Memberships(Valid Values-Y,N)** parameter is set to **Y**, the system does not consider the active individual memberships where the **Evaluate Guaranteed Availability** flag is set to **true**. However, if the **Skip Termination of Guaranteed Available Memberships(Valid Values-Y,N)** parameter is set to **N**, the system considers the active individual memberships irrespective of whether the **Evaluate Guaranteed Availability** flag is set to **true** or **false**.

If the individual membership's start date is later than the respective termination date, this algorithm does the following:

- Updates the status reason of the individual membership. It considers the status reason which is specified in the **Awaiting Membership Cancellation Reason** attribute of the delinquency process preference. Before updating the status reason of the individual membership, the system validates whether the status reason is defined for the **Active** status of the **C1-IndMembership** business object.
- Creates a log entry for each individual membership in the delinquency process

However, if the individual membership's start date is earlier than the respective termination date and if the individual membership's end date is later than the respective termination date, this algorithm does the following:

- Updates the status reason of the individual membership. It considers the status reason which is specified in the **Membership Termination Reason for Delinquency** attribute of the delinquency process preference. Before updating the status reason of the individual membership, the system validates whether the status reason is defined for the **Active** status of the **C1-IndMembership** business object.
- Adds the termination date and termination reason (i.e. status reason) corresponding to the individual membership in the **CI_MEMBERSHIP** table.

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- Sets the individual membership's end date to the termination date corresponding to the individual membership in the **CI_MEMBERSHIP** table.
- Creates a log entry in each individual membership indicating that it is terminated due a delinquency process
- Creates a log entry for each individual membership in the delinquency process
- Stamps the delinquency process ID as a characteristic using the **C1-DELPO** characteristic type on the individual membership

It contains the following parameters:

- **Membership Active Status** - Used to specify the active status code of an individual membership. Here, you must specify the status code which is defined in the lifecycle of the **C1-IndMembership** business object.
- **Skip Termination of Guaranteed Available Memberships(Valid Values-Y,N)** - Used to indicate whether you want to skip the active individual memberships where the **Evaluate Guaranteed Availability** flag is set to **true**. The valid values are **Y** and **N**.

Note:

The system derives the individual memberships using an algorithm which is attached to the **Memberships Derivation** system event of the delinquency process type.

The system considers the delinquency process preference which is specified in the **Delinquency Process Field Mapping** option type of the **DELINPROC** feature configuration.

This algorithm is only applicable for the fully insured individual business.

C1-CRDPTERM

This algorithm is invoked when the status of a delinquency process is changed from **Canceled** to **Initiated**, **Delinquency In Progress**, or **On Hold**. This happens when the payment or adjustment made against the overdue bill, for which the delinquency process is created, is canceled due to any reason.

This algorithm recalculates the trigger date for the delinquency events which are in the **Pending** status. It derives the difference between the delinquency process resume date and delinquency process cancellation date. These extra days are then added to the existing trigger date of the pending delinquency events and thereby the new trigger dates are calculated for the remaining events. If the **Consider Work Days** option is selected in the respective delinquency process type, the system derives the work calendar of the division to which the person or account belongs. The system then checks whether the new trigger date falls on the working (i.e. business) day. If the new trigger date does not fall on the working (i.e. business) day, the system will accordingly add days to the new trigger date to ensure that it falls on the next working day.

Note: This algorithm is applicable for both the fully insured group and fully insured individual businesses.

C1-DLQCCDPS

This algorithm is invoked when the status of a delinquency process is changed to **Customer Terminated**. It creates a customer contact to send a letter (for example, a harsh letter) to the terminated customer to communicate any penalty or legal notice on defaulting or delaying payments.

If the delinquency process is created for a person, this algorithm checks whether the **Notify Group Customer Or Bill Groups Or Bill Accounts** parameter is set to **PG**, **BG**, or **BA**. Depending on the value defined for the **Notify Group Customer Or Bill Groups Or Bill Accounts** parameter, this algorithm does the following:

- If the **Notify Group Customer Or Bill Groups Or Bill Accounts** parameter is set to **PG**, this algorithm checks whether the person type of the person is set to **Parent Customer** or **Bill Group**. If the person type of the person is set to **Parent Customer**, this algorithm creates a customer contact for the parent customer. However, if the person type of the person is set to **Bill Group**, this algorithm derives the parent customer of the bill group (using the **Person**

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Relationship Type option type of the **C1-ASOBLLNG** feature configuration) and then creates a customer contact for the parent customer.

- If the **Notify Group Customer Or Bill Groups Or Bill Accounts** parameter is set to **BG**, this algorithm checks whether the person type of the person is set to **Parent Customer** or **Bill Group**. If the person type of the person is set to **Parent Customer**, this algorithm creates a customer contact for the parent customer and for all those bill groups of the parent customer who are associated with the parent customer using the relationship type which is specified in the **Person Relationship Type** option type of the **C1-ASOBLLNG** feature configuration. However, if the person type of the person is set to **Bill Group**, this algorithm derives the parent customer of the bill group (using the **Person Relationship Type** option type of the **C1-ASOBLLNG** feature configuration) and then creates a customer contact for the parent customer and for the respective bill group.
- If the **Notify Group Customer Or Bill Groups Or Bill Accounts** parameter is set to **BA**, this algorithm checks whether the person type of the person is set to **Parent Customer** or **Bill Group**. If the person type of the person is set to **Parent Customer**, this algorithm creates a customer contact for each account to which the parent customer and its bill groups are associated as the main customer. The system considers those bill groups of the parent customer who are associated with the parent customer using the relationship type which is specified in the **Person Relationship Type** option type of the **C1-ASOBLLNG** feature configuration. However, if the person type of the person is set to **Bill Group**, this algorithm derives the parent customer of the bill group (using the **Person Relationship Type** option type of the **C1-ASOBLLNG** feature configuration) and then creates a customer contact for each account to which the parent customer and the respective bill group are associated as the main customer.

However, if the delinquency process is created for an account, this algorithm checks whether the **Receives Notification** option is selected in the bill routing information of any person associated with the account. If the **Receives Notification** option is selected in the bill routing information of a person, this algorithm creates a customer contact for the person. Note that if the value is specified for the **Account Relationship Type** parameter, this algorithm will consider only those persons who are associated with the account using the given relationship type. In addition, this algorithm does the following:

- Creates a log entry for each customer contact in the delinquency process.
- Stamps the delinquency process ID as a characteristic using the **C1-DELPO** characteristic type on the customer contact.
- Stamps the account ID as a characteristic using the given characteristic type on the customer contact.

Note:

The account ID is stamped as a characteristic on the customer contact only when either of the following condition is met:

The delinquency process is created for a person and the **Notify Group Customer Or Bill Groups Or Bill Accounts** parameter is set to **BA**.

The delinquency process is created for an account.

Once a customer contact is created, a record is added in the **C1_DELIN_PROC_EVT_NOTIF** table where the **DP_EVT_NOTIF_TYPE_FLG** column is set to **CC** and the **DP_EVT_NOTIF_ID** column is set to the customer contact ID.

This algorithm derives the preferred contact method for the customer contact. While deriving the preferred contact method, the algorithm first fetches the main customer's bill route type on the account and then fetches the bill routing method of the bill route type. Once the bill routing method is derived, the system considers the preference which is specified in the **Routing Method - Contact Method Mapping** option type of the **DELINPROC** feature configuration. For more information about the feature configuration, see Setting the DELINPROC Feature Configuration on page 4442. It then checks whether any preferred contact method is mapped to the bill routing method in the preference. If the preferred contact method is mapped to the bill routing method in the preference, the system stamps it on the customer contact. However, if the preferred contact method is not mapped to the bill routing method in the preference, the system considers the default contact method as the preferred contact method and stamps it on the customer contact. This algorithm contains the following parameters:

- **Customer Contact Type** - Used to indicate the customer contact type using which you want to create the customer contact. This parameter is mandatory. Here, you must specify a customer contact type with the appropriate letter template depending on the type of letter you want to send to the customer.

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- **Customer Contact Class** - Used to indicate the customer contact class to which the customer contact type belongs. This parameter is mandatory.
- **Default Contact Method** - Used to indicate the contact method that you want to use when the preferred contact method cannot be derived for the routing method from the preference. This parameter is mandatory.
- **Notify Group Customer Or Bill Groups Or Bill Accounts** - Used to indicate whether a customer contact should be created for a parent customer, bill group, and/or for each billing account (that meets the criteria). The valid values are:
  - **PG** - Used when you want to create a customer contact only for the parent customer.
  - **BG** - Used when you want to create a customer contact for the parent customer and for the bill groups of the parent customer. If the person type of the person is set to **Parent Customer**, the system creates a customer contact for the parent customer and for all those bill groups that are associated with the parent customer using the relationship type specified in the **Person Relationship Type** option type of the **C1-ASOBLLNG** feature configuration. However, if the person type of the person is set to **Bill Group**, the system creates a customer contact for the parent customer and the respective bill group.
  - **BA** - Used when you want to create a customer contact for the main customer of the account. If the person type of the person is set to **Parent Customer**, the system creates a customer contact for each account to which the parent customer and its bill groups are associated as the main customer. However, if the person type of the person is set to **Bill Group**, the system creates a customer contact for each account to which the parent customer and the respective bill group are associated as the main customer.
- **Account Characteristic Type** - Used to indicate the characteristic type using which you want to store the account ID on the customer contact. Here, you must specify a characteristic type where the characteristic entity is set to **Customer Contact**.
- **Account Relationship Type** - Used to indicate the relationship type using which the person is associated with the account. The system will then create the customer contacts only for those persons who are associated with the account using the specified relationship type. This parameter is optional. You can specify maximum ten comma-separated values for this parameter. If you do not specify the parameter value, the system will create customer contacts for all the persons who are associated with the account irrespective of their relationship type. Note that this parameter is only applicable for the fully insured individual business. Note that this parameter is only applicable for the fully insured group business.

Note: This algorithm is applicable for both the fully insured group and fully insured individual businesses.

C1-CHKREIRUL

This algorithm is applicable for both Fully Insured Group and Individual line of business and attached on the 'Reinstate' status.

Checks the Allow Automatic Reinstatement and the Maximum Automatic Reinstatement Count configurations set on the Delinquency Process Type, if the Delinquency Process's Automatic Reinstatement Count > Maximum Automatic Reinstatement Count, or if the automatic reinstatement is not allowed, the algorithm creates a To Do Entry.

It also checks for the Reinstatement Threshold (Paid amount percentage should be greater than or equal to the threshold for automatic reinstatement), the Days Since Termination automatic reinstatement is allowed only if is happening within the specified number of days since the termination effective date) and the termination reason.

If Automatic Reinstatement is not possible, then the Delinquency Process will be in 'Automatic Reinstatement Stopped'.

C1-EVALCUSST

This algorithm attached on the 'Reinstate' status of delinquency process business object will evaluate the status of the policies that were terminated via the Delinquency Process and decides whether the process is to be transitioned to the Request Reinstatement status or Customer Reinstated status.

This will work for fully insured groups.

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C1-TRPOLPREI

This algorithm is configured on the 'Pending Reinstatement' status on the Delinquency Process Business Object.

It transitions terminated policies of the customer to the pending reinstatement status.

It is applicable only for Fully Insured Group line of business.

C1-UPDDLQRC

This algorithm is configured on the 'Customer Reinstated' status on the Delinquency Process Business Object.

It updates the automatic reinstatement count on the Delinquency Process. It also clears the Reinstatement Trigger Date on the Delinquency Process.

It is applicable for both Fully Insured Group and Individual line of business.

Algorithm Types for Payment Cancellation System Event

Following algorithm types are available for the **Payment Cancellation** system event.

Algorithm Type	Description	Detailed Description
C1-BNDPYCNCL	Binder Payment Cancellation Check Handler Algorithm	This algorithm checks whether the cancelled payment is binder payment or not by verifying the payment characteristics. For more information, see To Do Notification on Binder Payment Cancellation on page 413
C1-CDPPAYCAN	Continue Delinquency Process due to Cancelled Payments	This algorithm resumes the cancelled delinquency processes during the payment cancellations. For more information, see Resuming a Delinquency Process on Payment Cancellation on page 4171
C1-NOTADCAN	Notify Customer on Advance Deposit Cancelation	This algorithm creates a customer contact when an advance deposit payment is cancelled. For more information, see Notification on Advance Deposit Cancellation on page 4195
C1-PXPTDCAL	Paid Through Date Calculation for Payment Cancellation	This algorithm will be responsible for calculating and stamping paid through date in Policy and Membership tables based on parameter specified. For more information, see Policy on page 247
C1-RODPDUEPX	Reopen Delinquency Process due to Cancelled Payments	This algorithm checks for any Delinquency Process related to the FTs matched to the cancelled Payment. For more information, see Resuming a Delinquency Process on Payment Cancellation on page 4171
C1-VALMRPYCN	Validate Member Reconciliation Payment Cancellation	This algorithm transits reconciliation status which is in open/complete status to the pending cancellation status if related tender is cancelled. For more information, see Reconciliation of Individual Health Insurance Subsidy Payments on page 2774

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Algorithm Type	Description	Detailed Description
PYCN-EMPTY	An empty sample algorithm for payment cancellation	This is a payment cancellation algorithm, however it does not perform any logic. It exists simply as a sample algorithm available to implementers to use as a base for creating an actual payment cancellation algorithm.

Delinquency Control (Screen)

You need to define a delinquency control for each collection class where the collection method is set to **Self-Control Delinquency**. A new maintenance object named **C1-DELIN-CTR**, a new business object named **C1-DelinControl**, and a new screen named **Delinquency Control** are introduced in this release.

The **Delinquency Control** screen enables you to create, edit, and delete a delinquency control. Note that this screen enables you to define a delinquency control only for those collection classes where the collection method is set to **Self-Control Delinquency**.

A delinquency control enables the system to determine the following:

- A minimum credit review frequency at which the persons or accounts belonging to the respective collection class should be monitored for delinquency. In other words, it indicates in how many days the system should review whether the bills of the persons or accounts are overdue.
- A delinquency monitor rule algorithm that you want to invoke for the collection class while executing the **C1-PRDLQ** or **C1-ACDLQ** batch.

The **Delinquency Control** screen contains the following zones:

- Delinquency Control List on page 4207
- Delinquency Control on page 4208

Delinquency Control List

The **Delinquency Control List** zone lists the delinquency controls that are already defined in the system. It contains the following columns:

Column Name	Column Description
Collection Class	Indicates the collection class associated with the delinquency control.
	Note: You can create only one delinquency control for every collection class in the system. You need to set the collection method as **Self-Control Delinquency** in the collection class while associating the collection class with the delinquency control.
Minimum Credit Review Frequency (Days)	Displays the minimum number of days after which the credit review process should be conducted.
	Note: Based on the specified frequency, the system executes the credit review process in a repetitive manner.
Edit Delinquency Control	On clicking the **Edit** (✎) icon, the **Delinquency Control** screen appears where you can edit the details of the delinquency control.

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Column Name	Column Description
Delete Delinquency Control	On clicking the **Delete** (🗑) icon, you can delete the delinquency control.
	Note: You can delete a delinquency control when the associated collection class is not referred in a delinquency process.

On clicking the **Broadcast** (📡) icon corresponding to a delinquency control, the **Delinquency Control** zone appears with the details of the respective delinquency control.

Pagination is used to display limited number of records in the **Search Results** section. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

You can filter the list using **Status** available in the **Filter** area. By default, the **Filter** area is hidden. You can view the **Filter** area by clicking the **Filters** (▽) icon in the upper right corner of this zone.

Delinquency Control

The **Delinquency Control** zone displays the details of the delinquency control. It contains the following sections:

- **Main** - Displays basic information about the delinquency control. It contains the following fields:

Field Name	Field Description
Collection Class	Indicates the collection class associated with the delinquency control.
	Note: It has a link. On clicking the link, the **Collection Class** screen appears where you can view the details of the respective collection class. You can create only one delinquency control for every collection class in the system. You need to set the collection method as **Self-Control Delinquency** in the collection class while associating the collection class with the delinquency control.
Minimum Credit Review Frequency (Days)	Displays the minimum number of days after which the credit review process should be conducted.
	Note: Based on the specified frequency, the system executes the credit review process in a repetitive manner.
Status	Indicates the status of the delinquency control. The valid values are: • Active • Inactive

- **Record Actions** - This section contains the following buttons:

Button Name	Button Description
Edit	Used to edit the details of the delinquency control.
Delete	Used to delete the delinquency control.

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Button Name	Button Description
	Note: You can delete a delinquency control when the associated collection class is not referred in a delinquency process.

- **Algorithms** - This section lists the algorithms defined for the delinquency control. It contains the following columns:

Column Name	Column Description
Sequence	Indicates the order in which the algorithms with the same system event must be triggered.

System Event	Indicates the system event when the algorithm must be triggered. The valid value is:
	• **Delinquency Monitor Rule** - Used when you want to trigger the attached algorithm while executing the following batches:
	  • **Account Level Delinquency Monitor (C1-ACDLQ)** batch
	  • **Person Level Delinquency Monitor (C1-PRDLQ)** batch

Algorithm	Indicates the algorithm attached to the system event.
	Note: It has a link. On clicking the link, the **Algorithm** screen appears where you can view the details of the respective algorithm.

- **Record Information** - This section contains the following field:

Field Name	Field Description
Business Object	Indicates the business object using which the delinquency control is created. In addition, a context menu appears corresponding to this field which helps in navigating to other screens in the application.
	Note: It has a link. On clicking the link, the **Business Object** screen appears where you can view the details of the respective business object.

By default, the **Delinquency Control** zone does not appear in the **Delinquency Control** screen. It appears when you click the **Broadcast** (📡) icon corresponding to a delinquency control in the **Delinquency Control List** zone.

Defining a Delinquency Control

Prerequisites

To define a delinquency control, you should have:

- Delinquency control business object defined in the application.
- Collection class defined where the collection method set to **Self-Control Delinquency**.

Procedure

To define a delinquency control:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **D** and then click **Delinquency Control**.
   A sub-menu appears.
3. Click the **Add** option from the **Delinquency Control** sub-menu.

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The **Delinquency Control** screen appears. It contains the following sections:

- **Main** - Used to specify basic details about the delinquency control.
- **Algorithms** - Used to associate an algorithm with the delinquency control.

The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Collection Class	Used to indicate the collection class which is associated with the delinquency control. **Note:** This list displays only those options where the collection method is set as **Self-Control Delinquency**.	Yes
Business Object	Indicates the business object using which you are defining the delinquency control.	Not applicable
Minimum Credit Review Frequency (Days)	Used to indicate a minimum credit review frequency at which the persons or accounts belonging to the respective collection class should be monitored for delinquency. In other words, it indicates in how many days the system should review whether the bills of the persons or accounts are overdue.	No
Status	Used to indicate the status of the delinquency control. The valid value is: • Active • Inactive	Yes

4. Enter the required details in the **Main** section.
5. Associate the required algorithms with the delinquency control.
6. Click **Save**.
   The delinquency control is defined.

Related Topics

For more information on...	See...
Delinquency Control screen	Delinquency Control (Screen) on page 4207
How to associate an algorithm with a delinquency control	Associating an Algorithm with a Delinquency Control on page 4210

Associating an Algorithm with a Delinquency Control

Prerequisites

To associate an algorithm with a delinquency control, you should have:

- Algorithm and Algorithm Type defined in the application.
- System event defined in the application.

Procedure

To associate an algorithm with a delinquency control:

1. Ensure that the **Algorithms** section is expanded when you are defining *or* editing the delinquency control.

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The **Algorithms** section contains the following columns in a grid:

Column Name	Column Description	Mandatory (Yes or No)
System Event	Used to indicate the system event when you want to execute the algorithm. The valid values are: • **Delinquency Monitor Rule** - Used to attach an algorithm that you want to invoke for the collection class while executing the **C1-PRDLQ** or **C1-ACDLQ** batch. **Note:** The **C1-DLNQMNRL** algorithm type is shipped with the product. You must attach an algorithm created using the **C1-DLNQMNRL** algorithm type to the **Delinquency Monitor Rule** system event defined for the delinquency control. For more information see, Algorithm Used in Delinquency Control on page 4196	Yes (Conditional) **Note:** This field is required while associating an algorithm with the delinquency control.
Sequence	Used to specify the order in which the algorithms for each system event must be executed.	Yes (Conditional) **Note:** This field is required while associating an algorithm with the delinquency control.
Algorithm	Used to specify the algorithm. **Note:** If you select the system event option, the **Search** (🔍) icon appears corresponding to the **Algorithm** field. On clicking the **Search** (🔍) icon, the **Algorithm Search** window appears. On specifying the algorithm, the description of the algorithm appears corresponding to the **Algorithm** field.	Yes (Conditional) **Note:** This field is required while associating an algorithm with the delinquency control.

2. If you want to associate more than one algorithm with the delinquency control, click the **Add** (+) icon and then repeat step 2.

Note: However, if you want to disassociate an algorithm from the delinquency control, click the **Delete** (🗑) icon corresponding to the algorithm.

3. Click **Save**.
The algorithms are associated with the delinquency control.

Editing a Delinquency Control

Prerequisites

To edit a delinquency control, you should have:

- Delinquency control business object defined in the application.
- Collection class defined where the collection method set to **Self-Control Delinquency**.

Procedure

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To edit a delinquency control:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **D** and then click **Delinquency Control**.
   A sub-menu appears.
3. Click the **Search** option from the **Delinquency Control** sub-menu.
   The **Delinquency Control** screen appears.
4. In the **Delinquency Control List** zone, click the **Edit** (✎) icon in the **Edit Delinquency Control** column corresponding to the *d*elinquency control whose details you want to edit.

   The **Delinquency Control** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details about the delinquency control.
   - **Algorithms** - Used to associate an algorithm with the delinquency control.

   The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Collection Class	Indicates the collection class which is associated with the delinquency control.	Not applicable
Business Object	Indicates the business object using which you are defining the delinquency control.	Not applicable
Minimum Credit Review Frequency (Days)	Used to indicate a minimum credit review frequency at which the persons or accounts belonging to the respective collection class should be monitored for delinquency. In other words, it indicates in how many days the system should review whether the bills of the persons or accounts are overdue.	No
Status	Used to indicate the status of the delinquency control. The valid value is: • Active • Inactive	Yes

5. Modify the details in the **Main** section, if required.
6. Associate the required algorithms with the delinquency control.
7. Click **Save**.
   The changes made to the delinquency control are saved.

Related Topics

For more information on...	See...
Delinquency Control screen	Delinquency Control (Screen) on page 4207
Delinquency Control List zone	Delinquency Control List on page 4207
Delinquency Control zone	Delinquency Control on page 4208
How to associate an algorithm with the delinquency control	Associating an Algorithm with a Delinquency Control on page 4210

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Deleting a Delinquency Control

Procedure

To delete a delinquency control:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **D** and then click **Delinquency Control**.
   A sub-menu appears.
3. Click the **Search** option from the **Delinquency Control** sub-menu
   The **Delinquency Control** screen appears.
4. In the **Delinquency Control** zone, click the **Delete** (🗑) icon in the **Delete** column corresponding to the *d*elinquency control that you want to delete.

   A message appears confirming whether you want to delete the delinquency control.

   Note: You can delete a delinquency control when the associated collection class is not referred in a delinquency process.

   Tip: Alternatively, you can delete a delinquency control by clicking the **Delete** button in the **Delinquency Control List** zone.
5. Click **OK**.
   The delinquency control is deleted.

Related Topics

For more information on...	See...
Delinquency Control screen	Delinquency Control (Screen) on page 4207
Delinquency Control List zone	Delinquency Control List on page 4207
Delinquency Control zone	Delinquency Control on page 4208

Viewing the Delinquency Control Details

Procedure

To view the details of the delinquency control:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **D** and then click **Delinquency Control**.
   A sub-menu appears.
3. Click the **Search** option from the **Delinquency Control** sub-menu.
   The **Delinquency Control** screen appears.
4. In the **Delinquency Control** zone, click the **Broadcast** (📡) icon corresponding to the delinquency control *w*hose details you want to view.
   The **Delinquency Control** zone appears.
5. View the details of the delinquency control in the **Delinquency Control** zone.

Related Topics

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For more information on...	See...
Delinquency Control screen	Delinquency Control (Screen) on page 4207
Delinquency Control List zone	Delinquency Control List on page 4207
Delinquency Control zone	Delinquency Control on page 4208

Delinquency Event Type (Screen)

The Delinquency event type screen allows you to define, edit, copy, and delete a delinquency event type. It contains the following zones:

- Delinquency Event Type List on page 4214
- Delinquency Event Type on page 4214

Delinquency Event Type List

The **Delinquency Event Type List** zone lists the delinquency event types that are already defined in the system. It contains the following columns:

Column Name	Column Description
Delinquency Event Type	Displays the delinquency event type.
Description	Displays the description of the delinquency event type.
Edit	On clicking the **Edit** (✎) icon, the **Delinquency Event Type** screen appears where you can edit the details of the delinquency event type.
Duplicate	On clicking the **Duplicate** (⧉) icon, the **Delinquency Event Type** screen appears where you can define a new delinquency event type using an existing delinquency event type.
Delete	On clicking the **Delete** (🗑) icon, you can delete the delinquency event type.
	Note: You can delete a delinquency event type when a delinquency process is not created using the delinquency event type.

On clicking the **Broadcast** (📡) icon corresponding to a delinquency event type, the **Delinquency Event Type** zone appears with the details of the respective delinquency event type.

Pagination is used to display limited number of records in the **Search Results** section. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

Delinquency Event Type

The **Delinquency Event Type** zone displays the details of the delinquency event type. It contains the following sections:

- **Main** - Displays basic information about the delinquency event type. It contains the following fields:

Field Name	Field Description
Delinquency Event Type	Displays the delinquency event type.
Customer Contact Event	Indicates the event created for customer contact.

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Field Name	Field Description
Description	Displays the description of the delinquency event type.
Detailed Description	Displays additional information about the delinquency event type.

- **Record Actions** - This section contains the following buttons:

Button Name	Button Description
Edit	Used to edit the details of the delinquency event type.
Delete	Used to delete the delinquency event type. **Note:** You can delete a delinquency event type when a delinquency process is not created using the delinquency event type.
Duplicate	Used to create a new delinquency event type using an existing delinquency event type.

- **Algorithms** - This section lists the algorithms defined for the delinquency event type. It contains the following columns:

Column Name	Column Description
Sequence	Indicates the order in which the algorithms with the same system event must be triggered.

System Event	Indicates the system event when the algorithm must be triggered. The valid values are:
	• **Event Activation** - Used to configure the following algorithms:
	  • **C1-DLQCRTODO** - Used to create a To Do for the main customer of the account when the delinquency event is triggered. This algorithm is invoked in the **C1-DPMON** batch.
	  Note: The **C1-DLQCRTODO** algorithm type and algorithm are shipped with the product. You need to attach this algorithm to the **Event Activation** system event. For more information about the algorithm, refer to C1-DLQCRTODO on page 4089
	  • **C1-DETTERMDT** - Used to calculate the termination effective date for the main customer of the account when the delinquency event is triggered. This algorithm is invoked in the **C1-DPMON** batch.
	  Note: The **C1-DETTERMDT** algorithm type and algorithm are shipped with the product. You need to attach this algorithm to the **Event Activation** system event. For more information about the algorithm, refer to C1-DETTERMDT on page 4092
	  • **C1-DLQSENDCC** - Used to the create customer contacts for all the persons who are associated with the account that is configured to receive the notification when the delinquency event is triggered. This algorithm is invoked in the **C1-DPMON** batch.
	  Note: The **C1-DLQSENDCC** algorithm type and algorithm are shipped with the product. You need to attach this algorithm to the **Event Activation** system event. For more information about the algorithm, refer to C1-DLQSENDCC on page 4089
	• **Monitor Completed Event** - Used to configure the following algorithms:
	  • **C1-RCLTRGDMD** - Used to retrieve the customer contact created for the event and recalculates the trigger date of the pending events in the delinquency process

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Column Name	Column Description
	based on the document mail date when the delinquency event is triggered. This algorithm is invoked in the **C1-DPMON** batch. **Note:** The **C1-RCLTRGDMD** algorithm type and algorithm are shipped with the product. You need to attach this algorithm to the **Monitor Completed Event** system event. For more information about the algorithm, refer to C1-RCLTRGDMD on page 4097 • **C1-TRNTERTRG** - Used to evaluate the termination trigger date configurations and decide the subsequent status of the delinquency process when the delinquency event is triggered. This algorithm is invoked in the **C1-DPMON** batch. **Note:** The **C1-TRNTERTRG** algorithm type and algorithm are shipped with the product. You need to attach this algorithm to the **Monitor Completed Event** system event. For more information about the algorithm, refer to C1-TRNTERTRG on page 4097
Algorithm	Indicates the algorithm attached to the system event. **Note:** It has a link. On clicking the link, the **Algorithm** screen appears where you can view the details of the respective algorithm.

- **Record Information** - This section contains the following field:

Field Name	Field Description
Business Object	Indicates the business object using which the delinquency event type is created. In addition, a context menu appears corresponding to this field which helps in navigating to other screens in the application. **Note:** It has a link. On clicking the link, the **Business Object** screen appears where you can view the details of the respective business object.

By default, the **Delinquency Event Type** zone does not appear in the **Delinquency Event Type** screen. It appears when you click the **Broadcast** (📡) icon corresponding to a delinquency event type in the **Delinquency Event Type List** zone.

Defining a Delinquency Event Type

Prerequisites

To define a delinquency event type, you should have:

- Delinquency event type business objects defined in the application

Procedure

To define a delinquency event type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **D** and then click **Delinquency Process Type**.
   A sub-menu appears.
3. Click the **Add** option from the **Delinquency Event Type** sub-menu.

   The **Delinquency Event Type** screen appears. It contains the following sections:

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- **Main** - Used to specify basic details about the delinquency event type.
- **Algorithms** - Used to associate an algorithm with the delinquency event type.

The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Delinquency Event Type	Displays the delinquency event type.	Not applicable
Business Object	Indicates the business object using which you are defining the delinquency event type.	Not applicable
Customer Contact Event		No
Description	Used to specify the description for the delinquency event type.	Yes
Detailed Description	Used to specify additional information about the delinquency event type.	No

4. Enter the required details in the **Main** section.
5. Associate an algorithm with a delinquency event type, if required.
6. Click **Save**.
   The delinquency event type is defined.

Related Topics

For more information on...	See...
Delinquency Event Type screen	Delinquency Event Type (Screen) on page 4214
How to associate an algorithm with a delinquency event type	Associating an Algorithm with a Delinquency Event Type on page 4217

Associating an Algorithm with a Delinquency Event Type

Prerequisites

To associate an algorithm with a delinquency event type, you should have:

- Algorithm and algorithm type defined in the application.
- Values defined for the **DELIN_EVT_TYPE_SEVT_FLG** lookup field.

Procedure

To associate an algorithm with a delinquency event type:

1. Ensure that the **Algorithms** section is expanded when you are defining *or* editing the delinquency event type.

   The **Algorithms** section contains the following columns in a grid:

Column Name	Column Description	Mandatory (Yes or No)
System Event	Used to indicate the system event when you want to execute the algorithm. The valid values are: • **Event Activation**	Yes (Conditional)

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<table>
<tr><th>Column Name</th><th>Column Description</th><th>Mandatory (Yes or No)</th></tr>
<tr><td></td><td>
Monitor Completed Event
Note:
The above system events are used when you want to trigger the attached algorithm while executing the Delinquency Process Monitor (C1-DPMON) batch.
The Event Activation system event is invoked on the trigger date to perform the actions related to those events which are in the Pending status. Once all the actions are executed, the event status is changed from Pending to Completed.
The Monitor Completed Event system event is invoked on those events which are in the Completed status, to determine whether the delinquency process can proceed to the next subsequent event.
The following table lists the algorithms which must be attached to the above system events:
<table>
<tr><th>System Event</th><th>Algorithm</th><th>Description</th></tr>
<tr><td>Event Activation</td><td>C1-DLQCRTODO</td><td>Refer to C1-DLQCRTODO on page 4089</td></tr>
<tr><td>Event Activation</td><td>C1-DETTERMDT</td><td>Refer to C1-DETTERMDT on page 4092</td></tr>
<tr><td>Event Activation</td><td>C1-DLQSENDCC</td><td>Refer to C1-DLQSENDCC on page 4089</td></tr>
<tr><td>Monitor Completed Event</td><td>C1-RCLTRGDMD</td><td>Refer to C1-RCLTRGDMD on page 4097</td></tr>
<tr><td>Monitor Completed Event</td><td>C1-TRNTERTRG</td><td>Refer to C1-TRNTERTRG on page 4097</td></tr>
</table>
</td><td>Note: This field is required while associating an algorithm with the delinquency event type.</td></tr>
<tr><td>Sequence</td><td>Used to specify the order in which the algorithms for each system event must be executed.</td><td>Yes (Conditional)
Note: This field is required while associating an algorithm with the delinquency event type.</td></tr>
<tr><td>Algorithm</td><td>Used to specify the algorithm.</td><td>Yes (Conditional)</td></tr>
</table>

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Column Name	Column Description	Mandatory (Yes or No)
	Note: If you select the system event option, the **Search** (🔍) icon appears corresponding to the **Algorithm** field. On clicking the **Search** (🔍) icon, the **Algorithm Search** window appears. On specifying the algorithm, the description of the algorithm appears corresponding to the **Algorithm** field.	**Note:** This field is required while associating an algorithm with the delinquency event type.

2. If you want to associate more than one algorithm with the delinquency process type, click the **Add** (+) icon and then repeat step 2.

Note: However, if you want to disassociate an algorithm from the delinquency process type, click the **Delete** (🗑) icon corresponding to the algorithm.

3. Click **Save**.
The algorithms are associated with the delinquency event type.

Editing a Delinquency Event Type

Prerequisites

To edit a delinquency event type, you should have:

- Delinquency event type business objects defined in the application

Procedure

To edit a delinquency event type:

1. Click the **Admin** link in the **Application** toolbar.
A list appears.
2. From the **Admin** menu, select **D** and then click **Delinquency Process Type**.
A sub-menu appears.
3. Click the **Search** option from the **Delinquency Event Type** sub-menu.
The **Delinquency Event Type** screen appears.
4. In the **Delinquency Event Type** zone, click the **Edit** (✎) icon in the **Edit** column corresponding to the *d*elinquency event type whose details you want to edit.

   The **Delinquency Event Type** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details about the delinquency event type.
   - **Algorithms** - Used to associate an algorithm with the delinquency event type.

   The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Delinquency Event Type	Used to specify the delinquency event type.	Yes
Business Object	Indicates the business object using which you are defining the delinquency event type.	Not applicable
Customer Contact Event		No
Description	Used to specify the description for the delinquency event type.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
Detailed Description	Used to specify additional information about the delinquency event type.	No

Tip: Alternatively, you can edit a delinquency event type by clicking the **Edit** button in the **Delinquency Event Type** zone.

5. Enter the required details in the **Main** section.
6. Associate the required algorithms with a delinquency event type.
7. Click **Save**.
   The changes made to the delinquency event type are saved.

Related Topics

For more information on...	See...
Delinquency Event Type screen	Delinquency Event Type (Screen) on page 4214
Delinquency Event Type List zone	Delinquency Event Type List on page 4214
Delinquency Event Type zone	Delinquency Event Type on page 4214
How to associate an algorithm with the delinquency event type	Associating an Algorithm with a Delinquency Event Type on page 4217

Copying a Delinquency Event Type

Instead of creating a delinquency event type from scratch, you can create a new delinquency event type using an existing delinquency event type. This is possible through copying a delinquency event type. On copying a delinquency event type, the details including the algorithms are copied to the new delinquency event type. You can then edit the details, if required.

Prerequisites

To copy a delinquency event type, you should have:

- Delinquency event type business objects defined in the application

Procedure

To copy a delinquency event type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **D** and then click **Delinquency Event Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Delinquency Event Type** sub-menu.
   The **Delinquency Event Type** screen appears.
4. In the **Delinquency Event Type List** zone, click the **Duplicate** (⧉) icon in the **Duplicate** column corresponding to the delinquency event type whose copy you want to create.

   The **Delinquency Event Type** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details about the delinquency event type.
   - **Algorithms** - Used to associate an algorithm with the delinquency event type.

   The **Main** section contains the following fields:

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Field Name	Field Description	Mandatory (Yes or No)
Delinquency Event Type	Used to specify the delinquency event type.	Yes
Business Object	Indicates the business object using which you are defining the delinquency event type.	Not applicable
Customer Contact Event		No
Description	Used to specify the description for the delinquency event type.	Yes
Detailed Description	Used to specify additional information about the delinquency event type.	No

Tip: Alternatively, you can copy a delinquency event type by clicking the **Duplicate** button in the **Delinquency Event Type** zone.

5. Enter the required details in the **Main** section.
6. Associate the required algorithm with a delinquency event type.
7. Click **Save**.
   The new delinquency event type is defined.

Related Topics

For more information on...	See...
Delinquency Event Type screen	Delinquency Event Type (Screen) on page 4214
Delinquency Event Type List zone	Delinquency Event Type List on page 4214
Delinquency Event Type zone	Delinquency Event Type on page 4214
How to associate an algorithm with the delinquency event type	Associating an Algorithm with a Delinquency Event Type on page 4217

Deleting a Delinquency Event Type

Procedure

To delete a delinquency event type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **D** and then click **Delinquency Event Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Delinquency Event Type** sub-menu
   The **Delinquency Event Type** screen appears.
4. In the **Delinquency Event Type List** zone, click the **Delete** (🗑) icon in the **Delete** column corresponding to the *d*elinquency event type that you want to delete.

   A message appears confirming whether you want to delete the delinquency event type.

Note: You can delete a delinquency event type when the delinquency event type is not associated with a delinquency process type.

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> **Tip:** Alternatively, you can delete a delinquency event type by clicking the **Delete** button in the **Delinquency Event Type List** zone.

5. Click **OK**.
   The delinquency event type is deleted.

Related Topics

For more information on...	See...
Delinquency Event Type screen	Delinquency Event Type (Screen) on page 4214
Delinquency Event Type List zone	Delinquency Event Type List on page 4214
Delinquency Event Type zone	Delinquency Event Type on page 4214

Viewing the Delinquency Event Type Details

Procedure

To view the details of the delinquency event type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **D** and then click **Delinquency Event Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Delinquency Event Type** sub-menu.
   The **Delinquency Event Type** screen appears.
4. In the **Delinquency Event Type List** zone, click the **Broadcast** (ᯤ) icon corresponding to the delinquency event type *w*hose details you want to view.
   The **Delinquency Event Type** zone appears.
5. View the details of the delinquency event type in the **Delinquency Event Type** zone.

Related Topics

For more information on...	See...
Delinquency Event Type screen	Delinquency Event Type (Screen) on page 4214
Delinquency Event Type List zone	Delinquency Event Type List on page 4214
Delinquency Event Type zone	Delinquency Event Type on page 4214

Delinquency Process Type (Screen)

Oracle Revenue Management and Billing allows you to define a delinquency process type using which you can create a delinquency process. It is the delinquency process type which helps the system to determine the following:

- The delinquency entity type which decides whether the delinquency process type is applicable for a person level or an account level delinquency.
- The collection object which defines the type of object managed by the delinquency process.
- The delinquency event trigger modes, such as **Manual**, **Automatic**, and **Manual or Automatic** are configured in the system. For more information, see Defining a Delinquency Process Type on page 4234
- The delinquency event trigger date calculation rules which are configured for the delinquency process using the delinquency process type. For more information, see Defining a Delinquency Process Type on page 4234

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- The business object using which the delinquency process should be created in the system.
- The consider work days that verify the calculated trigger date in the system.
- The grace period configured for an individual membership. For more information, see Configuring the Grace Period for a Delinquency Process Type on page 4243
- Whether the trigger date recalculation is configured for the delinquency process that is kept on hold and resumed later for some reason. For more information, see Configuring the Trigger Date Recalculation Method in a Delinquency Process Type on page 4249
- The algorithms defined for the delinquency process. For more information, see Associating an Algorithm with a Delinquency Process Type on page 4241
- The delinquency process type events configured for the delinquency process. For more information, see Configuring an Event for a Delinquency Process Type on page 4237
- Whether an automatic termination is configured for the delinquency process. For more information, see Configuring the Automatic Termination and Reinstatement Process in a Delinquency Process Type on page 4245

> **Note:** You can only configure the automatic termination (in a delinquency process type) for an individual membership.

- Whether an approval is configured for manual actions taken on the delinquency process. For more information, see Configuring the Approval Process in a Delinquency Process Type on page 4251
- Whether the termination date rule priority is configured for the delinquency process. For more information, see Setting the Termination Date Rules in a Delinquency Process Type on page 4248
- Whether a characteristic is defined for a delinquency process. For more information, see Defining a Characteristic for a Delinquency Process Type on page 4252

This screen consists of the following zones:

- Delinquency Process Type List on page 4223
- Delinquency Process Type on page 4224

Delinquency Process Type List

The **Delinquency Process Type List** zone lists the delinquency process types that are already defined in the system. It contains the following columns:

Column Name	Column Description
Delinquency Process Type	Displays the delinquency process type.
Description	Displays the description of the delinquency process type.
Delinquency Entity Type	Indicates the type of entity created for delinquency. The valid values are: • Account • Person **Note:** At present, only the **Account** entity is applicable for an individual delinquency.
Status	Indicates the status of the delinquency process type. The valid values are: • Active • Inactive
Edit	On clicking the **Edit** (✎) icon, the **Delinquency Process Type** screen appears where you can edit the details of the delinquency process type.
Delete	On clicking the **Delete** (🗑) icon, you can delete the delinquency process type.

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Column Name	Column Description
	Note: You can delete a delinquency process type when a delinquency process is not created using the delinquency process type.

On clicking the **Broadcast** (📡) icon corresponding to a delinquency process type, the **Delinquency Process Type** zone appears with the details of the respective delinquency process type.

Pagination is used to display limited number of records in the **Search Results** section. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

You can filter the list using various search criteria (such as, **Delinquency Entity Type**, **Description**, and **Status**) available in the **Filter** area. By default, the **Filter** area is hidden. You can view the **Filter** area by clicking the **Filters** (▽) icon in the upper right corner of this zone.

Delinquency Process Type

The **Delinquency Process Type** zone displays the details of the delinquency process type. It contains the following sections:

- **Main** - Displays basic information about the delinquency process type. It contains the following fields:

Field Name	Field Description
Delinquency Process Type	Displays the delinquency process type.
Delinquency Entity Type	Displays the entity type for which the delinquency process type is created.
Delinquency Process Business Object	Indicates the business object using which the delinquency process should be created. In addition, a context menu appears corresponding to this field which helps in navigating to other screens in the application. **Note:** It has a link. On clicking the link, the **Business Object** screen appears where you can view the details of the respective business object.
Description	Displays the description of the delinquency process type.
Detailed Description	Displays additional information about the delinquency process type.
Status	Indicates the status of the delinquency process type. The valid values are: • Active • Inactive
Collection Object	Indicates the entity on which the collection should take place in the delinquency process. **Note:** At present, the system supports **Bill** as the collection entity.
Automatic Termination and Reinstatement Required	Indicates whether the automatic termination and reinstatement is required or not for the delinquency process. **Note:** At present, automatic reinstatement is not applicable for individual delinquency.
Delinquency Event Trigger Mode	Indicates the mode in which the delinquency event must be triggered. The valid values are: • Automatic

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Field Name	Field Description
	• Manual • Manual or Automatic
Trigger Date Calculation Mode	Indicates the mode in which the date calculation must be triggered. The valid values are: • Latest Bill Due Date with Grace Period • Usage Basis
Wait Period	Indicates the specific period considered for calculating the trigger dates for the events on the delinquency process. The valid values are: • Monthly Cyclic • Wait Days
Usage Basis	Indicates the option based on which the date calculation must be take place. The valid values are: • Delinquency Process Creation Date • Grace Start Date • Latest Bill Date • Latest Bill Due Date
Consider Work Days	Indicates whether you want to consider work days for the trigger dates of the events on the delinquency process.

- **Record Actions** - This section contains the following buttons:

Button Name	Button Description
Edit	Used to edit the details of the delinquency process type.
Delete	Used to delete the delinquency process type.
	Note: You can delete a delinquency process type. when the delinquency process type is not created using the delinquency process type.
Duplicate	Used to create a new delinquency process type using an existing delinquency process type.

- **Record Information** - This section contains the following field:

Field Name	Field Description
Business Object	Indicates the business object using which the delinquency process type is created. In addition, a context menu appears corresponding to this field which helps in navigating to other screens in the application.
	Note: It has a link. On clicking the link, the **Business Object** screen appears where you can view the details of the respective business object.

- **Characteristics** - This section lists the characteristics of the delinquency process type. It contains the following columns:

Column Name	Column Description
Characteristic Type	Indicates the characteristic type.
Characteristic Value	Displays the value of the characteristic type.

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- **Delinquency Process Event Types** - This section lists the event types defined for the delinquency process type. It contains the following columns:

Column Name	Column Description
Sequence	Indicates the sequence of the field attribute.
Delinquency Event Type	Indicates the delinquency event type. **Note:** It has a link. On clicking the link, the **Delinquency Event Type** screen appears where you can view the details of the respective delinquency event type

Trigger Period	Indicates the period when you want to trigger the event using the delinquency event type. The valid values are:
	• After Grace End Date
	• Before Grace End Date
	Note:
	The system calculates the trigger date based on the trigger period. If you select the **After Grace End Date** option, the system calculates the trigger date using the following formula:
	`Trigger Date = Grace End Date + Wait Days`
	If you select the **Before Grace End Date** option, the system calculates the trigger date using the following formula:
	`Trigger Date = Grace End Date -- Wait Days`

Wait Period Source	Indicates the source from where the wait period is received. The valid values are: • Algorithm • Delinquency Process Type **Note:** You need to configure the **Derive Wait Period Details based on Business Rules (C1-DERWDBR)** algorithm in the delinquency process type, if you select the **Algorithm** option from the **Wait Period Source** field.
Wait Days	Displays the wait period (in days) after which the delinquency event is triggered. **Note:** Data in this column appears only if you have selected the **Wait Days** option from the **Wait Period** field.
Wait Months	Displays the wait period (in months) after which the delinquency event is triggered. **Note:** Data in this column appears only if you have selected the **Monthly Cyclic** option from the **Wait Period** field.
Day of Month	Indicates the particular day of the month after which the delinquency event is triggered. **Note:** Data in this column appears only if you have selected the **Monthly Cyclic** option from the **Wait Period** field.

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Column Name	Column Description
Move Past Dated Event To Future	Indicates whether you want to move the past dated event to a future date.
Defer to Next Cycle	Indicates whether you want to move the delinquency event to the next billing cycle.
Preview Required	Indicates whether an delinquency event requires a preview before it is actually triggered.
Preview Days	Displays the preview period (in days) prior to which the delinquency event is triggered for preview. **Note:** The system calculates the preview date based on preview days. The preview date is calculated using the following formula: `Preview Date = Trigger Date -- Preview Days`
Skip Past Event	Indicates whether you want to skip any event if the calculated trigger date for the event is past dated.

Eligibility Rule Type	Indicates the rule type eligibility for the delinquency process type.
	
	Note:
	
	To define the rule type eligibility, you need to do the following:
	• Define the required parameters using the following source entities:
	  • Account
	  • Health Plan
	  • Health Product
	  • Person
	  and set the parameter usage to **Rule Eligibility Criteria**.
	• Define a rule type where the rule type usage is set to **Delinquency Process Event Eligibility**.
	• Define a rule using the rule type with a parameter configured using the above source entities.
	
	For example, you configure a parameter (created using the **Health Plan** source entity) within a rule type and create a rule using the respective rule type. When the **C1-DPEVL** batch is executed, the system invokes the rules engine for each health plan associated with the memberships which are derived using the membership derivation algorithm. If the rules engine returns with a **Success** status at least for one health plan, the system includes the configured event in the delinquency process, else the event is deleted from the delinquency process.
	
	Once the **C1-ACDLQ** batch is executed, the system adds all the events irrespective of eligibility in the delinquency process, and later on the **C1-DPEVL** batch evaluates the eligibility for each event.

Send Membership Level Notification Source	Indicates the source from where the send membership level notification information is received. The valid values are: • Algorithm • Delinquency Process Type

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Column Name	Column Description
	Note: You need to configure the **Derive Send Member Level Notification based on Business Rules (C1-DERMLNBR)** algorithm in the delinquency process type, if you select the **Algorithm** option from the **Send Membership Level Notification Source** field. This field is not applicable for **Individual Delinquency** purposes.
Send Membership Level Notification	Indicates whether you want to send membership level notification when customer contacts are created as part of the events in the delinquency process created using the delinquency process type. The valid values are: • Send Membership Level Notification Required • Send Membership Level Notification Not Required
	Note: You need to execute the **Create Member Level Notifications (C1-MBRNT)** batch to derive the list of memberships for the delinquent person or account. This field is not applicable for **Individual Delinquency** purposes.

- **Algorithms** - This section lists the algorithms defined for the delinquency process type. It contains the following columns:

Column Name	Column Description
Sequence	Indicates the order in which the algorithms with the same system event must be triggered.
System Event	Indicates the system event when the algorithm must be triggered. The valid values are: • Calculate Unpaid and Original Amounts • Cancel Criteria • Hold Delinquency Process Criteria • Release Delinquency Process Criteria • Policies Derivation • Grace Period Derivation • Termination Date Rule Derivation • Trigger Date Recalculation Option Derivation • Termination and Reinstatement Configuration Derivation • Wait Days Derivation • Send Member Level Notification Option Derivation • Membership Notification Days Derivation
	Note: For more information on each system event, refer to Associating an Algorithm with a Delinquency Process Type on page 4241
Algorithm	Indicates the algorithm attached to the system event.
	Note: It has a link. On clicking the link, the **Algorithm** screen appears where you can view the details of the respective algorithm.

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- **Grace Period Configuration** - This section lists the grace period configuration defined for the delinquency process type. It contains the following fields:

Field Name	Field Description
Grace Period Source	Indicates the source for grace period. The valid values are: • Algorithm • Delinquency Process Type
	Note: You need to configure the **Derive Grace Period based on Business Rules (C1-DERGRBR)** algorithm in the delinquency process type, if you select the **Algorithm** option from the **Grace Period Source** field.
Grace Period (Days)	Displays the number of days which are used to define the grace period end date for the delinquency process.
	Note: For example, if a delinquency process contains bills with the latest bill due date as 01-Jan-2023, the system considers the latest bill due date as the grace period start date which is 01-Jan-2023. Now, if you have configured the grace period as 30 days, the system determines the grace period end date as 31-Jan-2023 by using the following formula: `Grace Period End Date = Grace Period Start Date + ' Grace Period`
Grace Start Date Basis	Indicates the option based on which the grace date calculation is performed. The valid values are: • Delinquency Process Creation Date • Latest Bill Due Date • X Days after Latest Bill Due Date
	Note: The grace start date basis is used as the base date for performing the grace period calculation.
Add Days To Due Date	Displays the number of days by which the due date gets extended and is further used for calculating the grace end date.
	Note: For example, if the grace period start date is set as 01-Jan-2023 and you have configured the add days to due date as 7 days, the system adds the add days to due date to the grace period start date. Therefore, the new grace period start date is now set as 08-Jan-2023. The system then combines the grace period start date with the grace period to calculate the grace period end date using the following formula: `Grace Period End Date = Grace Period Start Date + ' Grace Period`

- **Termination and Reinstatement Configuration** - This section lists the termination and reinstatement configuration defined for the delinquency process type. It contains the following fields:

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Field Name	Field Description
Termination Reinstatement Configuration Source	Indicates the source for termination and reinstatement configuration. The valid values are: • Algorithm • Delinquency Process Type
	Note: You need to configure the **Derive Termination and Reinstatement configuration based on Business Rules (C1-DERTROBR)** algorithm in the delinquency process type, if you select the **Algorithm** option from the **Termination Reinstatement Configuration Source** field.
Trigger Termination Process	Indicates an option based on which the termination process is triggered. The valid values are: • After X Days • Immediate • Month End
Termination Wait Days	Displays the wait period (in days) after which the termination process is triggered.
	Note: The system sets the termination wait days to zero, if you do not specify a value while defining or editing a delinquency process type. The data appears in this field only when you have selected the **After X Days** option from the **Termination Wait Days** field.
Allow Automatic Reinstatement	Indicates whether you want to allow automatic reinstatement of the individual membership. The valid values are: • Yes • No
	Note: This field is not applicable for **Individual Delinquency** purposes.
Maximum Automatic Reinstatement Count	Displays the maximum number of time the system allows automatic reinstatement.
	Note: This field is not applicable for **Individual Delinquency** purposes.
Trigger Reinstatement Process	Indicates an option based on which the reinstatement process must be triggered. The valid values are: • After X Days • Immediate • Month End
	Note: This field is not applicable for **Individual Delinquency** purposes.
Reinstatement Wait Days	Displays the wait period (in days) after which the reinstatement process is triggered.

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Field Name	Field Description
	Note: The system sets the reinstatement wait days to zero, if you do not specify a value while defining or editing a delinquency process type. This field is not applicable for **Individual Delinquency** purposes.
Reinstatement Threshold	Displays the value based on which the automatic reinstatement takes place.
	Note: The percentage of the amount paid must be greater than or equal to the threshold percentage based on which automatic reinstatement takes place. This field is not applicable for **Individual Delinquency** purposes.
Days Since Termination	Displays the number of days since the termination effective date for automatic reinstatement to take place.
	Note: If you configure the days since termination as 10 days for automatic reinstatement, the system adds days since termination to the termination effective date irrespective of whether termination effective date is elapsed or not. If the termination effective date is elapsed, the system does not perform the automatic reinstatement. In this case, you have to manually conduct the reinstatement process. The automatic reinstatement process is triggered only within the certain number of days once the termination has taken place. This field is not applicable for **Individual Delinquency** purposes.
Membership Notification Days Source	Indicates the source from where the membership notification days information is received. The valid values are: • Algorithm • Delinquency Process Type
	Note: You need to configure the **Derive Member Notification Days based on Business Rules (C1-DERMNDAYS)** algorithm in the delinquency process type, if you select the **Algorithm** option from the **Membership Notification Days Source** field. This field is not applicable for **Individual Delinquency** purposes.
Member Notification Days	Displays the number of days after which the member receives notification.
	Note: This field is not applicable for **Individual Delinquency** purposes.

Note: This section appears only when the **Automatic Termination and Reinstatement Required** checkbox is selected. At present, the automatic reinstatement process is not applicable for individual delinquency purposes, hence this section displays fields related to automatic termination such as **Termination Reinstatement Configuration Source**, **Trigger Termination Process**, and **Termination Wait Days**.

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- **Termination Date Rule Priority** - This section lists the priority and termination date rule defined for the delinquency process type. It contains the following columns:

Column Name	Column Description
Priority	Displays the order in which the termination date rule is considered while defining a delinquency process type. **Note:** The system selects the termination date rule which has the highest priority. For example, let us assume that an individual customer exists in the system with different memberships, where the membership attributes are responsible to retrieve the termination date rules. If you want to terminate an individual customer who has different memberships, the system requires a termination date rule which calculates the termination effective date for the termination process. Now, the system goes through multiple memberships and derives different termination date rules for different memberships, making it difficult to select a particular termination date rule to calculate the termination effective date. Here, the system derives the priority sequence of each rule, and selects the termination date rule which has the highest priority.
Termination Date Rule	Indicates the termination date rule used for calculating the termination effective date.

Note: This section appears only when the **Automatic Termination and Reinstatement Required** option is selected.

- **Termination Reasons For Automatic Reinstatement** - This section lists the termination reasons defined for automatic reinstatement in the delinquency process type. It contains the following column:

Column Name	Column Description
Termination Reason	Indicates the reason which is specified during the termination process. **Note:** The automatic reinstatement takes place only when a reason is specified during the termination process, and the specified reason appears in the **Termination Reason** list. If the specified reason does not appear in the **Termination Reason** list, you have to manually perform the reinstatement process. This field is not applicable for individual delinquency purposes.

Note: This section appears only when the **Automatic Termination and Reinstatement Required** option is selected.

- **Trigger Date Recalculation Configuration** - This section lists the termination reasons defined for automatic reinstatement in the delinquency process type. It contains the following fields:

Field Name	Field Description
Trigger Date Recalculation On Hold Release Source	Indicates the source for recalculating the trigger date once the hold request is released. The valid values are: • Algorithm • Delinquency Process Type

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Field Name	Field Description
	Note: You need to configure the **Derive Recalculate Trigger Date option based on Business Rules (C1-DERRTDBR)** algorithm in the delinquency process type, if you select the **Algorithm** option from the **Trigger Date Recalculation On Hold Release Source** field.
Trigger Date Recalculation On Hold Release	Indicates whether you want to recalculate the trigger date once the hold request is released. The valid values are: • Yes • No
Trigger Date Recalculation On Resume Source	Indicates the source for recalculating the trigger date once the hold request is resumed. The valid values are: • Algorithm • Delinquency Process Type
	Note: You need to configure the **Derive Recalculate Trigger Date option based on Business Rules (C1-DERRTDBR)** algorithm in the delinquency process type, if you select the **Algorithm** option from the **Trigger Date Recalculation On Resume Source** field.
Trigger Date Recalculation On Resume	Indicates whether you want to recalculate the trigger date once the hold request is resumed. The valid values are: • Yes • No

Note: The system conducts trigger date recalculation in the following scenarios:

- When the delinquency process is kept on hold for certain days and is later released either on hold end date or through manual intervention, the system determines the total number of days (hold days) the delinquency process was kept on hold. The system adds the calculated days to the trigger date which was calculated earlier and calculates the trigger date once again. This recalculated trigger date is used to trigger those events which were not triggered as the delinquency process was kept on hold.
- When you make a payment against a bill for which a delinquency process is created, the system cancels the delinquency process. If the payment made against a bill gets canceled due to any reason after some days, the system checks whether there are any overdue bills for the respective account. If the overdue bills exist, the delinquency process which was canceled earlier is resumed. Once the delinquency process is resumed, the system determines the total number of days (extra days) the delinquency process was in canceled state. The system adds the extra days to the trigger date which was calculated earlier and calculates the trigger date once again. This recalculated trigger date is used to trigger those events which were not triggered as the delinquency process was canceled.

- **Approval Configuration** - This section lists the approval configuration defined for the delinquency process type. It contains the following fields:

Field Name	Field Description
Approval Required	Indicates whether an approval is required for certain manual actions performed on the delinquency process created using the delinquency process type.
Approval To Do Type	Indicates the To Do entry created of the specified To Do type.
	Note: This field appears when the **Approval Required** option is selected.

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Field Name	Field Description
Approval To Do Role	Indicates that users with the specified To Do Role can only perform the following actions. The valid values are: • Approve • Reject • Withdraw
	Note: The list includes only those To Do roles which are associated with the approval To Do type. This field appears when the **Approval Required** option is selected.
Approval Action	Indicates the set of actions for which the approval process must be triggered. The valid values are: • Cancel • Edit Hold • Edit Trigger Date • Hold • Release Hold • Request Reinstatement • Skip Event • Trigger Event
	Note: This field appears when the **Approval Required** option is selected.

By default, the **Delinquency Process Type** zone does not appear in the **Delinquency Process Type** screen. It appears when you click the **Broadcast** (ᯤ) icon corresponding to a delinquency process type in the **Delinquency Process Type List** zone.

Defining a Delinquency Process Type

Prerequisites

To define a delinquency process type, you should have:

- Delinquency event types defined in the application.
- Algorithms defined using the **C1-CUAOAB**, **C1-CANDELPRC**, **C1-MEMBDLQ**, **C1-HLDDELPRC**, **C1-RECALCHLD**, **C1-DERGRBR**, **C1-DERMLNBR**, **C1-DERTRBR**, **C1-DERWDBR**, **C1-DERTROBR**, **C1-DERMNDAYS**, and **C1-DERRTDBR** algorithm types.
- Delinquency process type business objects defined in the application.
- Delinquency process business objects defined in the application.
- Approval To Do Type and Approval To Do Role defined in the application.

Procedure

To define a delinquency process type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **D** and then click **Delinquency Process Type**.
   A sub-menu appears.

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3. Click the **Add** option from the **Delinquency Process Type** sub-menu.

   The **Delinquency Process Type** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details about the delinquency process type.
   - **Delinquency Process Type Events** - Used to define events for the delinquency process type.
   - **Algorithms** - Used to associate an algorithm with the delinquency process type.
   - **Grace Period Configuration** - Used to configure the grace period for the delinquency process type.
   - **Termination and Reinstatement Configuration** - Used to configure the termination and reinstatement for the delinquency process type.
   - **Termination Date Rule Priority** - Used to define the termination date rule priority for the delinquency process type.
   - **Termination Reasons For Automatic Reinstatement** - Used to define the termination reason for an automatic reinstatement for the delinquency process type.
   - **Trigger Date Recalculation Configuration** - Used to configure the trigger date recalculation for the delinquency process type.
   - **Approval Configuration** - Used to configure an approval for the delinquency process type.
   - **Characteristics** - Used to define the characteristics for the delinquency process type.

   The **Main** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Delinquency Process Type	Used to specify the delinquency process type.	Yes
Delinquency Entity Type	Used to specify the entity type for which the delinquency process type is created.	No
Delinquency Process Business Object	Indicates the business object using which you are defining the delinquency process type.	Yes
Description	Used to specify the description for the delinquency process type.	No
Detailed Description	Used to specify additional information about the delinquency process type.	No
Status	Used to indicate the status of the delinquency process type. The valid values are: • Active • Inactive **Note:** By default, the **Active** option is selected.	No
Collection Object	Used to indicate the entity on which the collection should take place in the delinquency process. The valid value is: • Bill **Note:** At present, the system supports **Bill** as the collection entity.	No
Automatic Termination and Reinstatement Required	Used to indicate whether automatic termination and reinstatement is required or not for the delinquency process.	No

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Field Name	Field Description	Mandatory (Yes or No)
	Note: At present, automatic reinstatement is not applicable for individual delinquency.	
Delinquency Event Trigger Mode	Used to indicate the mode in which the delinquency event must be triggered. The valid values are: • Automatic • Manual • Manual or Automatic **Note:** You must specify the delinquency event trigger mode which is already defined in the system.	No
Trigger Date Calculation Mode	Used to indicate the mode in which the date calculation must be triggered. The valid values are: • Latest Bill Due Date with Grace Period • Usage Basis **Note:** By default, this field is disabled. It is enabled only when you select the **Automatic** option from the **Delinquency Event Trigger Mode** list.	Yes (Conditional) **Note:** This field is required when you select the **Automatic** option from the **Delinquency Event Trigger Mode** list.
Wait Period	Used to indicate the specific period considered for calculating the trigger dates for the events on the delinquency process. The valid values are: • Monthly Cyclic • Wait Days	Yes
Usage Basis	Used to indicate the option based on which the date calculation must be take place. The valid values are: • Delinquency Process Creation Date • Grace Start Date • Latest Bill Date • Latest Bill Due Date **Note:** By default, this field is disabled. It is enabled only when you select the **Usage Basis** option from the **Trigger Date Calculation Mode** list.	Yes (Conditional) **Note:** This field is required when you select the **Usage Basis** option from the **Trigger Date Calculation Mode** list.
Consider Work Days	Used to indicate whether you want to consider work days for the trigger dates of the events on the delinquency process.	No

4. Enter the required details in the **Main** section.
5. Configure an event for the delinquency process type, if required.
6. Associate an algorithm with a delinquency process type, if required.
7. Configure the grace period for the delinquency process type, if required.
8. Configuring the automatic termination and reinstatement process in a delinquency process type, if required.
9. Set the termination date rules in a delinquency process type, if required.
10. Set the termination reason for an automatic reinstated membership in a delinquency process type, if required.
11. Configure the trigger date recalculation method in a delinquency process type, if required.

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12. Configure the approval process in a delinquency process type, if required.
13. Define characteristics for the delinquency process type, if required.
14. Click **Save**.
    The delinquency process type is defined.

Related Topics

For more information on...	See...
Delinquency Process Type screen	Delinquency Process Type (Screen) on page 4222
How to configure an event for a delinquency process type	Configuring an Event for a Delinquency Process Type on page 4237
How to associate an algorithm with a delinquency process type	Associating an Algorithm with a Delinquency Process Type on page 4241
How to configure the grace period for a delinquency process type	Configuring the Grace Period for a Delinquency Process Type on page 4243
How to configure the automatic termination and reinstatement process in a delinquency process type	Configuring the Automatic Termination and Reinstatement Process in a Delinquency Process Type on page 4245
How to set the termination date rules in a delinquency process type	Setting the Termination Date Rules in a Delinquency Process Type on page 4248
How to set the reasons for termination of an automatic reinstated membership in a delinquency process type	Setting the Reasons for Termination of an Automatic Reinstated Membership in a Delinquency Process Type on page 4249
How to configure the trigger date recalculation method in a delinquency process type	Configuring the Trigger Date Recalculation Method in a Delinquency Process Type on page 4249
How to configure the approval process in a delinquency process type	Configuring the Approval Process in a Delinquency Process Type on page 4251
How to defining a characteristic for a delinquency process type	Defining a Characteristic for a Delinquency Process Type on page 4252

Configuring an Event for a Delinquency Process Type

Procedure

To configure an event for a delinquency process type:

1. Ensure that the **Delinquency Process Event Types** section is expanded when you are defining *or* editing a delinquency process type.

   The **Delinquency Process Event Types** section contains the following fields in a grid:

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Field Name	Field Description	Mandatory (Yes or No)
Sequence	Used to specify the order in which the events are executed. **Note:** The event execution is totally based on the sequence of trigger dates.	Yes
Delinquency Event Type	Used to indicate the type of event configured in the delinquency process type. **Note:** The **Search** (🔍) icon appears corresponding to the **Delinquency Event Type** field. On clicking the **Search** icon, the **Delinquency Event Type Search** window appears.	No

Trigger Period	Used to indicate the period when you want to trigger an event using the delinquency event type. The valid values are:
	• After Grace End Date
	• Before Grace End Date
	Note:
	By default, this field is disabled. It is enabled only when you select the **Latest Bill Due Date with Grace Period** option from the **Trigger Date Calculation Mode** field.
	The system calculates the trigger date based on the trigger period. If you select the **After Grace End Date** option, the system calculates the trigger date using the following formula:
	`Trigger Date = Grace End Date + Wait ' Days`
	If you select the **Before Grace End Date** option, the system calculates the trigger date using the following formula:
	`Trigger Date = Grace End Date -- ' Wait Days`
		Yes (Conditional)
		Note: This field is required when you select the **Latest Bill Due Date with Grace Period** option from the **Trigger Date Calculation Mode** field.

Wait Period Source	Used to indicate the source from where the wait period is received. The valid values are: • Algorithm • Delinquency Process Type **Note:** You need to configure the **Derive Wait Period Details based on Business Rules (C1-DERWDBR)** algorithm in the delinquency process type, if you select the **Algorithm** option from the **Wait Days Source** field. By default, the **Delinquency Process Type** option type is selected.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
Wait Days	Used to specify the wait period (in days) after which the delinquency event is triggered. **Note:** This field is disabled only when you select the **Monthly Cyclic** option from the **Wait Period** field.	Yes (Conditional) **Note:** This field is required when you have selected the **Wait Days** option from the **Wait Period** field.
Wait Months	Used to specify the wait period (in months) which is used to calculate the trigger date. **Note:** By default, this field is disabled. It is enabled only when you select the **Monthly Cyclic** option from the **Wait Period** field.	No
Day of Month	Used to indicate the particular day of the month which is retrieved using the wait months. **Note:** By default, this field is disabled. It is enabled only when you select the **Monthly Cyclic** option from the **Wait Period** field.	Yes (Conditional) **Note:** This field is required when you have selected the **Monthly Cyclic** option from the **Wait Period** field.
Move Past Dated Event To Future	Used to indicate whether you want to move the past dated event to a future date. **Note:** By default, this field is disabled. It is enabled only when you select the **Monthly Cyclic** option from the **Wait Period** field.	No
Defer to Next Cycle	Used to indicate whether you want to move the delinquency event to the next billing cycle.	No
Preview Required	Used to indicate whether an delinquency event requires a preview before it is actually triggered.	No
Preview Days	Used to specify the preview period (in days) prior to which the delinquency event is triggered for preview. **Note:** The system calculates the preview date based on preview days. The preview date is calculated using the following formula: `Preview Date = Trigger Date -- ' Preview Days`	No
Skip Past Event	Used to indicate whether you want to skip any event if the calculated trigger date for the event is past dated.	No
Eligibility Rule Type	Used to indicate the rule type eligibility for the delinquency process type.	No

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Field Name	Field Description	Mandatory (Yes or No)

	Note:
	To define the rule type eligibility, you need to do the following:
	• Define the required parameters using the following source entities:
	  • Account
	  • Health Plan
	  • Health Product
	  • Person
	  and set the parameter usage to **Rule Eligibility Criteria**.
	• Define a rule type where the rule type usage is set to **Delinquency Process Event Eligibility**.
	• Define a rule using the rule type with a parameter configured using the above source entities.
	For example, you configure a parameter (created using the **Health Plan** source entity) within a rule type and create a rule using the respective rule type. When the **C1-DPEVL** batch is executed, the system invokes the rules engine for each health plan associated with the memberships which are derived using the membership derivation algorithm. If the rules engine returns with a **Success** status at least for one health plan, the system includes the configured event in the delinquency process, else the event is deleted from the delinquency process.
	Once the **C1-ACDLQ** batch is executed, the system adds all the events irrespective of eligibility in the delinquency process, and later on the **C1-DPEVL** batch evaluates the eligibility for each event.	

Send Membership Level Notification Source	Used to indicate the source from where the send membership level notification information is received. The valid values are: • Algorithm • Delinquency Process Type **Note:** By default, the **Delinquency Process Type** option type is selected. This field is not applicable for **Individual Delinquency** purposes.	Yes (Conditional) **Note:** This field is required when you have selected an option from the **Send Membership Level Notification** field.
Send Membership Level Notification	Used to indicate whether you want to send membership level notification when customer contacts are created as part	Yes (Conditional)

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Field Name	Field Description	Mandatory (Yes or No)
	of the events in the delinquency process created using the delinquency process type. The valid values are: • Send Member Level Notification Required • Send Member Level Notification Not Required **Note:** This field is not applicable for **Individual Delinquency** purposes.	**Note:** This field is required when you have selected an option from the **Send Membership Level Notification Source** field.

2. Enter the required details in the **Delinquency Process Event Types** section.
3. If you want to add more than one event in a delinquency process type, click the **Add** (+) icon and then repeat step 2.

Note: However, if you want to remove an event from a delinquency process type, click the **Delete** (🗑) icon corresponding to the **Audit Event Type** field.

4. Click **Save**.
   The event is configured in a delinquency process type.

Associating an Algorithm with a Delinquency Process Type

Prerequisites

To associate an algorithm with a delinquency process type, you should have:

- Algorithm and Algorithm Type defined in the application.
- System event defined in the application.

Procedure

To associate an algorithm with a delinquency process type:

1. Ensure that the **Algorithms** section is expanded when you are defining *or* editing the delinquency process type.

   The **Algorithms** section contains the following columns in a grid:

Column Name	Column Description	Mandatory (Yes or No)
System Event	Used to indicate the system event when you want to execute the algorithm. The following table lists the system events on which the algorithms must be attached: The following table lists the algorithms that are associated with a delinquency process type:	Yes (Conditional) **Note:** This field is required while associating an algorithm with the delinquency process type.

System Event	Algorithm	Description
Calculate Unpaid and Original Amounts	C1-CUAOAB	Refer to C1-CUAOAB on page 4150
Cancel Criteria	C1-CANDELPRC	Refer to C1-CANDELPRC on page 4150

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<table>
<tr><th>Column Name</th><th>Column Description</th><th>Mandatory (Yes or No)</th></tr>
<tr><td></td><td>
<table>
<tr><th>System Event</th><th>Algorithm</th><th>Description</th></tr>
<tr><td></td><td>C1-CANDPAPTC</td><td>Refer to C1-CANDPAPTC on page 4152</td></tr>
<tr><td>Memberships Derivation</td><td>C1-MEMBDLQ</td><td>Refer to C1-MEMBDLQ on page 4154</td></tr>
<tr><td>Hold Delinquency Process Criteria</td><td>C1-HLDDELPRC</td><td>Refer to C1-HLDDELPRC on page 4153</td></tr>
<tr><td>Release Delinquency Process Criteria</td><td>C1-RELDELPRC</td><td>Refer to C1-RELDELPRC on page 4155</td></tr>
<tr><td>Grace Period Derivation</td><td>C1-DERGRBR</td><td>Refer to C1-DERGRBR on page 4152</td></tr>
<tr><td>Send Member Level Notification Option Derivation</td><td>C1-DERMLNBR</td><td>Refer to C1-DERMLNBR on page 4156</td></tr>
<tr><td>Termination Date Rule Derivation</td><td>C1-DERTRBR</td><td>Refer to C1-DERTRBR on page 4157</td></tr>
<tr><td>Wait Days Derivation</td><td>C1-DERWDBR</td><td>Refer to C1-DERWDBR on page 4158</td></tr>
<tr><td>Termination and Reinstatement Configuration Derivation</td><td>C1-DERTROBR</td><td>Refer to C1-DERTROBR on page 4157</td></tr>
<tr><td>Membership Notification Days Derivation</td><td>C1-DERMNDAYS</td><td>Refer to C1-DERMNDAYS on page 4159</td></tr>
<tr><td>Trigger Date Recalculation Option Derivation</td><td>C1-DERRTDBR</td><td>Refer to C1-DERRTDBR on page 4158</td></tr>
</table>
</td><td></td></tr>
<tr><td>Sequence</td><td>Used to specify the order in which the algorithms for each system event must be triggered.</td><td>Yes (Conditional)
Note: This field is required while associating an algorithm with the delinquency process type.</td></tr>
<tr><td>Algorithm</td><td>Used to specify the algorithm.</td><td>Yes (Conditional)</td></tr>
</table>

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Column Name	Column Description	Mandatory (Yes or No)
	Note: If you select the system event option, the **Search** (🔍) icon appears corresponding to the **Algorithm** field. On clicking the **Search** (🔍) icon, the **Algorithm Search** window appears. On specifying the algorithm, the description of the algorithm appears corresponding to the **Algorithm** field.	**Note:** This field is required while associating an algorithm with the delinquency process type.

2. If you want to associate more than one algorithm with the delinquency process type, click the **Add** (+) icon and then repeat step 2.

Note: However, if you want to disassociate an algorithm from the delinquency process type, click the **Delete** (🗑) icon corresponding to the algorithm.

3. Click **Save**.
The algorithm is associated with a delinquency process type.

Configuring the Grace Period for a Delinquency Process Type

Procedure

To configure the grace period for a delinquency process type:

1. Ensure that the **Grace Period Configuration** section is expanded when you are defining *o*r editing a delinquency process type.

The **Grace Period Configuration** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Grace Source Period	Used to indicate the source from where the grace period is received. The valid values are: • Algorithm • Delinquency Process Type	Yes
	Note: By default, the **Delinquency Process Type** is selected. You need to configure the **Derive Grace Period based on Business Rules (C1-DERGRBR)** algorithm in the delinquency process type, if you select the **Algorithm** option from the **Grace Period Source** field.	
Grace Period (Days)	Used to specify the number of days which are used to define the grace period end date for the delinquency process.	Yes (Conditional)

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Field Name	Field Description	Mandatory (Yes or No)
	Note: For example, if a delinquency process contains bills with the latest bill due date as 01-Jan-2023, the system considers the latest bill due date as the grace period start date which is 01-Jan-2023. Now, if you have configured the grace period as 30 days, the system determines the grace period end date as 31-Jan-2023 by using the following formula: `Grace Period End Date = Grace Period ' Start Date + Grace Period`	**Note:** This field is required if you have selected the **Delinquency Process Type** option from the **Grace Source Period** list.
Grace Start Date Basis	Used to indicate the option based on which the grace date calculation is performed. The valid values are: • Delinquency Process Creation Date • Latest Bill Due Date • X Days after Latest Bill Due Date **Note:** By default, this field is disabled. It is enabled only when you select the **Grace Start Date** option from the **Usage Basis** list. The grace start date basis is used as the base date for performing the grace period calculation.	Yes (Conditional) **Note:** This field is required if you have selected the **Grace Start Date** option from the **Usage Basis** list.
Add Days To Due Date	Used to specify the number of days by which the due date gets extended and is further used for calculating the grace period end date. **Note:** This field appears only when you select the **X Days after Latest Bill Due Date** option from the **Grace Start Date Basis** list. If you do not specify any value, by default it is set to zero (0). For example, if the grace period start date is set as 01-Jan-2023 and you have configured the add days to due date as 7 days, the system adds the add days to due date to the grace period start date. Therefore, the new grace period start date is now set as 08-Jan-2023. The system then combines the grace period start date with the grace period to calculate the grace period end date using the following formula: `Grace Period End Date = Grace Period ' Start Date + Grace Period`	No

2. Enter the required details in the **Grace Period Configuration** section.
3. Click **Save**.
   The grace period is configured for a delinquency process type.

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Configuring the Automatic Termination and Reinstatement Process in a Delinquency Process Type

Procedure

To configure the automatic termination and reinstatement process in a delinquency process type:

1. Ensure that the **Termination and Reinstatement Configuration** section is expanded when you are defining *or* editing a delinquency process type.

   The **Termination and Reinstatement Configuration** section contains the following fields in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Termination Reinstatement Configuration Source	Used to indicate the source from where the termination and reinstatement configuration is received. The valid values are: • Algorithm • Delinquency Process Type **Note:** By default, the **Delinquency Process Type** option type is selected. You need to configure the **Derive Termination and Reinstatement configuration based on Business Rules (C1-DERTROBR)** algorithm in the delinquency process type, if you select the **Algorithm** option from the **Termination Reinstatement Configuration Source** field.	Yes
Trigger Termination Process	Used to indicate an option based on which the termination process is triggered. The valid values are: • After X Days • Immediate • Month End **Note:** This field is enabled only when you select the **Delinquency Process Type** option from the **Termination Reinstatement Configuration Source** field.	Yes (Conditional) **Note:** This field is required when you select the **Delinquency Process Type** option from the **Termination Reinstatement Configuration Source** field.
Termination Wait Days	Used to specify the wait period (in days) after which the termination process is triggered. **Note:** You cannot specify a negative value in the **Termination Wait Days** field. If you do not specify the termination wait days, by default, it is set to zero (0). This field is enabled only when you select the **After X Days** option from the **Trigger Termination Process** field.	No
Allow Automatic Reinstatement	Used to indicate whether you want to allow automatic reinstatement of the individual membership. The valid values are: • Yes	Yes (Conditional)

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Field Name	Field Description	Mandatory (Yes or No)
	• No **Note:** This field is not applicable for **Individual Delinquency** purposes. This field is enabled only when you select the **Delinquency Process Type** option from the **Termination Reinstatement Configuration Source** field.	**Note:** This field is required when you select the **Delinquency Process Type** option from the **Termination Reinstatement Configuration Source** field.
Maximum Automatic Reinstatement Count	Used to specify the maximum number of time the system allows automatic reinstatement. **Note:** This field is not applicable for **Individual Delinquency** purposes. This field is enabled when you select the **Yes** option from the **Allow Automatic Reinstatement** field.	No
Trigger Reinstatement Process	Used to indicate an option based on which the reinstatement process must be triggered. The valid values are: • After X Days • Immediate • Month End **Note:** This field is not applicable for **Individual Delinquency** purposes. This field is enabled only when you select the **Delinquency Process Type** option from the **Termination Reinstatement Configuration Source** field.	Yes (Conditional) **Note:** This field is required when you select the **Delinquency Process Type** option from the **Termination Reinstatement Configuration Source** field.
Reinstatement Wait Days	Used to specify the wait period (in days) after which the reinstatement process is triggered. **Note:** This field is not applicable for **Individual Delinquency** purposes. This field is enabled only when you select the **After X Days** option from the **Trigger Reinstatement Process** field. You cannot specify a negative value in the **Reinstatement Wait Days** field. If you do not specify the reinstatement wait days, by default, it is set to zero (0).	No
Reinstatement Threshold	Used to specify the value based on which the automatic reinstatement takes place.	Yes (Conditional)

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Field Name	Field Description	Mandatory (Yes or No)
	Note: This field is not applicable for **Individual Delinquency** purposes. You must specify a value for reinstatement threshold which exists between 1 to 100. This field is enabled only when you select the **Delinquency Process Type** option from the **Termination Reinstatement Configuration Source** field.	**Note:** This field is required when you select the **Delinquency Process Type** option from the **Termination Reinstatement Configuration Source** field.
Days Since Termination	Used to specify the number of days since the termination effective date for automatic reinstatement to take place. **Note:** If you configure the days since termination as 10 days for automatic reinstatement, the system adds days since termination to the termination effective date irrespective of whether termination effective date is elapsed or not. If the termination effective date is elapsed, the system does not perform the automatic reinstatement. In this case, you have to manually conduct the reinstatement process. The automatic reinstatement process is triggered only within the certain number of days once the termination has taken place. This field is not applicable for **Individual Delinquency** purposes. This field is enabled only when you select the **Delinquency Process Type** option from the **Termination Reinstatement Configuration Source** field.	No
Membership Notification Days Source	Used to indicate the source from where the membership notification days information is received. The valid values are: • Algorithm • Delinquency Process Type **Note:** By default, the **Delinquency Process Type** option type is selected. You need to configure the **Derive Member Notification Days based on Business Rules (C1-DERMNDAYS)** algorithm in the delinquency process type, if you select the **Algorithm** option from the **Membership Notification Days Source** field. This field is not applicable for **Individual Delinquency** purposes.	Yes
Member Notification Days	Used to specify the number of days after which the member receives notification.	No

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Field Name	Field Description	Mandatory (Yes or No)
	Note: This field is enabled only when you select the **Delinquency Process Type** option from the **Termination Reinstatement Configuration Source** field. You cannot specify a negative value in the **Member Notification Days** field. If you do not specify the member notification days, by default, it is set to zero (0). This field is not applicable for **Individual Delinquency** purposes.	

2. Enter the required details in the **Termination and Reinstatement Configuration** section.
3. Click **Save**.
   The automatic termination and reinstatement process is configured in a delinquency process type.

Setting the Termination Date Rules in a Delinquency Process Type

Procedure

To set the termination date rules in a delinquency process type:

1. Ensure that the **Termination Date Rule Priority** section is expanded when you are defining *o*r editing a delinquency process type.

   The **Termination Date Rule Priority** section contains the following fields in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Priority	Used to specify the order in which the termination date rule is considered while defining a delinquency process type.	Yes (Conditional) **Note:** This field is required if you have selected an option from the **Termination Date Rule** field.
Termination Date Rule	Used to indicate the termination date rule used for calculating the termination effective date.	Yes (Conditional) **Note:** This field is required if you have specified a value in the **Priority** field.

2. Enter the required details in the **Termination Date Rule Priority** section.
3. If you want to set more than one termination date rule in a delinquency process type, click the **Add** (+) icon and then repeat step 2.

Note: However, if you want to remove a termination date rule from a delinquency process type, click the **Delete** (🗑) icon corresponding to the **Priority** field.

4. Click **Save**.
   The termination date rule is set in a delinquency process type.

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Setting the Reasons for Termination of an Automatic Reinstated Membership in a Delinquency Process Type

Prerequisites

To set the reasons for termination of an automatic reinstated membership in a delinquency process type, you should have:

- Termination reasons for automatic reinstatement of a membership defined in the system

Procedure

To set the reasons for termination of an automatic reinstated membership in a delinquency process type:

1. Ensure that the **Termination Reasons For Automatic Reinstatement** section is expanded when you are defining *o*r editing a delinquency process type.

   The **Termination Reasons For Automatic Reinstatement** section contains the following fields in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Termination Reason	Used to indicate the reason which is specified during the termination process. **Note:** The automatic reinstatement takes place only when a reason is specified during the termination process, and the specified reason appears in the **Termination Reason** list. If the specified reason does not appear in the **Termination Reason** list, you have to manually perform the reinstatement process. This field is not applicable for **Individual Delinquency** purposes.	No

2. Enter the required details in the **Termination Date Rule Priority** section.
3. If you want to set more than one termination reason for an automatically reinstated *m*embership in a delinquency process type, click the **Add** (+) icon and then repeat step 2.

   Note: However, if you want to remove a termination reason for an automatically reinstated *m*embership from a delinquency process type, click the **Delete** (🗑) icon corresponding to the **Termination Reason** field.

4. Click **Save**.
   The termination reason for an automatic reinstated membership is set in a delinquency process type.

Configuring the Trigger Date Recalculation Method in a Delinquency Process Type

Procedure

To configure the trigger date recalculation method in a delinquency process type:

1. Ensure that the **Trigger Date Recalculation Configuration** section is expanded when you are defining *o*r editing a delinquency process type.

   The **Trigger Date Recalculation Configuration** section contains the following fields:

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Field Name	Field Description	Mandatory (Yes or No)
Trigger Date Recalculation On Hold Release Source	Used to indicate the source for recalculating the trigger date once the hold request is released. The valid values are: • Algorithm • Delinquency Process Type **Note:** By default, the **Delinquency Process Type** option is selected. You need to configure the **Derive Recalculate Trigger Date option based on Business Rules (C1-DERRTDBR)** algorithm in the delinquency process type, if you select the **Algorithm** option from the **Trigger Date Recalculation On Hold Release Source** field.	Yes
Trigger Date Recalculation On Hold Release	Used to indicate whether you want to recalculate the trigger date once the hold request is released. The valid values are: • Yes • No **Note:** By default, the **No** option is selected.	Yes (Conditional) **Note:** This field is required if you have selected the **Delinquency Process Type** option from the **Trigger Date Recalculation On Hold Release Source** field.
Trigger Date Recalculation On Resume Source	Used to indicate the source for recalculating the trigger date once the hold request is resumed. The valid values are: • Algorithm • Delinquency Process Type **Note:** By default, the **Delinquency Process Type** option is selected. You need to configure the **Derive Recalculate Trigger Date option based on Business Rules (C1-DERRTDBR)** algorithm in the delinquency process type, if you select the **Algorithm** option from the **Trigger Date Recalculation On Resume Source** field.	Yes
Trigger Date Recalculation On Resume	Used to indicate whether you want to recalculate the trigger date once the hold request is resumed. The valid values are: • Yes • No **Note:** By default, the **No** option is selected.	Yes (Conditional) **Note:** This field is required if you have selected the **Delinquency Process Type** option from the **Trigger Date Recalculation On Resume** field.

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Note: The system conducts trigger date recalculation in the following scenarios:

- When the delinquency process is kept on hold for certain days and is later released either on hold end date or through manual intervention, the system determines the total number of days (hold days) the delinquency process was kept on hold. The system adds the calculated days to the trigger date which was calculated earlier and calculates the trigger date once again. This recalculated trigger date is used to trigger those events which were not triggered as the delinquency process was kept on hold.
- When you make a payment against a bill for which a delinquency process is created, the system cancels the delinquency process. If the payment made against a bill gets canceled due to any reason after some days, the system checks whether there are any overdue bills for the respective account. If the overdue bills exist, the delinquency process which was canceled earlier is resumed. Once the delinquency process is resumed, the system determines the total number of days (extra days) the delinquency process was in canceled state. The system adds the extra days to the trigger date which was calculated earlier and calculates the trigger date once again. This recalculated trigger date is used to trigger those events which were not triggered as the delinquency process was canceled.

2. Enter the required details in the **Trigger Date Recalculation Configuration** section.
3. Click **Save**.
   The trigger date recalculation method is configured in a delinquency process type.

Configuring the Approval Process in a Delinquency Process Type

Prerequisites

To configure an approval process in a delinquency process type, you should have:

- Required approval profiles defined in the application
- Approval To Do Type and Approval To Do Role defined in the application

Procedure

To configure an approval process in a delinquency process type:

1. Ensure that the **Approval Configuration** section is expanded when you are defining *o*r editing a delinquency process type.

   The **Approval Configuration** section contains the following fields in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Approval Required	Used to indicate whether an approval is required for certain manual actions performed on the delinquency process created using the delinquency process type.	No
Approval To Do Type	Used to indicate the To Do entry created of the specified To Do type. **Note:** The **Search** (🔍) icon appears corresponding to the **Approval To Do Type** field. On clicking the **Search** icon, the **To Do Type Search** window appears. On specifying the To Do type, the description of the To Do Type appears next to the **Approval To Do Type** field. This field appears when the **Approval Required** check box is selected.	Yes (Conditional) **Note:** This field is required if you have selected the **Approval Required** check box.

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Field Name	Field Description	Mandatory (Yes or No)
Approval To Do Role	Used to indicate that users with the specified To Do Role can only perform the following actions. The valid values are: • Approve • Reject • Withdraw **Note:** The list includes only those To Do roles which are associated with the approval To Do type. This field appears when the **Approval Required** check box is selected.	No
Approval Action	Used to indicate the set of actions for which the approval process must be triggered. The valid values are: • Cancel • Edit Hold • Edit Trigger Date • Hold • Release Hold • Request Reinstatement • Skip Event • Trigger Event **Note:** This field appears when the **Approval Required** check box is selected.	No

2. Enter the required details in the **Approval Configuration** section.
3. If you want to add more than one approval action for an approval process *i*n a delinquency process type, click the **Add** (+) icon and then repeat step 2.

   Note: However, if you want to remove an approval action from for an approval process *i*n a delinquency process type, click the **Delete** (🗑) icon corresponding to the **Approval Action** field.

4. Click **Save**.
   The approval process is configured in a delinquency process type.

Defining a Characteristic for a Delinquency Process Type

Prerequisites

To define a characteristic for a delinquency process type, you should have:

- Characteristic types defined in the application (where the characteristic entity is set to **Delinquency Process**).

Procedure

To define a characteristic for a delinquency process type:

1. Ensure that the **Characteristics** section is expanded when you *a*re defining, editing, or copying a delinquency process type.

   The **Characteristics** section contains the following fields in a grid:

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Field Name	Field Description	Mandatory (Yes or No)
Characteristic Type	Used to indicate the characteristic type.	Yes (Conditional)
	Note: The list includes only those characteristic types where the characteristic entity is set to **Delinquency Process**.	**Note:** This field is required when you are defining a characteristic for the delinquency process type.
Characteristic Value	Used to specify the value for the characteristic type.	Yes (Conditional)
	Note: If you select a predefined characteristic type, the **Search** (🔍) icon appears corresponding to the **Characteristic Value** field. On clicking the **Search** icon, the **Predefined Characteristic Search** window appears. On specifying the value for a predefined characteristic type, the description of the characteristic value appears corresponding to the **Characteristic Value** field.	**Note:** This field is required when you are defining a characteristic for the delinquency process type.

2. Enter the required details in the **Characteristics** section.
3. If you want to define more than one characteristic for the delinquency process type, click the **Add** (+) icon and then *r*epeat step *2*.

Note: However, if you want to remove a characteristic from the delinquency process type, click the **Delete** (🗑) icon corresponding to the characteristic.

Editing a Delinquency Process Type

Prerequisites

To edit a delinquency process type, you should have:

- Delinquency event types defined in the application.
- Algorithms defined using the **C1-CUAOAB**, **C1-CANDELPRC**, **C1-MEMBDLQ**, **C1-HLDDELPRC**, **C1-RECALCHLD**, **C1-DERGRBR**, **C1-DERMLNBR**, **C1-DERTRBR**, **C1-DERWDBR**, **C1-DERTROBR**, **C1-DERMNDAYS**, and **C1-DERRTDBR** algorithm types.
- Delinquency process type business objects defined in the application.
- Delinquency process business objects defined in the application.
- Approval To Do Type and Approval To Do Role defined in the application.

Procedure

To edit a delinquency process type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **D** and then click **Delinquency Process Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Delinquency Process Type** sub-menu.
   The **Delinquency Process Type** screen appears.
4. In the **Delinquency Process Type** zone, click the **Edit** (✎) icon in the **Edit** column corresponding to the *d*elinquency process type whose details you want to edit.

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The **Delinquency Process Type** screen appears. It contains the following sections:

- **Main** - Used to specify basic details about the delinquency process type.
- **Delinquency Process Type Events** - Used to define an event for the delinquency process type.
- **Algorithms** - Used to associate an algorithm with the delinquency process type.
- **Grace Period Configuration** - Used to configure the grace period for the delinquency process type.
- **Termination and Reinstatement Configuration** - Used to configure the termination and reinstatement for the delinquency process type.
- **Termination Date Rule Priority** - Used to define the termination date rule priority for the delinquency process type.
- **Termination Reasons For Automatic Reinstatement** - Used to define the termination reason for an automatic reinstatement for the delinquency process type.
- **Trigger Date Recalculation Configuration** - Used to configure the trigger date recalculation for the delinquency process type.
- **Approval Configuration** - Used to configure an approval for the delinquency process type.
- **Characteristics** - Used to define the characteristics for the delinquency process type.

The **Main** section contains the following fields:

Field Name	**Field Description**	**Mandatory (Yes or No)**
Delinquency Process Type	Displays the delinquency process type.	Not applicable
Delinquency Entity Type	Used to specify the entity type for which the delinquency process type is created.	No
Delinquency Process Business Object	Indicates the business object using which you are defining the delinquency process type.	Yes
Description	Used to specify the description for the delinquency process type.	No
Detailed Description	Used to specify additional information about the delinquency process type.	No
Status	Used to indicate the status of the delinquency process type. The valid values are: • Active • Inactive **Note:** By default, the **Active** option is selected.	No
Collection Object	Used to indicate those bills which are overdue on the basis of bill or due date. The valid value is: • Bill **Note:** At present, the system supports **Bill** as the collection entity.	No
Automatic Termination and Reinstatement Required	Used to indicate whether automatic termination and reinstatement is required or not for the delinquency process. **Note:** At present, automatic reinstatement is not applicable for individual delinquency.	No

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Field Name	Field Description	Mandatory (Yes or No)
Delinquency Event Trigger Mode	Used to indicate the mode in which the delinquency event must be triggered. The valid values are: • Automatic • Manual • Manual or Automatic **Note:** You must specify the delinquency event trigger mode which is already defined in the system.	No
Trigger Date Calculation Mode	Used to indicate the mode in which the date calculation must be triggered. The valid values are: • Latest Bill Due Date with Grace Period • Usage Basis **Note:** By default, this field is disabled. It is enabled only when you select the **Automatic** option from the **Delinquency Event Trigger Mode** list.	Yes (Conditional) **Note:** This field is required when you select the **Automatic** option from the **Delinquency Event Trigger Mode** list.
Wait Period	Used to indicate the specific period considered for calculating the trigger dates for the events on the delinquency process. The valid values are: • Monthly Cyclic • Wait Days	Yes
Usage Basis	Used to indicate the option based on which the date calculation must be take place. The valid values are: • Delinquency Process Creation Date • Grace Start Date • Latest Bill Date • Latest Bill Due Date **Note:** By default, this field is disabled. It is enabled only when you select the **Usage Basis** option from the **Trigger Date Calculation Mode** list.	Yes (Conditional) **Note:** This field is required when you select the **Usage Basis** option from the **Trigger Date Calculation Mode** list.
Consider Work Days	Used to indicate whether you want to consider the work days for delinquency process or not.	No

Tip: Alternatively, you can edit a delinquency process type by clicking the **Edit** button in the **Delinquency Process Type** zone.

5. Enter the required details in the **Main** section.
6. Configure an event for the delinquency process type, if required.
7. Associate the required algorithms with a delinquency process type.
8. Configure the grace period for the delinquency process type, if required.
9. Configuring the automatic termination and reinstatement process in a delinquency process type, if required.
10. Set the termination date rules in a delinquency process type, if required.
11. Set the reasons for terminating an automatic reinstated membership in a delinquency process type, if required.
12. Configure the trigger date recalculation method in a delinquency process type, if required.

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13. Configure the approval process in a delinquency process type, if required.
14. Define characteristics for the delinquency process type, if required.
15. Click **Save**.
    The changes made to the delinquency process type are saved.

Related Topics

For more information on...	See...
Delinquency Process Type screen	Delinquency Process Type (Screen) on page 4222
Delinquency Process Type List zone	Delinquency Process Type List on page 4223
Delinquency Process Type zone	Delinquency Process Type on page 4224
How to configure an event for a delinquency process type	Configuring an Event for a Delinquency Process Type on page 4237
How to associate an algorithm with a delinquency process type	Associating an Algorithm with a Delinquency Process Type on page 4241
How to configure the grace period for a delinquency process type	Configuring the Grace Period for a Delinquency Process Type on page 4243
How to configure the automatic termination and reinstatement process in a delinquency process type	Configuring the Automatic Termination and Reinstatement Process in a Delinquency Process Type on page 4245
How to set the termination date rules in a delinquency process type	Setting the Termination Date Rules in a Delinquency Process Type on page 4248
How to set the reasons for termination of an automatic reinstated membership in a delinquency process type	Setting the Reasons for Termination of an Automatic Reinstated Membership in a Delinquency Process Type on page 4249
How to configure the trigger date recalculation method in a delinquency process type	Configuring the Trigger Date Recalculation Method in a Delinquency Process Type on page 4249
How to configure the approval process in a delinquency process type	Configuring the Approval Process in a Delinquency Process Type on page 4251
How to defining a characteristic for a delinquency process type	Defining a Characteristic for a Delinquency Process Type on page 4252

Deleting a Delinquency Process Type

Procedure

To delete a delinquency process type:

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1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **D** and then click **Delinquency Process Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Delinquency Process Type** sub-menu
   The **Delinquency Process Type** screen appears.
4. In the **Delinquency Process Type List** zone, click the **Delete** (🗑) icon in the **Delete** column corresponding to the *d*elinquency process type that you want to delete.

   A message appears confirming whether you want to delete the delinquency process type.

   Note: You can delete a delinquency process type when a delinquency process is not created using the delinquency process type.

   Tip: Alternatively, you can delete a delinquency process type by clicking the **Delete** button in the **Delinquency Process Type List** zone.
5. Click **OK**.
   The delinquency process type is deleted.

Related Topics

For more information on...	See...
Delinquency Process Type screen	Delinquency Process Type (Screen) on page 4222
Delinquency Process Type List zone	Delinquency Process Type List on page 4223
Delinquency Process Type zone	Delinquency Process Type on page 4224

Viewing the Delinquency Process Type Details

Procedure

To view the details of the delinquency process type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **D** and then click **Delinquency Process Type**.
   A sub-menu appears.
3. Click the **Search** option from the **Delinquency Process Type** sub-menu.
   The **Delinquency Process Type** screen appears.
4. In the **Delinquency Process Type List** zone, click the **Broadcast** (📡) icon corresponding to the delinquency process type *w*hose details you want to view.
   The **Delinquency Process Type** zone appears.
5. View the details of the delinquency process type in the **Delinquency Process Type** zone.

Related Topics

For more information on...	See...
Delinquency Process Type screen	Delinquency Process Type (Screen) on page 4222
Delinquency Process Type List zone	Delinquency Process Type List on page 4223
Delinquency Process Type zone	Delinquency Process Type on page 4224

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Delinquency Process Maintenance

Once the delinquency process is created in the **Initiated** status, the system enables you to view the details of the delinquency process. Two new screens named **Delinquency Process Search** and **Delinquency Process** are introduced in this release. The **Delinquency Process Search** screen enables you to search for a delinquency process either using the details of the delinquency process or using the details of the account, person, or membership for which the delinquency process is created.

Note: The **Person ID** field while searching for a delinquency process is only applicable for the fully insured group business.

The **Delinquency Process** screen enables you to view the details of a delinquency process. It contains the following zones:

- **Delinquency Process Details** – Display the basic details of the delinquency process.
- **Additional Attributes** – Display the characteristics of the delinquency process.
- **Bills** – Lists the overdue bills of the account for which the delinquency process is created.
- **Events** – List all events that are included in the delinquency process.
- **Event Notifications** – Lists the notifications (i.e. To Do, customer contact), if any, created for the delinquency event.
- **Approval Details** – Lists the approval records that are created while performing manual actions at the delinquency process or delinquency event level.
- **Hold Details** – Lists the hold records that are created whenever you hold the delinquency process.
- **Log** – Lists the complete trail of actions performed on the delinquency process.

Manual Actions at the Delinquency Process Level

The **Delinquency Process** screen enables you to perform the following actions at the delinquency process level:

- **Edit** – Used when you want to add additional information for the delinquency process in the form of comments or characteristics.
- **Hold** – Used when you want to manually hold the delinquency process. The **Hold** button appears only when the delinquency process is in the **Initiated**, **Delinquency In Progress**, or **Pending Termination** status. While manually holding a delinquency process, you need to specify the following:
  - A hold end date which is later than the system date
  - The reason why you want to hold the delinquency process. Note that the list includes only those reasons which are defined for the **Initiate Hold** status of the **C1-DelinquencyProcess** business object.

  The hold start date is set to the system date when you manually hold the delinquency process. On saving the changes, the status of the delinquency process is changed to the value (for example, **Initiate Hold**) specified in the **Delinquency Process Initiate Hold Status** attribute of the delinquency process preference. The system then checks whether the approval is required for the **Hold** action in the respective delinquency process type.

  If the approval is not required while manually holding the delinquency process, the status of the delinquency process is immediately changed to the value (for example, **On Hold**) specified in the **Delinquency Process Hold Status** attribute of the delinquency process preference. A hold record is created for the delinquency process in the **Active** status. However, if the approval is required while manually holding the delinquency process, an approval record is created in the **Approval In Progress** status. A To Do is created using the approval To Do type to approve the manual hold and assigned to the users with the approval To Do role. In addition, the status of the delinquency process is changed to the value (for example, **Delinquency In Progress – Exception Raised**) specified in the **Delinquency Process Approval In Progress Status** attribute of the delinquency process preference. Note that the system continues to trigger the delinquency events on the trigger date even when the approval is in progress until the approver approves the manual hold.

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If the approver approves the manual hold, the status of the delinquency process is changed to the value (for example, **On Hold**) specified in the **Delinquency Process Hold Status** attribute of the delinquency process preference. In addition, the system does the following:

- The hold start date is changed to the date when the approver approves the manual hold.
- The status of the approval record is changed to **Approved**.
- A hold record is created for the delinquency process in the **Active** status.

However, if the approver rejects the manual hold, the status of the approval record is changed to **Rejected** and the status of the delinquency process is changed to its previous status (i.e. **Initiated**, **Delinquency In Progress**, or **Pending Termination**).

- **Cancel** – Used when you want to manually cancel the delinquency process. The **Cancel** button appears only when the delinquency process is in the **Initiated**, **Delinquency In Progress**, or **On Hold** status. While manually canceling a delinquency process, you need to specify the cancel reason and comments, if any. You must specify a reason which is defined for the **Initiate Cancel** status of the **C1-DelinquencyProcess** business object in the **Status Reason** screen.

  On manually canceling a delinquency process, the status of the delinquency process is set to the value (for example, **Initiate Cancel**) specified in the **Delinquency Process Initiate Cancel Status** attribute of the delinquency process preference. The system then checks whether the approval is required for the **Cancel** action in the respective delinquency process type. If the approval is not required while manually canceling the delinquency process, the status of the delinquency process is changed to the value (for example, **Canceled**) specified in the **Delinquency Process Canceled Status** attribute of the delinquency process preference.

  However, if the approval is required while manually canceling the delinquency process, an approval record is created in the **Approval In Progress** status. A To Do is created using the approval To Do type to approve the manual cancellation and assigned to the users with the approval To Do role.

  In addition, the status of the delinquency process is changed to the value (for example, **Delinquency In Progress – Exception Raised**) specified in the **Delinquency Process Approval In Progress Status** attribute of the delinquency process preference. Note that the system continues to trigger the delinquency events on the trigger date even when the approval is in progress until the approver approves the manual cancellation of the delinquency process.

  If the approver approves the manual cancellation of the delinquency process, the status of the delinquency process is set to the value (for example, **Canceled**) specified in the **Delinquency Process Canceled Status** attribute of the delinquency process preference. In addition, the status of the approval record is changed to **Approved**. However, if the approver rejects the manual cancellation of the delinquency process, the status of the approval record is changed to **Rejected** and the status of the delinquency process is changed to its previous status (i.e. **Initiated**, **Delinquency In Progress**, or **On Hold**).
- **Release** – Used when you want to manually release the hold on the delinquency process. The **Release** button appears only when the delinquency process is in the **On Hold** status. While manually releasing the hold on the delinquency process, you are prompted to confirm the hold release. On confirming the hold release, the status of the delinquency process is changed to the value (for example, **Initiate Release**) specified in the **Delinquency Process Initiate Release Status** attribute of the delinquency process preference. The system then checks whether the approval is required for the **Release Hold** action in the respective delinquency process type. If the approval is not required while manually releasing the hold on the delinquency process, the status of the delinquency process is immediately changed to its previous status (i.e. **Initiated**, **Delinquency In Progress**, or **Pending Termination**). In addition, the hold end date is set to the date when you manually release the hold on the delinquency process. Finally, the status of hold record is changed to **Completed**.

  However, if the approval is required while manually releasing the hold on the delinquency process, an approval record is created in the **Approval In Progress** status. A To Do is created using the approval To Do type to approve the manual hold release and assigned to the users with the approval To Do role. In addition, the status of the delinquency process is changed to the value (for example, **Delinquency In Progress – Exception Raised**) specified in the **Delinquency Process Approval In Progress Status** attribute of the delinquency process preference. If the approver approves the hold release, the status of the delinquency process is changed to its previous status (i.e. **Initiated**, **Delinquency In Progress**, or **Pending Termination**). The hold end date is set to the date when the approver approves the hold release. In addition, the status of the approval record is changed to **Approved** and the status of hold record is changed to **Completed**. However, if the approver rejects the hold release, the status of the approval record is changed to **Rejected** and the status of the delinquency process is changed to its previous status (i.e. **On Hold**).

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- **Request Reinstatement** – This button is not applicable for the delinquency processes which are created for the fully insured individual business.
- **Edit Hold** – On clicking the **Edit** icon corresponding to the hold record of the delinquency process, you can edit the hold end date and hold reason. Note that the **Edit** icon appears only when following conditions are met:
  - The delinquency process is in the **On Hold** status.
  - The delinquency process is kept on hold manually and not automatically.
  - The hold record is in the **Active** status.

  While editing the hold details, you can specify the following:
  - A hold end date which is later than the system date and which is later than the date which is the latest of the following:
    - Postpone credit review date
    - Latest schedule date specified in the payment agreement request
    - Latest schedule date specified among all the active promise to pay
  - The reason why you want to hold the delinquency process. Note that the list includes only those reasons which are defined for the **Initiate Hold** status of the **C1-DelinquencyProcess** business object.

  On saving the changes, the system checks whether the approval is required for the **Edit Hold** action in the respective delinquency process type. If the approval is not required while manually editing the hold details, the hold end date and hold reason of the delinquency process are updated immediately.

  However, if the approval is required while manually editing the hold details, an approval record is created in the **Approval In Progress** status. A To Do is created using the approval To Do type to approve the changes and assigned to the users with the approval To Do role. The status of the delinquency process remains as **On Hold**. If the approver approves the changes, the hold end date and hold reason of the delinquency process are updated. In addition, the status of the approval record is changed to **Approved**. However, if the approver rejects the hold changes, the status of the approval record is changed to **Rejected** and the hold changes are not reflected in the delinquency process.

Note:

The system considers the delinquency process preference which is specified in the **Delinquency Process Field Mapping** option type of the **DELINPROC** feature configuration. For more information about the feature configuration, see Setting the DELINPROC Feature Configuration on page 4442.

If the required attributes are not defined in the delinquency process preference, erroneous results will occur.

The system considers the approval To Do type and approval To Do role specified in the respective delinquency process type. If the approval To Do role is not specified in the respective delinquency process type, the system considers the default To Do role associated with the approval To Do type.

Manual Actions at the Delinquency Event Level

You can also perform the following actions for each delinquency event of the delinquency process from the **Delinquency Process** screen:

- **Edit Trigger Date** – On clicking the **Edit Trigger Date** icon corresponding to a delinquency event, you can specify a new trigger date for the delinquency event. Note that the **Edit Trigger Date** icon appears only when the following conditions are met:
  - The delinquency process is in the **Initiated** or **Delinquency In Progress** status
  - The delinquency event trigger mode is set to **Manual** or **Automatic** in the respective delinquency process type
  - The delinquency event is in the **Pending** status

  Once you specify the new trigger date and save the changes, the system checks whether the approval is required for the **Edit Trigger Date** action in the respective delinquency process type. If the approval is not required while manually editing the trigger date, the trigger date of the delinquency event is updated immediately.

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However, if the approval is required while manually editing the trigger date, an approval record is created for the delinquency event in the **Approval In Progress** status. A To Do is created using the approval To Do type to approve the changes and assigned to the users with the approval To Do role. Note that the icons in the **Trigger Events** and **Skip Event** columns (if any) corresponding to the delinquency event are removed immediately, so that users should not be able to perform any other actions on the delinquency event. The status of the delinquency process remains as **Initiated** or **Delinquency In Progress**. Note that the system continues to trigger the delinquency events on the trigger date even when the approval is in progress. If a delinquency event is triggered before the approval is received for the delinquency event, the status of the approval record is changed to **Expired**.

If the approver approves the changes, the trigger date of the delinquency event is updated. The icons in the **Trigger Events** and **Edit Trigger Date** columns (if any) corresponding to the delinquency event are displayed again. In addition, the status of the approval record is changed to **Approved**. However, if the approver rejects the changes, the status of the approval record is changed to **Rejected** and the trigger date of the delinquency event is not updated. However, the icons in the **Trigger Events** and **Edit Trigger Date** columns (if any) corresponding to the delinquency event are displayed again.

- **Skip Event** – On clicking the **Skip Event** icon corresponding to a delinquency event, the system checks whether the approval is required for the **Skip Event** action in the respective delinquency process type. Note that the **Skip Event** icon appears only when the following conditions are met:
  - The delinquency process is in the **Initiated** or **Delinquency In Progress** status
  - The delinquency event trigger mode is set to **Manual** or **Manual or Automatic** in the respective delinquency process type
  - The delinquency event is in the **Pending** status

  If the approval is not required while manually skipping the delinquency events, the status of the delinquency event is changed to **Skipped** immediately. In addition, the icons in the **Trigger Events** and **Edit Trigger Date** columns (if any) corresponding to the delinquency event are also removed. However, if the approval is required while manually skipping the delinquency events, an approval record is created for the delinquency event in the **Approval In Progress** status. A To Do is created using the approval To Do type to approve the changes and assigned to the users with the approval To Do role. Note that the icons in the **Trigger Events** and **Edit Trigger Date** columns (if any) corresponding to the delinquency event are removed immediately, so that users should not be able to perform any other actions on the delinquency event.

  The status of the delinquency process remains as **Initiated** or **Delinquency In Progress**. Note that the system continues to trigger the delinquency events on the trigger date even when the approval is in progress. If a delinquency event is triggered before the approval is received for the delinquency event, the status of the approval record is changed to **Expired**.

  If the approver approves the skip action, the status of the delinquency event is changed to **Skipped** immediately. In addition, the status of the approval record is changed to **Approved**. Note that the icons in the **Trigger Events** and **Edit Trigger Date** columns corresponding to the delinquency event are not displayed again. However, if the approver rejects the skip action, the status of the approval record is changed to **Rejected**. The status of the delinquency event remains as **Pending**. In addition, the icons in the **Trigger Events** and **Edit Trigger Date** columns (if any) corresponding to the delinquency event are displayed again.
- **Trigger Event** - On clicking the **Trigger Event** icon corresponding to a delinquency event, the system checks whether the approval is required for the **Trigger Event** action in the respective delinquency process type. Note that the **Trigger Event** icon appears only when the following conditions are met:
  - The delinquency process is in the **Initiated** or **Delinquency In Progress** status
  - The delinquency event trigger mode is set to **Manual** or **Manual or Automatic** in the respective delinquency process type
  - The delinquency event is in the **Pending** status

  If the approval is not required while manually triggering the delinquency events, the algorithms attached to the **Event Activation** system event of the respective delinquency event type are executed immediately in the specified order. The status of the delinquency event is changed to **Completed** when all algorithms attached to the **Event Activation** system event are successfully executed. In addition, the icons in the **Skip Event** and **Edit Trigger Date** columns (if any) corresponding to the delinquency event are also removed. However, if the approval is required

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while manually triggering the delinquency events, an approval record is created for the delinquency event in the **Approval In Progress** status. A To Do is created using the approval To Do type to approve the changes and assigned to the users with the approval To Do role. Note that the icons in the **Skip Event** and **Edit Trigger Date** columns (if any) corresponding to the delinquency event are removed immediately, so that users should not be able to perform any other actions on the delinquency event.

The status of the delinquency process remains as **Initiated** or **Delinquency In Progress**. Note that the system continues to trigger the delinquency events on the trigger date even when the approval is in progress. If a delinquency event is triggered before the approval is received for the delinquency event, the status of the approval record is changed to **Expired**. If the approver approves the manual trigger action, the algorithms attached to the **Event Activation** system event of the respective delinquency event type are executed immediately in the specified order.

The status of the delinquency event is changed to **Completed** when all algorithms attached to the **Event Activation** system event are successfully executed. In addition, the status of the approval record is changed to **Approved**. Note that the icons in the **Skip Event** and **Edit Trigger Date** columns corresponding to the delinquency event are not displayed again. However, if the approver rejects the manual trigger action, the status of the approval record is changed to **Rejected**. The status of the delinquency event remains as **Pending**. In addition, the icons in the **Skip Event** and **Edit Trigger Date** columns (if any) corresponding to the delinquency event are displayed again.

Note that the algorithms attached to the **Monitor Completed Event** system event of the respective delinquency event type are not executed in the online mode when the status of the delinquency event is changed to **Completed**. These algorithms are executed when you invoke the **C1-DPMON** batch.

Whenever you manually execute the subsequent events (non-first event) in the delinquency process, the system first checks whether the algorithms attached to the **Monitor Completed Event** system event of the previous delinquency event is successfully executed or not. If an algorithm attached to the **Monitor Completed Event** system event of the previous delinquency event is not executed successfully, the system displays a warning message that indicates the previous event's monitoring algorithms are not executed successfully and confirms whether you want to continue in such scenario. If you click **Yes**, the system ignores the previous event's monitoring algorithm and executes the algorithms attached to the **Event Activation** system event of the current delinquency event (which is triggered). However, if you click **No**, the system does not execute the algorithms attached to the **Event Activation** system event of the current delinquency event. Note that if there are no algorithms attached to the **Monitor Completed Event** system event of the previous delinquency event, the system will directly execute the algorithms attached to the **Event Activation** system event of the current delinquency event.

Note: The system considers the approval To Do type and approval To Do role specified in the respective delinquency process type. If the approval To Do role is not specified in the respective delinquency process type, the system considers the default To Do role associated with the approval To Do type.

Delinquency Process (Used for Searching)

The **Delinquency Process** screen allows you to search for a delinquency process using various search criteria. It contains the following zone:

- Search Delinquency Process on page 4262

Through this screen, you can navigate to the following screen:

- Delinquency Process (Used for Viewing) on page 4267

Search Delinquency Process

The **Search Delinquency Process** zone allows you to search for a delinquency process using various search criteria. It contains the following two sections:

- **Search Criteria** - The **Search Criteria** section contains the following fields:

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Field Name	Field Description	Mandatory (Yes or No)
Search By	Used to indicate whether you want to search for a delinquency process using the process details, or person, or account, or membership details. The valid values are: • Process Details • Person/Account/Membership Details **Note:** By default, the **Process Details** option is selected.	Yes
Delinquency Process ID	Used to search a delinquency process using the delinquency process ID. **Note:** This field appears when the **Process Details** option is selected from the **Search By** list.	No
Delinquency Process Type	Used to search delinquency processes with a particular delinquency process type.	No
Delinquency Event Type	Used to search delinquency processes with a particular delinquency event type. **Note:** This field appears when the **Process Details** option is selected from the **Search By** list.	No
Status	Used to search delinquency processes with a particular status. The valid values are: • Canceled • Completed • On Hold • Initiated • Delinquency In Progress • Pending Reinstatement • Pending Termination • Customer Reinstated • Reinstatement Payment/Adjustment Canceled • Automatic Reinstatement Stopped • Request Reinstatement • Customer Terminated	No
Event Preview Status	Used to search delinquency processes with a particular event preview status. The valid values are: • Completed • In Progress • Not Required • Pending • Pending Evaluation **Note:** This field appears when the **Process Details** option is selected from the **Search By** list.	No

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Field Name	Field Description	Mandatory (Yes or No)
Created From	Used to search delinquency processes which are created from a particular date onwards.	No
Created To	Used to search delinquency processes which are created till a particular date.	No
Collection Class	Used to search delinquency processes with a particular collection class. **Note:** This field appears when the **Process Details** option is selected from the **Search By** list.	No
Person ID	Used to search delinquency processes which are created for a specific person. **Note:** The **Search** (🔍) icon appears corresponding to the **Person ID** field. On clicking the **Search** (🔍) icon, the **Person Search** window appears. On specifying the person, the description of the person appears corresponding to the **Person ID** field. This field appears when the **Person/Account/Membership Details** option is selected from the **Search By** list. It has a link. On clicking the link, the **Person** screen appears, where you can view the details of the respective person.	No
Account ID	Used to search delinquency processes which are created for a specific account. **Note:** The **Search** (🔍) icon appears corresponding to the **Account ID** field. On clicking the **Search** (🔍) icon, the **Account Search** window appears. On specifying the person, the description of the account appears corresponding to the **Account ID** field. This field appears when the **Person/Account/Membership Details** option is selected from the **Search By** list. It has a link. On clicking the link, the **Account** screen appears, where you can view the details of the respective account.	No
Membership ID	Used to search delinquency processes which are created for a specific membership. **Note:** The **Search** (🔍) icon appears corresponding to the **Membership ID** field. On clicking the **Search** (🔍) icon, the **Search Membership** window appears. This field appears when the **Person/Account/Membership Details** option is selected from the **Search By** list.	No

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Note: You must specify at least one search criterion while searching for a delinquency process.

- **Search Results** - On clicking the **Search** button, the search results appear based on the specified search criteria. The **Search Results** section contains the following columns:

Column Name	Column Description
Delinquency Process Information	Displays information about the delinquency process. **Note:** It has a link. On clicking the link, the **Delinquency Process** screen appears where you can view the details of the respective delinquency process.
Person Identifier	Indicates the person identifier associated with the delinquency process.
Person Name	Indicates the person associated with the delinquency process.
Delinquency Entity	Indicates the entity for which the delinquency process is created.
Create Date/Time	Displays the date and time when the delinquency process is created.
Status	Indicates the status of the delinquency process. The valid values are: • Canceled • Completed • On Hold • Initiated • Delinquency In Progress • Pending Reinstatement • Pending Termination • Customer Reinstated • Reinstatement Payment/Adjustment Canceled • Automatic Reinstatement Stopped • Request Reinstatement • Customer Terminated
Cancel	On clicking the **Cancel** ( ) icon, the **Initiate Cancellation of Delinquency Process** screen appears where you can specify the details why you want to initiate cancelation of the selected delinquency process.
Request Reinstatement	On clicking the **Request Reinstatement** ( ) icon, the **Initiate Reinstate for Delinquency Process** screen appears where you can specify the reason why you want to initiate reinstatement of the group membership. **Note:** This icon appears only when the delinquency process is created for a group membership.
Hold	On clicking the **Hold** ( ) icon, the **Initiate Hold for Delinquency Process** screen appears where you can specify the details why you want to initiate hold for the selected delinquency process.
Release	On clicking the **Release** ( ) icon, the **Initiate Release for Delinquency Process** screen appears where you can specify the details why you want to initiate release for the selected delinquency process.
Delinquency Process ID	Displays the delinquency process ID.

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Note:

Pagination is used to display limited number of records in the **Search Results** section. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

You can filter the list using various search criteria (such as, **Delinquency Process ID**, **Delinquency Process Type**, **Delinquency Event Type**, **Status**, **Event Preview Status**, **Created From**, **Created Until**, and **Collection Class**) available in the **Filter** area. You can view the **Filter** area by clicking the **Filters** (▽) icon in the upper right corner of this zone.

Searching for a Delinquency Process

Prerequisites

To search for a delinquency process, you should have:

- Delinquency process business object defined in the application.
- Delinquency process types defined in the application.
- Delinquency event types defined in the application.

Procedure

To search for a delinquency process:

1. Click the **Menu** link in the **Application** toolbar.
   A list appears.
2. From the **Main** menu, select **Delinquency Management** and then click **Delinquency Process**.
   The **Delinquency Process** screen appears.
3. Enter the search criteria in the **Search Delinquency Process** zone.

   Note: ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.
4. Click **Search**.
   A list of delinquency processes that meet the search criteria appears in the **Search Results** section.

Related Topics

For more information on...	See...
Delinquency Process screen	Delinquency Process (Used for Searching) on page 4262
Search Delinquency Process zone	Search Delinquency Process on page 4262

Viewing the Delinquency Process Details

Procedure

To view the details of a delinquency process:

1. Search for the delinquency process in the **Delinquency Process** screen.
2. In the **Search Results** section, click the link in the **Delinquency Process Information** column corresponding to *t*he delinquency process whose details you want to view.

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The **Delinquency Process** screen appears.

3. View the details of the delinquency process in the **Delinquency Process Details** zone.

Related Topics

For more information on...	See...
Delinquency Process screen	Delinquency Process (Used for Searching) on page 4262
Search Delinquency Process zone	Search Delinquency Process on page 4262
Delinquency Process Details zone	Delinquency Process Details on page 4267

Delinquency Process (Used for Viewing)

The **Delinquency Process** screen allows you to:

- Edit the details of a delinquency process
- View the additional attributes of a delinquency process
- View the bills of a delinquency process
- View the events of a delinquency process
- View the approval details of a delinquency process
- View the hold details of a delinquency process
- Approve or reject the manual actions performed on a delinquency process
- Withdraw the manual actions performed on a delinquency process
- Cancel a delinquency process
- Hold a delinquency process
- Release a delinquency process
- Request reinstatement of a delinquency process for a group membership

> **Note:** Reinstatement is not applicable for **Individual Delinquency** purposes.

- View the log of a delinquency process
- Add a log entry for a delinquency process

It consists of the following zones:

- Delinquency Process Details on page 4267
- Additional Attributes on page 4269
- Bills on page 4269
- Events on page 4270
- Event Notifications on page 4271
- Approval Details on page 4272
- Hold Details on page 4273
- Log on page 4273

Delinquency Process Details

The **Delinquency Process Details** zone displays the details of the delinquency process. It contains the following fields:

Field Name	Field Description
Delinquency Process ID	Displays the delinquency process ID.

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Field Name	Field Description
Delinquency Process Type	Indicates the delinquency process type using which the delinquency process is created.
Delinquency Entity	Indicates the entity for which the delinquency process is created.
Collection Class	Indicates the collection class of a person or an account for the delinquency process.
Grace Period (In Days)	Displays the number of days which are used to define the grace period end date for the delinquency process. **Note:** For example, if a delinquency process contains bills with the latest bill due date as 01-Jan-2023, the system considers the latest bill due date as the grace period start date which is 01-Jan-2023. Now, if you have configured the grace period as 30 days, the system determines the grace period end date as 31-Jan-2023 by using the following formula: `Grace Period End Date = Grace Period Start Date ' + Grace Period`
Grace Start Date	Indicates the date from when the grace period is effective for the delinquency process.
Grace End Date	Indicates the date till when the grace period is effective for the delinquency process.
Delinquency Due Date	Indicates the earliest bill due date from when the delinquency process is created.
Termination Date Rule	Indicates the termination date rule used for calculating the termination effective date.
Termination Trigger Date	Indicates the date on which the termination of an individual membership is triggered.
Termination Date	Indicates the date from when the termination is effective. **Note:** Termination can take place in retro as well as in advance.
Termination Reason	Indicates the reason for initiating the termination process.
Status	Indicates the status of the delinquency process. The valid values are: • Canceled • Completed • On Hold • Initiated • Delinquency In Progress • Pending Reinstatement • Pending Termination • Customer Reinstated • Reinstatement Payment/Adjustment Canceled • Automatic Reinstatement Stopped • Request Reinstatement • Customer Terminated

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Field Name	Field Description
Comments	Displays the comments added for the delinquency process.
Reinstatement Trigger Date	Indicates the date on which reinstatement is triggered.
Automatic Reinstatement Count	Displays the maximum number of times reinstatement happens systematically.

Additional Attributes

The **Additional Attributes** zone displays additional details of the delinquency process. It contains the following columns:

Column Name	Column Description
Effective Date	Displays the date from when the characteristic is effective for the delinquency process.
Characteristic Type	Indicates the characteristic type for the delinquency process.
Characteristic Value	Displays the value of the characteristic type.
Description	Displays the description of the characteristic type.

You can filter the list using search criteria (such as, **Effective Date**) available in the **Filter** area. By default, the **Filter** area is hidden. You can view the **Filter** area by clicking the **Filters** (▽) icon in the upper right corner of this zone.

Bills

The **Bills** zone displays the bills that are added in the delinquency process. It contains the following columns:

Column Name	Column Description
Bill ID	Displays the bill ID. **Note:** It has a link. On clicking the link, the **Bill** screen appears where you can view the details of the respective bill.
Bill Date	Displays the date when the bill was generated.
Due Date	Displays the date when the bill is due for payment.
Status	Indicates the status of the bill. The valid values are: • Pending • Complete
Original Amount	Displays the bill amount.
Outstanding Amount	Displays the unpaid amount of the bill.
Account Information	Indicates the account for which the bill is generated. In addition, a context menu appears corresponding to this field which helps in navigating to other screens in the application. **Note:** It has a link. On clicking the link, the **Account** screen appears where you can view the details of the respective account.

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Note: Pagination is used to display limited number of records in this zone. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

Events

The **Events** zone displays the events that are created in the delinquency process. It contains the following columns:

Column Name	Column Description
Trigger Date	Displays the trigger date of the event.
Delinquency Event Type	Displays the delinquency event type. **Note:** It has a link. On clicking the link, the **Delinquency Event Type** screen appears where you can view the details of the delinquency event type.
Event Status	Indicates the event status. The valid values are: • Completed • Pending • Pending Evaluation • Pending Contact Creation • Skipped
Preview Date	Displays the date from when the preview status of the event is set to **In Progress**. **Note:** The event's preview status remains as **In Progress** till the event is triggered. Once the event is triggered, the event's preview status is updated to **Completed**. The system calculates the preview date based on preview days. The preview date is calculated using the following formula: `Preview Date = Trigger Date -- Preview Days`
Event Preview Status	Indicates the preview status of the event. The valid values are: • Completed • In Progress • Not Required • Pending Evaluation • Pending
Status Update	Displays the date when the status of the event was last updated.
Trigger Events	On clicking the **Trigger Event** (⏻) icon, the following process takes place: The system invokes the **Monitor Completed Event** algorithm of the last completed event, if there is any. If the **Monitor Completed Event** algorithm returns with a false value, the system displays a warning message with a confirmation dialog box. If you click **Yes**, the system simply triggers the current event. If there are no pending events or if the last completed event does not contain the **Monitor Completed Event** algorithm, the system triggers the current event. Now, while triggering the event, the system performs the following actions:

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Column Name	Column Description
	• The **Event Activation** algorithm is invoked. • The event status is updated from **Pending** to **Completed**. • The **Status Update** column is updated with the processing date and user ID.
Skip Event	On clicking the **Skip Event** ( ) icon, the system performs the following actions: • The event status is updated from **Pending** to **Skipped**. • The **Status Update** column is updated with the processing date and user ID.
Edit Trigger Date	On clicking the **Edit Trigger Date** ( ) icon, the **Delinquency Process Update Event Trigger Date** screen appears where you can set the new trigger date.
Approval In Progress	Indicates whether the event is assigned to an approver for an approval. The valid values are: • Yes • No

Event Notifications

The **Event Notifications** zone displays the notifications that are created for an event. It contains the following columns:

Column Name	Column Description
Notification Type	Indicates the type of notification sent when the event is triggered. The valid values are: • To Do • Customer Contact
Notification Information	Displays information about the notification. The system behaves in the following way:

If...	Then...
Notification Type is **To Do**	On clicking the link, the **To Do Entry** screen appears where you can view the details of the respective To Do.
Notification Type is **Customer Contact**	On clicking the link, the **Customer Contact** screen appears where you can view the details of the respective customer.

Note:

If a delinquency event type is created for terminating an individual membership, the system creates an outbound message whenever the respective event is triggered. Simultaneously, the system also creates an entry related to the outbound message in the **Log** zone.

The **Events Notifications** zone does not appear by default. It appears when you click the **Broadcast** ( ) icon corresponding to an event in the **Events** zone.

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Approval Details

The **Approval Details** zone displays the approval information for the delinquency process. It contains the following columns:

Column Name	Column Description
Created By Info	Displays the user who has created an approval entry.
Approval Action	Indicates the action taken by an approver on the approval entry. The valid value is: • Cancel • Edit Hold • Edit Trigger Date • Hold • Request Reinstatement • Release Hold • Skip Event • Trigger Event
Delinquency Event Type	Displays the delinquency event type of the event for which an approval is requested.
Status	Indicates the current status of an approval request. The valid values are: • Approval In Progress • Approved • Rejected • Withdrawn • Expired
Status Update	Displays the date and time when the approval request is updated.
Comments	On clicking the **Comments** (✎) icon, the **Delinquency Process Approval Information** screen appears where you can specify additional comments for the delinquency process.
View	On clicking the **View** (🔍) icon, the **Delinquency Process Approval Information** window appears displaying the approval details. **Note:** You can also approve or reject the approval entry through this screen.
Approve	On clicking the **Approve** (✓) icon, the **Confirmation** window appears where you approve the approval entry. **Note:** The **Approve** icon appears only for those users who have a specified To Do Role.
Reject	On clicking the **Reject** (✗) icon, the **Confirmation** window appears where you reject the approval entry. **Note:** The **Reject** icon appears only for those users who have a specified To Do Role.
Withdraw	On clicking the **Withdraw** (↩) icon, the **Confirmation** window appears where you can withdraw the approval entry. **Note:** The **Withdraw** icon appears only for those users who have a specified To Do Role.
To Do	Displays the To Do that is generated when the approver when an approval request is created.

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Column Name	Column Description
	Note: It contains a link. On clicking the link, the **To Do Entry** screen appears where you can view the details of the respective To Do.

You can filter the list using **Delinquency Process Approval Status** and **Approval Action** available in the **Filter** area. By default, the **Filter** area is hidden. You can view the **Filter** area by clicking the **Filters** (▽) icon in the upper right corner of this zone.

Note: The information in this zone appears only when **Approval Required** option is selected while creating a delinquency process type.

Hold Details

The **Hold Details** zone lists the active delinquency process hold records that are kept on hold. It contains the following columns:

Column Name	Column Description
Hold Start Date	Displays the date from when the hold is effective for the delinquency process.
Hold End Date	Displays the date till when the hold is effective for the delinquency process.
Hold Reason	Indicates the reason for releasing the hold from the delinquency process.
Delinquency Process Hold Status	Indicates the status of the record on hold. The valid value is: • Active • Completed
Creation Mode	Indicates the mode in which the delinquency process hold record is created. The valid values are: • Automatic • Manual
Edit	On clicking the **Edit** (✎) icon, the **Delinquency Process Hold Information** screen appears where you can edit the hold details.

Note: This zone displays only those records that have the **Delinquency Process Hold Status** set to **Active**.

Log

The **Log** zone lists the complete trail of actions performed on the delinquency process. It contains the following columns:

Column Name	Column Description
Creation Date Time	Displays the date and time when the action was performed on the delinquency process.
Details	Displays the details about the action performed on the delinquency process.
User	Indicates the user who has performed the action on the delinquency process.
Log Type	Indicates the type of log.

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Column Name	Column Description
Related Object	Indicates the object or entity which is created when the action is performed on the delinquency process.
Status Reason	Indicates the reason why the offset request is rejected or unapplied (i.e. canceled).

Note: You can manually add a log entry for the offset request by clicking the **Add Log Entry** link in the upper right corner of the **Log** zone.

Editing a Delinquency Process

Prerequisites

To edit a delinquency process, you should have:

- Delinquency control defined in the application
- Delinquency event type defined in the application
- Delinquency process type and delinquency process business objects defined in the application

Procedure

To edit a delinquency event type:

1. Search for the delinquency process in the **Delinquency Process Search** screen.
2. In the **Search Results** section, click the link in the **Delinquency Process Information** column corresponding to the *d*elinquency process whose details you want to edit.
   The **Delinquency Process** screen appears.
3. Click the **Edit** button in the upper right corner of the **Delinquency Process Information** section.

   The **Delinquency Process** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details about the delinquency process. This section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Delinquency Process	Displays information about the delinquency process.	Not applicable
Delinquency Process Type	Indicates the delinquency process type using which the delinquency process is created.	Not applicable
Delinquency Entity	Indicates the entity for which the delinquency process is created.	Not applicable
Termination Trigger Date	Used to specify the trigger date for terminating the individual membership. **Note:** The Termination Trigger Date is calculated by the event activation algorithm configured on the event which terminates the individual membership. This field appears only when the termination trigger date is configured on the respective event.	No
Comments	Used to specify additional information about the delinquency process.	No

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- **Characteristics** - Used to define the characteristics for the delinquency process. This section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Effective Date	Used to indicate the date from when the delinquency process is effective.	No
Characteristic Type	Used to indicate the characteristic type for the delinquency process.	Yes (Conditional)
	Note: The list includes only those characteristic types where the characteristic entity is set to **Delinquency Process**.	**Note:** This field is required when you are editing the delinquency process details.
Characteristic Value	Used to specify the value for the characteristic type.	Yes (Conditional)
	Note: On specifying the value for a predefined characteristic type, the description of the characteristic value appears corresponding to the **Characteristic Value** field.	**Note:** This field is required when you are editing the delinquency process details.

Note: The **Edit** button appears when the status of the delinquency process is either **Initiated**, **Delinquency In Progress**, or **On Hold**.

4. Enter the required details in the **Main** section.
5. Define characteristics for the delinquency process, if required.
6. If you want to define more than one characteristic for the delinquency process, click the **Add** (+) icon and then *r*epeat step *5*.

Note: However, if you want to remove a characteristic from the delinquency process, click the **Delete** (🗑) icon corresponding to the characteristic.

7. Click **Save**.
   The changes made to the delinquency process are saved.

Holding a Delinquency Process

Prerequisites

To hold a delinquency process, you should have:

- Status reasons defined in the application.

Procedure

To hold a delinquency process:

1. Search for the delinquency process in the **Delinquency Process Search** screen.
2. In the **Search Results** section, click the link in the **Delinquency Process Information** column corresponding to the *d*elinquency process that you want to hold.
   The **Delinquency Process** screen appears.
3. Click the **Hold** button in the upper right corner of the **Delinquency Process Information** section.

   The **Initiate Hold for Delinquency Process** window appears. It contains the following fields:

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Field Name	Field Description	Mandatory (Yes or No)
Delinquency Process Information	Displays information about the delinquency process.	Not applicable
Hold Start Date	Used to indicate the date from when the hold is effective for the delinquency process. **Note:** The hold start date cannot be greater than the hold end date. By default, the system date appears in this field.	Not applicable
Hold End Date	Used to indicate the date till when the hold is effective for the delinquency process. **Note:** The hold end date cannot be earlier than the hold start date	Yes
Status Reason	Used to indicate the reason why you want to hold the delinquency process.	Yes
Comments	Used to specify additional information about the hold.	No

Tip: Alternatively, you can hold a delinquency process by clicking the **Hold** icon in the **Hold** column corresponding to the delinquency process.

Note: The **Hold** button appears when the status of the delinquency process is either **Initiated**, **Delinquency In Progress**, or **Pending Termination**.

4. Select the reason for hold from the **Status Reason** list.
5. Enter the comments in the **Comments** field, if required.
6. Click **Save**.
   The status of the delinquency process is changed to **On Hold**.

Related Topics

For more information on...	See...
How to search for a delinquency process	Searching for a Delinquency Process on page 4266
Delinquency Process screen	Delinquency Process (Used for Viewing) on page 4267

Canceling a Delinquency Process

Prerequisites

To cancel a delinquency process, you should have:

- Cancelation reasons defined in the application.

Procedure

To cancel a delinquency process:

1. Search for the delinquency process in the **Delinquency Process Search** screen.

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2. In the **Search Results** section, click the link in the **Delinquency Process Information** column corresponding to the *d*elinquency process that you want to cancel.
   The **Delinquency Process** screen appears.
3. Click the **Cancel** button in the upper right corner of the **Delinquency Process Information** section.

   The **Initiate Cancel for Delinquency Process** window appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Delinquency Process Information	Displays information about the delinquency process.	Not applicable
Status Reason	Used to indicate the reason why you want to cancel the delinquency process.	Yes
Comments	Used to specify additional information while canceling the delinquency process.	No

Tip: Alternatively, you can cancel a delinquency process by clicking the **Cancel** (⌫) icon in the **Cancel** column *c*orresponding to the delinquency process.

Note: The **Cancel** button appears when the status of the delinquency process is either **Initiated**, **Delinquency In Progress**, or **On Hold**.

4. Select the cancelation reason from the **Status Reason** list.
5. Enter the comments in the **Comments** field, if required.
6. Click **Save**.
   The status of the delinquency process is changed to **Canceled**.

Related Topics

For more information on...	See...
How to search for a delinquency process	Searching for a Delinquency Process on page 4266
Delinquency Process screen	Delinquency Process (Used for Viewing) on page 4267

Adding a Log Entry for a Delinquency Process

Procedure

To add a log entry for a delinquency process:

1. Search for the delinquency process in the **Delinquency Process Search** screen.
2. In the **Search Results** section, click the link in the **Delinquency Process Information** column corresponding to the *d*elinquency process for which you want to add a log entry.
   The **Delinquency Process** screen appears.
3. Click the **Add Log Entry** link in the upper right corner of the **Log** zone.

   The **Add Delinquency Process Log** window appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Delinquency Process Information	Displays information about the delinquency process.	Not applicable

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Field Name	Field Description	Mandatory (Yes or No)
Log Details	Used to specify additional comments for the delinquency process.	Yes

4. Enter the comments in the **Log Details** field.
5. Click **Save**.
   The log entry is added in the **Log** zone.

Related Topics

For more information on...	See...
How to search for a delinquency process	Searching for a Delinquency Process on page 4266
Delinquency Process Search screen	Delinquency Process (Used for Searching) on page 4262
Log zone	Log on page 4273

Triggering an Event in a Delinquency Process

Prerequisites

To trigger an event in a delinquency process, you should have:

- Delinquency event types defined in the application.

Procedure

To trigger an event in a delinquency process:

1. Search for the delinquency process in the **Delinquency Process Search** screen.
2. In the **Search Results** section, click the link in the **Delinquency Process Information** column corresponding to the *d*elinquency process whose event you want to trigger.
   The **Delinquency Process** screen appears.
3. Expand the **Events** zone.
4. Click the **Trigger Events** (⏻) icon in the **Trigger Events** column *c*orresponding to the event which you want to trigger.

   The system performs the following set of actions:

   - The respective **Event Activation** algorithm is invoked.
   - The event status is updated from **Pending** to **Completed**.
   - The **Status Update** column is updated with the processing date and the user ID.

Related Topics

For more information on...	See...
How to search for a delinquency process	Searching for a Delinquency Process on page 4266
Delinquency Process screen	Delinquency Process (Used for Viewing) on page 4267
Events zone	Events on page 4270

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Skipping an Event in a Delinquency Process

Prerequisites

To skip an event in a delinquency process, you should have:

- Delinquency event types defined in the application.

Procedure

To skip an event in a delinquency process:

1. Search for the delinquency process in the **Delinquency Process Search** screen.
2. In the **Search Results** section, click the link in the **Delinquency Process Information** column corresponding to the *d*elinquency process whose event you want to skip.
   The **Delinquency Process** screen appears.
3. Expand the **Events** zone.
4. Click the **Trigger Events** ( ) icon in the **Trigger Events** column *c*orresponding to the event which you want to skip.

   The system performs the following set of actions:

   - The event status is updated from **Pending** to **Skipped**.
   - The **Status Update** column is updated with the processing date and the user ID.

Related Topics

For more information on...	See...
How to search for a delinquency process	Searching for a Delinquency Process on page 4266
Delinquency Process screen	Delinquency Process (Used for Viewing) on page 4267
Events zone	Events on page 4270

Editing the Trigger Date of an Event in a Delinquency Process

Procedure

To edit the trigger date of an event in a delinquency process:

1. Search for the delinquency process in the **Delinquency Process Search** screen.
2. In the **Search Results** section, click the link in the **Delinquency Process Information** column corresponding to the *d*elinquency process whose event trigger date you want to edit.
   The **Delinquency Process** screen appears.
3. Expand the **Events** zone.
4. Click the **Trigger Events** ( ) icon in the **Edit Trigger Date** column *c*orresponding to the event whose event trigger date you want to edit.

   The **Delinquency Process Update Event Trigger Date** window appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Trigger Date	Displays the date when the event is scheduled to trigger.	Not applicable
New Trigger Date	Used to indicate the latest date on which the event is scheduled to trigger.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The new trigger date cannot be earlier than the system date.	

5. Click **Save**.
   The changes made to the event trigger date in a delinquency process are saved.

Related Topics

For more information on...	See...
How to search for a delinquency process	Searching for a Delinquency Process on page 4266
Delinquency Process screen	Delinquency Process (Used for Viewing) on page 4267
Events zone	Events on page 4270

Approving an Event of a Delinquency Process

Prerequisites

To approve an event of a delinquency process, you should have:

- Delinquency event defined in the application.
- To Do Type and To Do Role defined in the application.

Procedure

To approve an event of a delinquency process:

1. Search for the delinquency process in the **Delinquency Process Search** screen.
2. In the **Search Results** section, click the link in the **Delinquency Process Information** column corresponding to the *d*elinquency process whose event you want to approve.
   The **Delinquency Process** screen appears.
3. Ensure that the **Approval Details** zone is expanded.
4. Click the **Approve** ( ) icon in the **Approve** column *c*orresponding to the approval entry which you want to approve.

   The confirmation dialog appears confirming whether you want to approve the approval entry.
5. Click **OK**.
   The status of the approval entry is changed from **Approval In Progress** to **Approved**.

Related Topics

For more information on...	See...
How to search for a delinquency process	Searching for a Delinquency Process on page 4266
Delinquency Process screen	Delinquency Process (Used for Viewing) on page 4267
Approval Details zone	Approval Details on page 4272

Rejecting an Event of a Delinquency Process

Prerequisites

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To reject an event of a delinquency process, you should have:

- Delinquency event defined in the application.
- To Do Type and To Do Role defined in the application.

Procedure

To reject an event of a delinquency process:

1. Search for the delinquency process in the **Delinquency Process Search** screen.
2. In the **Search Results** section, click the link in the **Delinquency Process Information** column corresponding to the *d*elinquency process whose event you want to reject.
   The **Delinquency Process** screen appears.
3. Ensure that the **Approval Details** zone is expanded.
4. Click the **Reject** ( ) icon in the **Reject** column *c*orresponding to the approval entry which you want to reject.

   The confirmation dialog appears confirming whether you want to reject the approval entry.
5. Click **OK**.
   The status of the approval entry is changed from **Approval In Progress** to **Rejected**.

Related Topics

For more information on...	See...
How to search for a delinquency process	Searching for a Delinquency Process on page 4266
Delinquency Process screen	Delinquency Process (Used for Viewing) on page 4267
Approval Details zone	Approval Details on page 4272

Withdrawing an Event of a Delinquency Process

Prerequisites

To withdraw an event of a delinquency process, you should have:

- Delinquency event defined in the application.
- To Do Type and To Do Role defined in the application.

Procedure

To withdraw an event of a delinquency process:

1. Search for the delinquency process in the **Delinquency Process Search** screen.
2. In the **Search Results** section, click the link in the **Delinquency Process Information** column corresponding to the *d*elinquency process whose event you want to withdraw.
   The **Delinquency Process** screen appears.
3. Ensure that the **Approval Details** zone is expanded.
4. Click the **Withdraw** ( ) icon in the **Withdraw** column *c*orresponding to the approval entry which you want to withdraw.

   The confirmation dialog appears confirming whether you want to withdraw the approval entry.
5. Click **OK**.
   The status of the approval entry is changed from **Approval In Progress** to **Withdrawn**.

Related Topics

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For more information on...	See...
How to search for a delinquency process	Searching for a Delinquency Process on page 4266
Delinquency Process screen	Delinquency Process (Used for Viewing) on page 4267
Approval Details zone	Approval Details on page 4272

Delinquency Process Type Preference

A delinquency process type preference enables you to set the attributes which are used while creating a delinquency process for a person or an account. You need to create two distinct delinquency process type preferences – one for the fully insured group business and another for the fully insured individual business. A delinquency process type preference for the fully insured group business enables the system to create a delinquency process for a person or an account to which the policies are billed. However, a delinquency process type preference for the fully insured individual business enables the system to create a delinquency process for an account to which the individual memberships are billed. Once you create a delinquency process type preference for the fully insured group business, you need to specify the preference code in the **Delinquency Process Type Field Mapping – Group** parameter of the **C1-DLNQMNRL** algorithm. Similarly, Once you create a delinquency process type preference for the fully insured individual business, you need to specify the preference code in the **Delinquency Process Type Field Mapping – Individual** parameter of the **C1-DLNQMNRL** algorithm.

You can define, edit, delete, and copy a delinquency process type preference using the **C1-FieldMapping** business object through the **Field Mapping** screen. You can create a delinquency process type preference using the **Delinquency Process Type** preference category. While creating a delinquency process type preference for the fully insured individual business, you can specify the following attributes:

- **Active Individual Delinquency** – Used to indicate the delinquency process type using which you want to create a delinquency process for an account when its main customer is an active customer. An individual is deemed to be an active customer when at least one membership of the individual customer is in the **Active** status.
- **Effectuated Individual Delinquency for Ancillary** – Used to indicate the delinquency process type using which you want to create a delinquency process for an account when the following conditions are met:
  - The **Active Individual Delinquency** attribute is not defined in the delinquency process type preference
  - Paid through date is present on the account
  - Earliest unpaid coverage period does not include benefit charges
  - Individual is enrolled to a health plan which belongs to a non-medical health product
- **Effectuated Individual without Benefit** – Used to indicate the delinquency process type using which you want to create a delinquency process for an account when the following conditions are met:
  - The **Active Individual Delinquency** attribute is not defined in the delinquency process type preference
  - Paid through date is present on the account
  - Earliest unpaid coverage period does not include benefit charges
  - Individual is enrolled to a health plan which belongs to a medical health product
- **Effectuated Individual with Benefit** – Used to indicate the delinquency process type using which you want to create a delinquency process for an account when the following conditions are met:
  - The **Active Individual Delinquency** attribute is not defined in the delinquency process type preference
  - Paid through date is present on the account
  - Earliest unpaid coverage period includes benefit charges
- **Benefit Sub Type** – Used to indicate the benefit sub type. The system considers the benefit charges of the specified benefit sub type to derive the appropriate delinquency process type for an account. The system considers this attribute when the following conditions are met:
  - The **Active Individual Delinquency** attribute is not defined in the delinquency process type preference

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    - Paid through date is present on the account
    - The value is defined for the **Effectuated Individual with Benefit** attribute in the delinquency process type preference
- **Non-Effectuated Individual Delinquency** – Used to indicate the delinquency process type using which you want to create a delinquency process for an account when the following conditions are met:
    - The **Active Individual Delinquency** attribute is not defined in the delinquency process type preference
    - Paid through date is not present on the account
- **Termed Individual Delinquency** – Used to indicate the delinquency process type using which you want to create a delinquency process for an account when its main customer is an inactive customer. An individual is deemed to be an inactive customer when all memberships of the individual customer are in the **Terminated** status.

Note:

All the above-mentioned attributes are not applicable for the fully insured group business.

The **Active Individual Delinquency** and **Termed Individual Delinquency** attributes are required. If you do not specify the **Active Individual Delinquency** attribute, you need to specify the following attributes – **Effectuated Individual Delinquency for Ancillary**, **Effectuated Individual without Benefit**, **Effectuated Individual with Benefit**, **Benefit Sub Type**, and **Non-Effectuated Individual Delinquency**.

However, if you specify all these attributes including the **Active Individual Delinquency** attribute, the system will ignore the other attributes and only give priority to the **Active Individual Delinquency** attribute.

However, while creating a delinquency process type preference for the fully insured group business, you can specify the following attributes:

- **Active Group Customers – Account Level** – Used to indicate the delinquency process type using which you want to create the delinquency process for an account when its main customer is an active customer. A person is deemed to be an active customer when at least one policy associated with the person (i.e. policy holder) is in the **Active** status.
- **Active Group Customers – Person Level** – Used to indicate the delinquency process type using which you want to create the delinquency process for an active person. A person is deemed to be an active customer when at least one policy associated with the person (i.e. policy holder) is in the **Active** status.
- **Inactive Group Customers – Account Level** – Used to indicate the delinquency process type using which you want to create the delinquency process for an account when its main customer is an inactive customer. A person is deemed to be an inactive customer when all policies associated with the person (i.e. policy holder) are in the **Terminated** status.
- **Inactive Group Customers – Person Level** – Used to indicate the delinquency process type using which you want to create the delinquency process for an inactive person A person is deemed to be an inactive customer when all policies associated with the person (i.e. policy holder) are in the **Terminated** status.

Note:

All the above-mentioned attributes are not applicable for the fully insured individual business.

All the above attributes are mandatory while creating a delinquency process type preference for the fully insured group business.

You can define, edit, delete, and copy a delinquency process type preference through the **Field Mapping** screen.

Searching for a Delinquency Process Type Preference

Prerequisites

To search for a delinquency process type preference, you should have:

- Values defined in the **FIELD_CAT_FLG** lookup field

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Procedure

To search for a delinquency process type preference:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **F** and then click **Field Mapping**.
   A sub-menu appears.
3. Click the **Search** option from the **Field Mapping** sub-menu.
   The **Field Mapping** screen appears.
4. Select the **Delinquency Process Type** option from the **Preference Category** list.
5. Enter the additional search criteria in the **Search Field Mapping** zone.

> **Note:** ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.

6. Click **Search**.
   A list of delinquency process type preferences that meet the search criteria appears in the **Search Results** section.

Defining a Delinquency Process Type Preference

Prerequisites

To define a delinquency process type preference, you should have:

- Values defined in the **MAP_ENTITY_FLG** lookup field
- Values defined in the **FIELD_CAT_FLG** lookup field
- Delinquency process type defined in the application

Procedure

To define a delinquency process type preference:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **F** and then click **Field Mapping**.
   A sub-menu appears.
3. Click the **Add** option from the **Field Mapping** sub-menu.

   The **Select Business Object** screen appears. It contains the following field:

Field Name	Field Description	Mandatory (Yes or No)
Field Mapping Business Object	Used to indicate the business object using which you want to create the billing preference. The valid values are: • Bill Route Method - Contact Method Mapping • Field Mapping • Medicare Plan Benefit Package • Membership Status Reason Mapping	Yes

> **Note:** Alternatively, you can access the **Select Business Object** screen by clicking the **Add** button in the **Page Title** area of the **Field Mapping** screen.

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4. Select the **Field Mapping** option from the **Field Mapping Business Object** list.
5. Click **OK**.

   The **Field Mapping** screen appears. It contains the following sections:

- **Main** - Used to specify basic details of the delinquency process type preference. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Preference	Used to specify the delinquency process type preference.	Yes
Description	Used to specify the description for the delinquency process type preference.	Yes
Detailed Description	Used to specify additional information about the delinquency process type preference.	No
Status	Used to indicate the status of the delinquency process type preference. The valid values are: • Active • Inactive	Yes

- **Preference Category** - This section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Preference Category	Used to indicate the category to which the preference belongs. The valid values are: • Automatic Refund/Write-Off • Billing • Binder Payment • Configuration for Match Type - Handling Overpayment • Delinquency Process • Delinquency Process Type • Geographic Rating Area • Individual Membership • Medicare • Medicare Plan Benefit • Member Reconciliation • Member Relationship and Subscription Tier • Membership Repricing Reasons • Membership Status Reason • Routing Method - Contact Method Mapping • Statement Construct	Yes

- **Preference Settings** - Used to set the attributes in the delinquency process type preference. It contains the following fields in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Attribute	Used to indicate the attribute which you want to set in the delinquency process type preference. The valid values are:	Yes (Conditional)

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Field Name	Field Description	Mandatory (Yes or No)
	• **Active Individual Delinquency** - Used when you want to create a delinquency process for an active customer. • **Benefit Sub Type** - Used when you want the system to consider the benefit charges of the specified benefit sub type to derive the appropriate delinquency process type for the account. • **Effectuated Individual Delinquency for Ancillary** - Used when you want to create an effectuated individual delinquency process for ancillary services. • **Effectuated Individual without Benefit** - Used when you want to create an effectuated individual delinquency process without any benefit services. • **Effectuated Individual with Benefit** - Used when you want to create an effectuated individual delinquency process including the benefit services. • **Non-Effectuated Individual Delinquency** - Used when you want to create a non-effectuated individual delinquency process. • **Termed Individual Delinquency** - Used when you want to create a delinquency process for an inactive customer.	**Note:** This field is required while setting an attribute in the delinquency process type preference.
Value	Used to specify the attribute value. The attribute value that you can specify varies depending on the attribute you want to set in the delinquency process type preference. The valid values are: • **Active Individual Delinquency** - The **Value** field is used to indicate the delinquency process type using which you want to create the delinquency process when the main customer of the account, for which you want to create the delinquency process, is an active customer. An individual is deemed to be an active customer when at least one membership of the individual customer is in the **Active** status. **Note:** Here, you must specify the delinquency process type which is already defined in the system. • **Benefit Sub Type** - The **Value** field is used to indicate the benefit sub type. The system considers the benefit (i.e. subsidy) charges of the specified benefit sub type to derive the appropriate delinquency process type for the account. The system considers this attribute when the **Active Individual Delinquency** attribute is not defined and when paid through date is present on the account. • **Effectuated Individual Delinquency for Ancillary** - The **Value** field is used to indicate the delinquency process type using which you want to create the delinquency process when the following conditions are met: • The **Active Individual Delinquency** attribute is not defined	Yes (Conditional) **Note:** This field is required while setting an attribute in the delinquency process type preference.

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Field Name	Field Description	Mandatory (Yes or No)
	• Paid through date is present on the account • Earliest unpaid coverage period does not include subsidy charges • Individual is enrolled to a health plan which belongs to a non-medical health product • **Effectuated Individual without Benefit** - The **Value** field is used to indicate the delinquency process type using which you want to create the delinquency process when the following conditions are met: • The **Active Individual Delinquency** attribute is not defined • Paid through date is present on the account • Earliest unpaid coverage period does not include subsidy charges • Individual is enrolled to a health plan which belongs to a medical health product • **Effectuated Individual with Benefit** - The **Value** field is used to indicate the delinquency process type using which you want to create the delinquency process when the following conditions are met: • The **Active Individual Delinquency** attribute is not defined. • Paid through date is present on the account • Earliest unpaid coverage period includes subsidy charges • **Non-Effectuated Individual Delinquency** - The **Value** field is used to indicate the delinquency process type using which you want to create the delinquency process when the **Active Individual Delinquency** attribute is not defined and the paid through date is not present on the account. • **Termed Individual Delinquency** - The **Value** field is used to indicate the delinquency process type using which you want to create the delinquency process when the main customer of the account, for which you want to create the delinquency process, is an inactive customer. An individual is deemed to be an inactive customer when all memberships of the individual customer is in the **Terminated** status.	
Entity Type	Used to indicate the type of entity for which the attribute is applicable. The valid values are: • Account • Adjustment • Billable Charge • Membership • Payment • Policy	No

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Field Name	Field Description	Mandatory (Yes or No)
	Note: At present, this data is stored for informational purposes only and is not considered in the business logic. If required, you can add more entity types to the **MAP_ENTITY_FLG** lookup field.	

Note: While defining a delinquency process type preference, you must set at least one attribute in the delinquency process type preference.

6. Select the **Delinquency Process Type** option from the **Preference Category** list.
7. Enter the required details in the **Main** section.
8. Select the required attribute and value from the respective fields.
9. If you want to set more than one attribute in the delinquency process type preference, click the **Add** (+) icon and then repeat step 8.

Note: However, if you want to remove an attribute from the delinquency process type preference, click the **Delete** (🗑) icon corresponding to the attribute.

10. Click **Save**.
    The delinquency process type preference is defined.

Editing a Delinquency Process Type Preference

Prerequisites

To edit a delinquency process type preference, you should have:

- Values defined in the **MAP_ENTITY_FLG** lookup field
- Values defined in the **FIELD_CAT_FLG** lookup field
- Delinquency process type defined in the application

Procedure

To edit a delinquency process type preference:

1. Search for the delinquency process type preference in the **Field Mapping** screen.
2. In the **Search Results** section, click the **Edit** (✎) icon in the **Edit** column corresponding to the delinquency process type preference whose details you want to edit.

   The **Field Mapping** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details of the delinquency process type preference. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Preference	Displays the delinquency process type preference.	Not applicable
Description	Used to specify the description for the delinquency process type preference.	Yes
Detailed Description	Used to specify additional information about the delinquency process type preference.	No
Status	Used to indicate the status of the delinquency process type preference. The valid values are:	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	• Active • Inactive	
Preference Category	Indicates the category to which the preference belongs. The valid value is: • Delinquency Process Type	Not applicable

- **Preference Settings** - Used to set the attributes in the delinquency process type preference. It contains the following fields in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Attribute	Used to indicate the attribute which you want to set in the delinquency process type preference. The valid values are: • **Active Individual Delinquency** - Used when you want to create a delinquency process for an active customer. • **Benefit Sub Type** - Used when you want the system to consider the benefit charges of the specified benefit sub type to derive the appropriate delinquency process type for the account. • **Effectuated Individual Delinquency for Ancillary** - Used when you want to create an effectuated individual delinquency process for ancillary services. • **Effectuated Individual without Benefit** - Used when you want to create an effectuated individual delinquency process without any benefit services. • **Effectuated Individual with Benefit** - Used when you want to create an effectuated individual delinquency process including the benefit services. • **Non-Effectuated Individual Delinquency** - Used when you want to create a non-effectuated individual delinquency process. • **Termed Individual Delinquency** - Used when you want to create a delinquency process for an inactive customer.	Yes (Conditional) **Note:** This field is required while setting an attribute in the delinquency process type preference.
Value	Used to specify the attribute value. The attribute value that you can specify varies depending on the attribute you want to set in the delinquency process type preference. The valid values are: • **Active Individual Delinquency** - The **Value** field is used to indicate the delinquency process type using which you want to create the delinquency process when the main customer of the account, for which you want to create the delinquency process, is an active customer. An individual is deemed to be an active customer when at least one membership of the individual customer is in the **Active** status. **Note:** Here, you must specify the delinquency process type which is already defined in the system.	Yes (Conditional) **Note:** This field is required while setting an attribute in the delinquency process type preference.

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Field Name	Field Description	Mandatory (Yes or No)

	• **Benefit Sub Type** - The **Value** field is used to indicate the benefit sub type. The system considers the benefit (i.e. subsidy) charges of the specified benefit sub type to derive the appropriate delinquency process type for the account. The system considers this attribute when the **Active Individual Delinquency** attribute is not defined and when paid through date is present on the account.
	• **Effectuated Individual Delinquency for Ancillary** - The **Value** field is used to indicate the delinquency process type using which you want to create the delinquency process when the following conditions are met:
	  • The **Active Individual Delinquency** attribute is not defined
	  • Paid through date is present on the account
	  • Earliest unpaid coverage period does not include subsidy charges
	  • Individual is enrolled to a health plan which belongs to a non-medical health product
	• **Effectuated Individual without Benefit** - The **Value** field is used to indicate the delinquency process type using which you want to create the delinquency process when the following conditions are met:
	  • The **Active Individual Delinquency** attribute is not defined
	  • Paid through date is present on the account
	  • Earliest unpaid coverage period does not include subsidy charges
	  • Individual is enrolled to a health plan which belongs to a medical health product
	• **Effectuated Individual with Benefit** - The **Value** field is used to indicate the delinquency process type using which you want to create the delinquency process when the following conditions are met:
	  • The **Active Individual Delinquency** attribute is not defined.
	  • Paid through date is present on the account
	  • Earliest unpaid coverage period includes subsidy charges
	• **Non-Effectuated Individual Delinquency** - The **Value** field is used to indicate the delinquency process type using which you want to create the delinquency process when the **Active Individual Delinquency** attribute is not defined and the paid through date is not present on the account.
	• **Termed Individual Delinquency** - The **Value** field is used to indicate the delinquency process type using which you want to create the delinquency process when the main customer of the account, for which you want to create the delinquency process, is an inactive customer. An individual is deemed to be an inactive customer when	

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Field Name	Field Description	Mandatory (Yes or No)
	all memberships of the individual customer is in the **Terminated** status.	
Entity Type	Used to indicate the type of entity for which the attribute is applicable. The valid values are: • Account • Adjustment • Billable Charge • Membership • Payment • Policy **Note:** At present, this data is stored for informational purposes only and is not considered in the business logic. If required, you can add more entity types to the **MAP_ENTITY_FLG** lookup field.	No

Tip: Alternatively, you can edit the details of a delinquency process type preference by clicking the **Edit** button in the **Field Mapping** zone.

3. Modify the required details in the **Main** section.
4. Define, edit, or remove the attribute from the delinquency process type preference, if required.

Note: You must set at least one attribute in a delinquency process type preference.

5. Click **Save**.
   The changes made to the delinquency process type preference are saved.

Related Topics

For more information on...	See...
How to search for a delinquency process type preference	Searching for a Delinquency Process Type Preference on page 4283

Deleting a Delinquency Process Type Preference

Procedure

To delete a delinquency process type preference:

1. Search for the delinquency process type preference in the **Field Mapping** screen.
2. In the **Search Results** section, click the **Delete** (🗑) icon in the **Delete** column corresponding to the delinquency process type preference that you want to delete.
   A message appears confirming whether you want to delete the delinquency process type preference.

Tip: Alternatively, you can delete a delinquency process type preference by clicking the **Delete** button in the **Field Mapping** zone.

3. Click **OK**.
   The delinquency process type preference is deleted.

Related Topics

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For more information on...	See...
How to search for a delinquency process type preference	Searching for a Delinquency Process Type Preference on page 4283

Copying a Delinquency Process Type Preference

Instead of creating a delinquency process type preference from scratch, you can create a new delinquency process type preference using an existing delinquency process type preference. This is possible through copying a delinquency process type preference. On copying a delinquency process type preference, the details including the attributes are copied to the new delinquency process type preference. You can then edit the details, if required.

Prerequisites

To copy a delinquency process type preference, you should have:

- Delinquency process type preference (whose copy you want to create) defined in the application
- Values defined in the **MAP_ENTITY_FLG** lookup field
- Values defined in the **FIELD_CAT_FLG** lookup field

Procedure

To copy a delinquency process type preference:

1. Search for the delinquency process type preference in the **Field Mapping** screen.
2. In the **Search Results** section, click the **Duplicate** (⧉) icon in the **Duplicate** column *c*orresponding to the delinquency process type preference whose copy you want to create.

   The **Field Mapping** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details of the delinquency process type preference. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Preference	Used to specify the delinquency process type preference.	Yes
Description	Used to specify the description for the delinquency process type preference.	Yes
Detailed Description	Used to specify additional information about the delinquency process type preference.	No
Status	Used to indicate the status of the delinquency process type preference. The valid values are: • Active • Inactive	Yes
Preference Category	Indicates the category to which the preference belongs. The valid values are: • Delinquency Process Type	Not applicable

   - **Preference Settings** - Used to set the attributes in the delinquency process type preference. It contains the following fields in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Attribute	Used to indicate the attribute which you want to set in the delinquency process type preference. The valid values are:	Yes (Conditional)

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Field Name	Field Description	Mandatory (Yes or No)
	• **Active Individual Delinquency** - Used when you want to create a delinquency process for an active customer. • **Benefit Sub Type** - Used when you want the system to consider the benefit charges of the specified benefit sub type to derive the appropriate delinquency process type for the account. • **Effectuated Individual Delinquency for Ancillary** - Used when you want to create an effectuated individual delinquency process for ancillary services. • **Effectuated Individual without Benefit** - Used when you want to create an effectuated individual delinquency process without any benefit services. • **Effectuated Individual with Benefit** - Used when you want to create an effectuated individual delinquency process including the benefit services. • **Non-Effectuated Individual Delinquency** - Used when you want to create a non-effectuated individual delinquency process. • **Termed Individual Delinquency** - Used when you want to create a delinquency process for an inactive customer.	**Note:** This field is required while setting an attribute in the delinquency process type preference.

Value	Used to specify the attribute value. The attribute value that you can specify varies depending on the attribute you want to set in the delinquency process type preference:
	• **Active Individual Delinquency** - Used to indicate the delinquency process type using which you want to create the delinquency process when the main customer of the account, for which you want to create the delinquency process, is an active customer. An individual is deemed to be an active customer when at least one membership of the individual customer is in the **Active** status.
	Note: Here, you must specify the delinquency process type which is already defined in the system.
	• **Benefit Sub Type** - Used to indicate the benefit sub type. The system considers the benefit (i.e. subsidy) charges of the specified benefit sub type to derive the appropriate delinquency process type for the account. The system considers this attribute when the **Active Individual Delinquency** attribute is not defined and when paid through date is present on the account.
	• **Effectuated Individual Delinquency for Ancillary** - Used to indicate the delinquency process type using which you want to create the delinquency process when the following conditions are met:
	  • The **Active Individual Delinquency** attribute is not defined
	  • Paid through date is present on the account
	  • Earliest unpaid coverage period does not include subsidy charges
		Yes (Conditional)
		Note: This field is required while setting an attribute in the delinquency process type preference.

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Field Name	Field Description	Mandatory (Yes or No)

	• Individual is enrolled to a health plan which belongs to a non-medical health product
	• **Effectuated Individual without Benefit** - Used to indicate the delinquency process type using which you want to create the delinquency process when the following conditions are met:
	  • The **Active Individual Delinquency** attribute is not defined
	  • Paid through date is present on the account
	  • Earliest unpaid coverage period does not include subsidy charges
	  • Individual is enrolled to a health plan which belongs to a medical health product
	• **Effectuated Individual with Benefit** - Used to indicate the delinquency process type using which you want to create the delinquency process when the following conditions are met:
	  • The **Active Individual Delinquency** attribute is not defined.
	  • Paid through date is present on the account
	  • Earliest unpaid coverage period includes subsidy charges
	• **Non-Effectuated Individual Delinquency** - Used to indicate the delinquency process type using which you want to create the delinquency process when the **Active Individual Delinquency** attribute is not defined and the paid through date is not present on the account.
	• **Termed Individual Delinquency** - Used to indicate the delinquency process type using which you want to create the delinquency process when the main customer of the account, for which you want to create the delinquency process, is an inactive customer. An individual is deemed to be an inactive customer when all memberships of the individual customer is in the **Terminated** status.	

Entity Type	Used to indicate the type of entity for which the attribute is applicable. The valid values are: • Account • Adjustment • Billable Charge • Membership • Payment • Policy **Note:** At present, this data is stored for informational purposes only and is not considered in the business logic. If required, you can add more entity types to the **MAP_ENTITY_FLG** lookup field.	No

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> **Note:** While defining a delinquency process type preference, you must set at least one attribute in the delinquency process preference.

> **Tip:** Alternatively, you can copy a delinquency process preference by clicking the **Duplicate** button in the **Field Mapping** zone.

3. Enter the required details in the **Main** section.
4. Define, edit, or remove the attribute from the delinquency process preference, if required.
5. Click **Save**.
   The new delinquency process preference is defined.

Related Topics

For more information on...	See...
How to search for a delinquency process type preference	Searching for a Delinquency Process Type Preference on page 4283

Viewing the Delinquency Process Type Preference Details

Procedure

To view the details of a delinquency process type preference:

1. Search for the delinquency process type preference in the **Field Mapping** screen.
2. In the **Search Results** section, click the **Broadcast** (ᯤ) icon corresponding to the delinquency process type preference whose details you want to view.
   The **Field Mapping** zone appears.
3. View the details of the delinquency process type preference in the **Field Mapping** zone.

Related Topics

For more information on...	See...
How to search for a delinquency process type preference	Searching for a Delinquency Process Type Preference on page 4283

Delinquency Process Preference

A delinquency process preference enables you to set the attributes which are used at various stages in the lifecycle of a delinquency process. In case you offer the **Delinquency Management** feature to both the fully insured group and individual customers, the system will use the same delinquency process preference for both the fully insured group business and the fully insured individual business.

Some attributes in the delinquency process preference are common for both the fully insured group business and the fully insured individual business, while some attributes are specific to the fully insured group business or the fully insured individual business. The system considers the delinquency process preference which is specified in the **Delinquency Process Field Mapping** option type of the **DELINPROC** feature configuration.

You can define, edit, delete, and copy a delinquency process preference using the **C1-FieldMapping** business object through the **Field Mapping** screen. You can create a delinquency process preference using the **Delinquency Process** preference category. While creating a delinquency process preference, you need to specify the following attributes:

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- **Advance Deposit Account Relationship Type** – Used to specify the account relationship type. It is used to identify the advance deposit account of a parent customer (i.e. policy holder) when the advance deposit level is set to **PG** or **POLI**, respectively. This attribute is required when the group customer wants to allocate advance deposit to settle its overdue bills. This attribute is only applicable for the fully insured group business.
- **Advance Deposit Contract Type** – Used to specify the advance deposit contract type. It is used to identify the advance deposit contract on the parent customer's advance deposit account or linked to the policy when the advance deposit level is set to **PG** or **POLI**, respectively. This attribute is required when the group customer wants to allocate advance deposit to settle its overdue bills. This attribute is only applicable for the fully insured group business.
- **Awaiting Membership Cancellation Reason** – Used to indicate the reason why you want to cancel an individual membership which is billed to an account. Here, you must specify a status reason which is already defined for the **Active** status of the **C1-IndMembership** business object.
- **Delinquency Process Approval In Progress Status** – Used to specify the status to which a delinquency process should be transitioned when approval process is configured for any manual action in a delinquency process type. This attribute is required only when you opt to configure approval process for any manual action in the delinquency process.
- **Delinquency Process Automatic Reinstatement Stopped** – Used to specify the status to which a delinquency process should be transitioned when automatic reinstatement of the delinquency process is stopped due to some reason.
- **Delinquency Process Canceled Status** – Used to specify the status to which a delinquency process should be transitioned when it is canceled due to any reason. It is also referred while resuming a delinquency process due to cancellation of a payment or an adjustment.
- **Delinquency Process Completed Status** – Used to specify the status to which a delinquency process should be transitioned when all its delinquency events are triggered successfully.
- **Delinquency Process Customer Reinstated Status** – Used to specify the status to which a delinquency process should be transitioned when the policies or individual memberships billed to the person or account are reinstated. It is also referred while resuming a delinquency process due to cancellation of a payment or an adjustment.
- **Delinquency Process Hold Status** – Used to specify the status to which a delinquency process should be transitioned when you manually hold the delinquency process or when the system automatically holds the delinquency process if the certain conditions are met.
- **Delinquency Process Initiate Cancel Status** – Used to specify the status to which a delinquency process should be transitioned when you manually cancel the delinquency process.
- **Delinquency Process Initiate Hold Status** – Used to specify the status to which a delinquency process should be transitioned when you manually hold the delinquency process.
- **Delinquency Process Initiate Reinstate Status** – Used to specify the status to which a delinquency process should be transitioned when you manually reinstate the delinquency process.
- **Delinquency Process Initiate Release Status** – Used to specify the status to which a delinquency process should be transitioned when you manually release the hold on delinquency process.
- **Delinquency Process Initiated Status** – Used to specify the status to which a delinquency process should be transitioned when it is created for a person or an account.
- **Delinquency Process InProgress Status** – Used to specify the status to which a delinquency process should be transitioned when its first event is triggered.
- **Delinquency Process Pending Termination Status** – Used to specify the status to which a delinquency process should be transitioned on the termination request date when the **C1-DPMON** batch is executed.
- **Delinquency Process Reinstate Status** – Used to specify the status to which a delinquency process should be transitioned when you manually reinstate the delinquency process or when the system automatically reinstates the delinquency process if the certain conditions are met.
- **Delinquency Process Released Status** – Used to specify the status to which a delinquency process should be transitioned when you manually release the hold on the delinquency process or when the system automatically releases the hold on the delinquency process if the certain conditions are met.
- **Delinquency Process Terminated Status** – Used to specify the status to which a delinquency process should be transitioned when the policies or individual memberships billed to the respective account are terminated in ORMB. This attribute is referred while executing the **C1-DPMON** batch.

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- **Delinquency Reinstatement Payment/Adjustment Canceled Status**– Used to specify the status to which a delinquency process should be transitioned when you want to resume the reinstated delinquency process due to cancellation of a payment or an adjustment.
- **Membership Termination Reason for Delinquency** – Used to indicate the reason why you want to terminate an active individual membership which is billed to an account. Here, you must specify a status reason which is already defined for the **Terminated** status of the **C1-IndMembership** business object.
- **Policy Characteristic Type for Customer Contact** – Used to indicate the characteristic type using which you want to store the policy ID on the customer contact. Here, you must specify a characteristic type where the characteristic entity is set to **Customer Contact**. This attribute is also referred while deriving the policy ID from the customer contact.
- **Policy Termination Reason for Delinquency Process** - Used to indicate the reason why you want to terminate an active policy which is billed to a person or an account. Here, you must specify a status reason which is already defined for the **Terminated** status of the **C1-POLICY** business object.

Searching for a Delinquency Process Preference

Prerequisites

To search for a delinquency process preference, you should have:

- Values defined in the **FIELD_CAT_FLG** lookup field

Procedure

To search for a delinquency process preference:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **F** and then click **Field Mapping**.
   A sub-menu appears.
3. Click the **Search** option from the **Field Mapping** sub-menu.
   The **Field Mapping** screen appears.
4. Select the **Delinquency Process** option from the **Preference Category** list.
5. Enter the additional search criteria in the **Search Field Mapping** zone.

   Note: ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.
6. Click **Search**.
   A list of delinquency process preferences that meet the search criteria appears in the **Search Results** section.

Defining a Delinquency Process Preference

Prerequisites

To define a delinquency process preference, you should have:

- Values defined in the **MAP_ENTITY_FLG** lookup field
- Values defined in the **FIELD_CAT_FLG** lookup field
- Delinquency process defined in the application

Procedure

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To define a delinquency process preference:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **F** and then click **Field Mapping**.
   A sub-menu appears.
3. Click the **Add** option from the **Field Mapping** sub-menu.

   The **Select Business Object** screen appears. It contains the following field:

Field Name	Field Description	Mandatory (Yes or No)
Field Mapping Business Object	Used to indicate the business object using which you want to create the billing preference. The valid values are: • Bill Route Method - Contact Method Mapping • Field Mapping • Group Membership Status Reason Mapping • Medicare Plan Benefit Package • Membership Status Reason Mapping	Yes

Note: Alternatively, you can access the **Select Business Object** screen by clicking the **Add** button in the **Page Title** area of the **Field Mapping** screen.

4. Select the **Field Mapping** option from the **Field Mapping Business Object** list.
5. Click **OK**.

   The **Field Mapping** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details of the delinquency process preference. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Preference	Used to specify the delinquency process preference.	Yes
Description	Used to specify the description for the delinquency process preference.	Yes
Detailed Description	Used to specify additional information about the delinquency process preference.	No
Status	Used to indicate the status of the delinquency process preference. The valid values are: • Active • Inactive	Yes

   - **Preference Category** - This section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Preference Category	Used to indicate the category to which the preference belongs. The valid values are: • Automatic Refund/Write-Off • Billing • Binder Payment • Claim Extract	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	• Configuration for Match Type - Handling Overpayment • Delinquency Process • Delinquency Process Type • Geographic Rating Area • Individual Membership • Medicare • Medicare Plan Benefit • Member Reconciliation • Member Relationship and Subscription Tier • Membership Repricing Reasons • Membership Status Reason • Routing Method - Contact Method Mapping • Statement Construct	

- **Preference Settings** - Used to set the attributes in the delinquency process preference. It contains the following fields in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Attribute	Used to indicate the attribute which you want to set in the delinquency process preference. The valid values are: • **Advance Deposit Account Relationship Type** - Used to specify the account relationship type. It is used to identify the advance deposit account of a parent customer (i.e. policy holder) when the advance deposit level is set to **PG** or **POLI**, respectively. This attribute is required when the group customer wants to allocate advance deposit to settle its overdue bills. This attribute is only applicable for the fully insured group business. • **Advance Deposit Contract Type** - Used to specify the advance deposit contract type. It is used to identify the advance deposit contract on the parent customer's advance deposit account or linked to the policy when the advance deposit level is set to **PG** or **POLI**, respectively. This attribute is required when the group customer wants to allocate advance deposit to settle its overdue bills. This attribute is only applicable for the fully insured group business. • **Awaiting Membership Cancellation Reason** - Used to indicate the reason why you want to cancel an individual membership which is billed to an account. Here, you must specify a status reason which is already defined for the **Active** status of the **C1-IndMembership** business object. • **Delinquency Process Approval In Progress Status** - Used to specify the status to which a delinquency process should be transitioned when approval process is configured for any manual action in a delinquency process type. This attribute is required only when you opt to configure approval process for any manual action in the delinquency process.	Yes (Conditional) **Note:** This field is required while setting an attribute in the delinquency process preference.

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Field Name	Field Description	Mandatory (Yes or No)
	• **Delinquency Process Automatic Reinstatement Stopped** - Used to specify the status to which a delinquency process should be transitioned when automatic reinstatement of the delinquency process is stopped due to some reason. • **Delinquency Process Canceled Status** - Used to specify the status to which a delinquency process should be transitioned when it is canceled due to any reason. It is also referred while resuming a delinquency process due to cancellation of a payment or an adjustment. • **Delinquency Process Completed Status** - Used to specify the status to which a delinquency process should be transitioned when all its delinquency events are triggered successfully. • **Delinquency Process Customer Reinstated Status** - Used to specify the status to which a delinquency process should be transitioned when the policies or individual memberships billed to the person or account are reinstated. It is also referred while resuming a delinquency process due to cancellation of a payment or an adjustment. • **Delinquency Process Hold Status** - Used to specify the status to which a delinquency process should be transitioned when you manually hold the delinquency process or when the system automatically holds the delinquency process if the certain conditions are met. • **Delinquency Process Initiate Cancel Status** - Used to specify the status to which a delinquency process should be transitioned when you manually cancel the delinquency process. • **Delinquency Process Initiate Hold Status** - Used to specify the status to which a delinquency process should be transitioned when you manually hold the delinquency process. • **Delinquency Process Initiate Reinstate Status** - Used to specify the status to which a delinquency process should be transitioned when you manually reinstate the delinquency process. • **Delinquency Process Initiate Release Status** - Used to specify the status to which a delinquency process should be transitioned when you manually release the hold on delinquency process. • **Delinquency Process Initiated Status** - Used to specify the status to which a delinquency process should be transitioned when it is created for a person or an account. • **Delinquency Process InProgress Status** – Used to specify the status to which a delinquency process should be transitioned when its first event is triggered. • **Delinquency Process Pending Termination Status** – Used to specify the status to which a delinquency	

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Field Name	Field Description	Mandatory (Yes or No)
	process should be transitioned on the termination request date when the **C1-DPMON** batch is executed. • **Delinquency Process Reinstate Status** - Used to specify the status to which a delinquency process should be transitioned when you manually reinstate the delinquency process or when the system automatically reinstates the delinquency process if the certain conditions are met. • **Delinquency Process Released Status** – Used to specify the status to which a delinquency process should be transitioned when you manually release the hold on the delinquency process or when the system automatically releases the hold on the delinquency process if the certain conditions are met. • **Delinquency Process Terminated Status** – Used to specify the status to which a delinquency process should be transitioned when the policies or individual memberships billed to the respective account are terminated in ORMB. This attribute is referred while executing the **C1-DPMON** batch. • **Delinquency Reinstatement Payment/Adjustment Canceled Status** – Used to specify the status to which a delinquency process should be transitioned when you want to resume the reinstated delinquency process due to cancellation of a payment or an adjustment. • **Membership Termination Reason for Delinquency** – Used to indicate the reason why you want to terminate an active individual membership which is billed to an account. Here, you must specify a status reason which is already defined for the **Terminated** status of the **C1-IndMembership** business object. • **Policy Characteristic Type for Customer Contact** – Used to indicate the characteristic type using which you want to store the policy ID on the customer contact. Here, you must specify a characteristic type where the characteristic entity is set to **Customer Contact**. This attribute is also referred while deriving the policy ID from the customer contact. • **Policy Termination Reason for Delinquency Process** - Used to indicate the reason why you want to terminate an active policy which is billed to a person or an account. Here, you must specify a status reason which is already defined for the Terminated status of the **C1-POLICY** business object.	
Value	Used to specify the attribute value. The attribute value that you can specify varies depending on the attribute you want to set in the delinquency process preference.	Yes (Conditional) **Note:** This field is required while setting an attribute in the delinquency process preference.

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Field Name	Field Description	Mandatory (Yes or No)
Entity Type	Used to indicate the type of entity for which the attribute is applicable. The valid values are: • Account • Adjustment • Billable Charge • Membership • Payment • Policy **Note:** At present, this data is stored for informational purposes only and is not considered in the business logic. If required, you can add more entity types to the **MAP_ENTITY_FLG** lookup field.	No

Note: While defining a delinquency process preference, you must set at least one attribute in the delinquency process preference.

6. Select the **Delinquency Process** option from the **Preference Category** list.
7. Enter the required details in the **Main** section.
8. Select the required attribute and value from the respective fields.
9. If you want to set more than one attribute in the delinquency process preference, click the **Add** (+) icon and then repeat step 8.

Note: However, if you want to remove an attribute from the delinquency process preference, click the **Delete** (🗑) icon corresponding to the attribute.

10. Click **Save**.
    The delinquency process preference is defined.

Editing a Delinquency Process Preference

Prerequisites

To define a delinquency process preference, you should have:

- Values defined in the **MAP_ENTITY_FLG** lookup field
- Values defined in the **FIELD_CAT_FLG** lookup field
- Delinquency process defined in the application

Procedure

To define a delinquency process preference:

1. Search for the delinquency process preference in the **Field Mapping** screen.
2. In the **Search Results** section, click the **Edit** (✎) icon in the **Edit** column *c*orresponding to the delinquency process preference whose details you want to edit.

   The **Field Mapping** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details of the delinquency process preference. It contains the following fields:

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Field Name	Field Description	Mandatory (Yes or No)
Preference	Used to specify the delinquency process preference.	Yes
Description	Used to specify the description for the delinquency process preference.	Yes
Detailed Description	Used to specify additional information about the delinquency process preference.	No
Status	Used to indicate the status of the delinquency process preference. The valid values are: • Active • Inactive	Yes

- **Preference Category** - This section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Preference Category	Used to indicate the category to which the preference belongs. The valid values are: • Automatic Refund/Write-Off • Billing • Binder Payment • Claim Extract • Configuration for Match Type - Handling Overpayment • Delinquency Process • Delinquency Process Type • Geographic Rating Area • Individual Membership • Medicare • Medicare Plan Benefit • Member Reconciliation • Member Relationship and Subscription Tier • Membership Repricing Reasons • Membership Status Reason • Routing Method - Contact Method Mapping • Statement Construct	Yes

- **Preference Settings** - Used to set the attributes in the delinquency process preference. It contains the following fields in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Attribute	Used to indicate the attribute which you want to set in the delinquency process preference. The valid values are: • **Advance Deposit Account Relationship Type** - Used to specify the account relationship type. It is used to identify the advance deposit account of a parent customer (i.e. policy holder) when the advance deposit level is set to **PG** or **POLI**, respectively. This attribute is required when the group customer wants to allocate	Yes (Conditional) **Note:** This field is required while setting an attribute in the delinquency process type preference.

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Field Name	Field Description	Mandatory (Yes or No)
	advance deposit to settle its overdue bills. This attribute is only applicable for the fully insured group business. • **Advance Deposit Contract Type** - Used to specify the advance deposit contract type. It is used to identify the advance deposit contract on the parent customer's advance deposit account or linked to the policy when the advance deposit level is set to **PG** or **POLI**, respectively. This attribute is required when the group customer wants to allocate advance deposit to settle its overdue bills. This attribute is only applicable for the fully insured group business. • **Awaiting Membership Cancellation Reason** - Used to indicate the reason why you want to cancel an individual membership which is billed to an account. Here, you must specify a status reason which is already defined for the **Active** status of the **C1-IndMembership** business object. • **Delinquency Process Approval In Progress Status** - Used to specify the status to which a delinquency process should be transitioned when approval process is configured for any manual action in a delinquency process type. This attribute is required only when you opt to configure approval process for any manual action in the delinquency process. • **Delinquency Process Automatic Reinstatement Stopped** - Used to specify the status to which a delinquency process should be transitioned when automatic reinstatement of the delinquency process is stopped due to some reason. • **Delinquency Process Canceled Status** - Used to specify the status to which a delinquency process should be transitioned when it is canceled due to any reason. It is also referred while resuming a delinquency process due to cancellation of a payment or an adjustment. • **Delinquency Process Completed Status** - Used to specify the status to which a delinquency process should be transitioned when all its delinquency events are triggered successfully. • **Delinquency Process Customer Reinstated Status** - Used to specify the status to which a delinquency process should be transitioned when the policies or individual memberships billed to the person or account are reinstated. It is also referred while resuming a delinquency process due to cancellation of a payment or an adjustment. • **Delinquency Process Hold Status** - Used to specify the status to which a delinquency process should be transitioned when you manually hold the delinquency process or when the system automatically holds the delinquency process if the certain conditions are met. • **Delinquency Process Initiate Cancel Status** - Used to specify the status to which a delinquency process	

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Field Name	Field Description	Mandatory (Yes or No)
	should be transitioned when you manually cancel the delinquency process. • **Delinquency Process Initiate Hold Status** - Used to specify the status to which a delinquency process should be transitioned when you manually hold the delinquency process. • **Delinquency Process Initiate Reinstate Status** - Used to specify the status to which a delinquency process should be transitioned when you manually reinstate the delinquency process. • **Delinquency Process Initiate Release Status** - Used to specify the status to which a delinquency process should be transitioned when you manually release the hold on delinquency process. • **Delinquency Process Initiated Status** - Used to specify the status to which a delinquency process should be transitioned when it is created for a person or an account. • **Delinquency Process InProgress Status** – Used to specify the status to which a delinquency process should be transitioned when its first event is triggered. • **Delinquency Process Pending Termination Status** – Used to specify the status to which a delinquency process should be transitioned on the termination request date when the **C1-DPMON** batch is executed. • **Delinquency Process Reinstate Status** - Used to specify the status to which a delinquency process should be transitioned when you manually reinstate the delinquency process or when the system automatically reinstates the delinquency process if the certain conditions are met. • **Delinquency Process Released Status** – Used to specify the status to which a delinquency process should be transitioned when you manually release the hold on the delinquency process or when the system automatically releases the hold on the delinquency process if the certain conditions are met. • **Delinquency Process Terminated Status** – Used to specify the status to which a delinquency process should be transitioned when the policies or individual memberships billed to the respective account are terminated in ORMB. This attribute is referred while executing the **C1-DPMON** batch. • **Delinquency Reinstatement Payment/Adjustment Canceled Status** – Used to specify the status to which a delinquency process should be transitioned when you want to resume the reinstated delinquency process due to cancellation of a payment or an adjustment. • **Membership Termination Reason for Delinquency** – Used to indicate the reason why you want to terminate an active individual membership which is billed to an account. Here, you must specify a status reason which	

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Field Name	Field Description	Mandatory (Yes or No)
	is already defined for the **Terminated** status of the **C1-IndMembership** business object. • **Policy Characteristic Type for Customer Contact** – Used to indicate the characteristic type using which you want to store the policy ID on the customer contact. Here, you must specify a characteristic type where the characteristic entity is set to **Customer Contact**. This attribute is also referred while deriving the policy ID from the customer contact. • **Policy Termination Reason for Delinquency Process** - Used to indicate the reason why you want to terminate an active policy which is billed to a person or an account. Here, you must specify a status reason which is already defined for the Terminated status of the **C1-POLICY** business object.	
Value	Used to specify the attribute value. The attribute value that you can specify varies depending on the attribute you want to set in the delinquency process preference.	Yes (Conditional) **Note:** This field is required while setting an attribute in the delinquency process type preference.
Entity Type	Used to indicate the type of entity for which the attribute is applicable. The valid values are: • Account • Adjustment • Billable Charge • Membership • Payment • Policy **Note:** At present, this data is stored for informational purposes only and is not considered in the business logic. If required, you can add more entity types to the **MAP_ENTITY_FLG** lookup field.	No

Note: Alternatively, you can edit the details of a delinquency process preference by clicking the **Edit** button in the **Field Mapping** zone.

3. Modify the required details in the **Main** section.
4. Define, edit, or remove the attribute from the delinquency process preference, if required.

Note: You must set at least one attribute in a delinquency process preference.

5. Click **Save**.
   The changes made to the delinquency process preference are saved.

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Deleting a Delinquency Process Preference

Procedure

To delete a delinquency process preference:

1. Search for the delinquency process preference in the **Field Mapping** screen.
2. In the **Search Results** section, click the **Delete** (🗑) icon in the **Delete** column *c*orresponding to the delinquency process preference that you want to delete.
   A message appears confirming whether you want to delete the delinquency process preference.

   Tip: Alternatively, you can delete a delinquency process preference by clicking the **Delete** button in the **Field Mapping** zone.
3. Click **OK**.
   The delinquency process preference is deleted.

Related Topics

For more information on...	See...
How to search for a delinquency process preference	Searching for a Delinquency Process Preference on page 4297

Copying a Delinquency Process Preference

Instead of creating a delinquency process preference from scratch, you can create a new delinquency process preference using an existing delinquency process preference. This is possible through copying a delinquency process preference. On copying a delinquency process preference, the details including the attributes are copied to the new delinquency process preference. You can then edit the details, if required.

Prerequisites

To copy a delinquency process preference, you should have:

- Values defined in the **MAP_ENTITY_FLG** lookup field
- Values defined in the **FIELD_CAT_FLG** lookup field
- Delinquency process defined in the application

Procedure

To copy a delinquency process preference:

1. Search for the delinquency process preference in the **Field Mapping** screen.
2. In the **Search Results** section, click the **Duplicate** (📋) icon in the **Duplicate** column *c*orresponding to the delinquency process preference whose copy you want to create.

   The **Field Mapping** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details of the delinquency process preference. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Preference	Used to specify the delinquency process preference.	Yes
Description	Used to specify the description for the delinquency process preference.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
Detailed Description	Used to specify additional information about the delinquency process preference.	No
Status	Used to indicate the status of the delinquency process preference. The valid values are: • Active • Inactive	Yes
Preference Category	Indicates the category to which the preference belongs. The valid values are: • Delinquency Process	Not applicable

- **Preference Settings** - Used to set the attributes in the delinquency process preference. It contains the following fields in a grid:

Field Name	Field Description	Mandatory (Yes or No)
Attribute	Used to indicate the attribute which you want to set in the delinquency process preference. The valid values are: • **Advance Deposit Account Relationship Type** - Used to specify the account relationship type. It is used to identify the advance deposit account of a parent customer (i.e. policy holder) when the advance deposit level is set to **PG** or **POLI**, respectively. This attribute is required when the group customer wants to allocate advance deposit to settle its overdue bills. This attribute is only applicable for the fully insured group business. • **Advance Deposit Contract Type** - Used to specify the advance deposit contract type. It is used to identify the advance deposit contract on the parent customer's advance deposit account or linked to the policy when the advance deposit level is set to **PG** or **POLI**, respectively. This attribute is required when the group customer wants to allocate advance deposit to settle its overdue bills. This attribute is only applicable for the fully insured group business. • **Awaiting Membership Cancellation Reason** - Used to indicate the reason why you want to cancel an individual membership which is billed to an account. Here, you must specify a status reason which is already defined for the **Active** status of the **C1-IndMembership** business object. • **Delinquency Process Approval In Progress Status** - Used to specify the status to which a delinquency process should be transitioned when approval process is configured for any manual action in a delinquency process type. This attribute is required only when you opt to configure approval process for any manual action in the delinquency process. • **Delinquency Process Automatic Reinstatement Stopped** - Used to specify the status to which a delinquency process should be transitioned when	Yes (Conditional) **Note:** This field is required while setting an attribute in the delinquency process preference.

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Field Name	Field Description	Mandatory (Yes or No)
	automatic reinstatement of the delinquency process is stopped due to some reason. • **Delinquency Process Canceled Status** - Used to specify the status to which a delinquency process should be transitioned when it is canceled due to any reason. It is also referred while resuming a delinquency process due to cancellation of a payment or an adjustment. • **Delinquency Process Completed Status** - Used to specify the status to which a delinquency process should be transitioned when all its delinquency events are triggered successfully. • **Delinquency Process Customer Reinstated Status** - Used to specify the status to which a delinquency process should be transitioned when the policies or individual memberships billed to the person or account are reinstated. It is also referred while resuming a delinquency process due to cancellation of a payment or an adjustment. • **Delinquency Process Hold Status** - Used to specify the status to which a delinquency process should be transitioned when you manually hold the delinquency process or when the system automatically holds the delinquency process if the certain conditions are met. • **Delinquency Process Initiate Cancel Status** - Used to specify the status to which a delinquency process should be transitioned when you manually cancel the delinquency process. • **Delinquency Process Initiate Hold Status** - Used to specify the status to which a delinquency process should be transitioned when you manually hold the delinquency process. • **Delinquency Process Initiate Reinstate Status** - Used to specify the status to which a delinquency process should be transitioned when you manually reinstate the delinquency process. • **Delinquency Process Initiate Release Status** - Used to specify the status to which a delinquency process should be transitioned when you manually release the hold on delinquency process. • **Delinquency Process Initiated Status** - Used to specify the status to which a delinquency process should be transitioned when it is created for a person or an account. • **Delinquency Process InProgress Status** – Used to specify the status to which a delinquency process should be transitioned when its first event is triggered. • **Delinquency Process Pending Termination Status** – Used to specify the status to which a delinquency process should be transitioned on the termination request date when the **C1-DPMON** batch is executed. • **Delinquency Process Reinstate Status** - Used to specify the status to which a delinquency process should be transitioned when you manually reinstate the	

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Field Name	Field Description	Mandatory (Yes or No)
	delinquency process or when the system automatically reinstates the delinquency process if the certain conditions are met. • **Delinquency Process Released Status** – Used to specify the status to which a delinquency process should be transitioned when you manually release the hold on the delinquency process or when the system automatically releases the hold on the delinquency process if the certain conditions are met. • **Delinquency Process Terminated Status** – Used to specify the status to which a delinquency process should be transitioned when the policies or individual memberships billed to the respective account are terminated in ORMB. This attribute is referred while executing the **C1-DPMON** batch. • **Delinquency Reinstatement Payment/Adjustment Canceled Status** – Used to specify the status to which a delinquency process should be transitioned when you want to resume the reinstated delinquency process due to cancellation of a payment or an adjustment. • **Membership Termination Reason for Delinquency** – Used to indicate the reason why you want to terminate an active individual membership which is billed to an account. Here, you must specify a status reason which is already defined for the **Terminated** status of the **C1-IndMembership** business object. • **Policy Characteristic Type for Customer Contact** – Used to indicate the characteristic type using which you want to store the policy ID on the customer contact. Here, you must specify a characteristic type where the characteristic entity is set to **Customer Contact**. This attribute is also referred while deriving the policy ID from the customer contact. • **Policy Termination Reason for Delinquency Process** - Used to indicate the reason why you want to terminate an active policy which is billed to a person or an account. Here, you must specify a status reason which is already defined for the Terminated status of the **C1-POLICY** business object.	
Value	Used to specify the attribute value. The attribute value that you can specify varies depending on the attribute you want to set in the delinquency process preference.	Yes (Conditional) **Note:** This field is required while setting an attribute in the delinquency process preference.
Entity Type	Used to indicate the type of entity for which the attribute is applicable. The valid values are: • Account • Adjustment • Billable Charge	No

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Field Name	Field Description	Mandatory (Yes or No)
	• Membership • Payment • Policy	
	Note: At present, this data is stored for informational purposes only and is not considered in the business logic. If required, you can add more entity types to the **MAP_ENTITY_FLG** lookup field.	

Note: While defining a delinquency process preference, you must set at least one attribute in the delinquency process preference.

Tip: Alternatively, you can copy a delinquency process preference by clicking the **Duplicate** button in the **Field Mapping** zone.

3. Enter the required details in the **Main** section.
4. Define, edit, or remove the attribute from the delinquency process preference, if required.
5. Click **Save**.
   The new delinquency process preference is defined.

Related Topics

For more information on...	See...
How to search for a delinquency process preference	Searching for a Delinquency Process Preference on page 4297

Viewing the Delinquency Process Preference Details

Procedure

To view the details of a delinquency process preference:

1. Search for the delinquency process preference in the **Field Mapping** screen.
2. In the **Search Results** section, click the **Broadcast** (⦾) icon corresponding to the delinquency process preference whose details you want to view.
   The **Field Mapping** zone appears.
3. View the details of the delinquency process preference in the **Field Mapping** zone.

Related Topics

For more information on...	See...
How to search for a delinquency process preference	Searching for a Delinquency Process Preference on page 4297

Routing Method – Contact Method Mapping Preference

A routing method - contact method mapping preference enables you to map a bill routing method to a preferred contact method. The system will then derive the preferred contact method for the bill routing method from the routing method -

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contact method mapping preference while creating a customer contact for a person or an account during the delinquency management.

In case you offer the **Delinquency Management** feature to both the fully insured group and individual customers, the system will use the same routing method - contact method mapping preference for both the fully insured group business and the fully insured individual business. The system considers the routing method - contact method mapping preference which is specified in the **Routing Method - Contact Method Mapping** option type of the **DELINPROC** feature configuration.

You can define, edit, delete, and copy a routing method - contact method mapping preference using the **C1_BillRouteCntMethMap** business object through the **Field Mapping** screen. While creating a routing method - contact method mapping preference, you can specify the following attributes:

- **Bill Routing Method** - Used to indicate the bill routing method for which you want to map the preferred contact method. Here, the list includes all the values which are defined in the **BILL_RTG_METH_FLG** lookup field.
- **Preferred Contact Method** - Used to indicate the preferred contact method for the bill routing method. Here, the list includes all the values which are defined in the **CONTACT_METH_FLG** lookup field.

You can define, edit, delete, and copy a bill route method - contact method mapping preference through the **Field Mapping** screen.

Searching for a Bill Route Method - Contact Method Mapping Preference

Prerequisites

To search for a bill route method - contact method mapping preference, you should have:

- Values defined in the **FIELD_CAT_FLG** lookup field

Procedure

To search for a bill route method - contact method mapping preference:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **F** and then click **Field Mapping**.
   A sub-menu appears.
3. Click the **Search** option from the **Field Mapping** sub-menu.
   The **Field Mapping** screen appears.
4. Select the **Bill Route Method - Contact Method Mapping** option from the **Preference Category** list.
5. Enter the additional search criteria in the **Search Field Mapping** zone.

   Note: ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.
6. Click **Search**.
   A list of bill route method - contact method mapping preferences that meet the search criteria appears in the **Search Results** section.

Defining a Routing Method – Contact Method Mapping Preference

Prerequisites

To define a bill route method - contact method mapping preference, you should have:

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- Values defined in the **MAP_ENTITY_FLG** lookup field
- Values defined in the **FIELD_CAT_FLG** lookup field
- The **Bill Route Method - Contact Method Mapping (C1_BillRouteCntMethMap)** business object defined in the application

Procedure

To define a bill route method - contact method mapping preference:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **F** and then click **Field Mapping**.
   A sub-menu appears.
3. Click the **Add** option from the **Field Mapping** sub-menu.

   The **Select Business Object** screen appears. It contains the following field:

Field Name	Field Description	Mandatory (Yes or No)
Field Mapping Business Object	Used to indicate the business object using which you want to create the billing preference. The valid values are: • Bill Route Method - Contact Method Mapping • Field Mapping • Medicare Plan Benefit Package • Membership Status Reason Mapping	Yes

Note: Alternatively, you can access the **Select Business Object** screen by clicking the **Add** button in the **Page Title** area of the **Field Mapping** screen.

4. Select the **Bill Route Method - Contact Method Mapping** option from the **Field Mapping Business Object** list.
5. Click **OK**.

   The **Bill Route Method - Contact Method Mapping** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details of the bill route method - contact method mapping preference. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Preference	Used to specify the bill route method - contact method mapping preference.	Yes
Description	Used to specify the description for the bill route method - contact method mapping preference.	Yes

   - **Bill Route Method - Contact Method Mapping** - Used to set the bill routing and preferred contact method in the bill route method - contact method mapping preference. This section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Bill Routing Method	Used to indicate the bill routing method for which you want to map the preferred contact method. **Note:** Here, the list includes all the values which are defined in the **BILL_RTG_METH_FLG** lookup field.	Yes
Preferred Contact Method	Used to indicate the preferred contact method for the bill routing method.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	Note: Here, the list includes all the values which are defined in the **CONTACT_METH_FLG** lookup field.	

Note:

If a preference is defined using the **C1_BillRouteCntMethMap** business object, the system will derive the preferred contact method for the bill routing method from the preference while creating a customer contact for the delinquent account.

While defining a bill route method - contact method mapping preference, you must set at least one bill routing and preferred contact method in the bill route method contact method mapping preference.

6. Enter the required details in the **Main** section.
7. Select the required bill routing and preferred contact method from the respective fields.
8. If you want to set more than one bill routing and preferred contact method in the *b*ill route method - contact method mapping preference, click the **Add** (+) icon and then repeat step 8.

Note: However, if you want to remove a bill routing and preferred contact method from the *b*ill route method - contact method mapping preference, click the **Delete** (🗑) icon corresponding to the bill routing and preferred contact method.

9. Click **Save**.
   The bill route method - contact method mapping preference is defined.

Editing a Bill Route Method - Contact Method Mapping Preference

Prerequisites

To edit a bill route method - contact method mapping preference, you should have:

- Values defined in the **FIELD_CAT_FLG** and **FIELD_NAME_FLG** lookup fields

Procedure

To edit a bill route method - contact method mapping preference:

1. Search for a bill route method - contact method mapping preference in the **Field Mapping** screen.
2. In the **Search Results** section, click the **Edit** (✎) icon in the **Edit** column *c*orresponding to the a bill route method contact method mapping preference whose details you want to edit.

   The **Bill Route Method - Contact Method Mapping** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details of the bill route method - contact method mapping preference. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Preference	Displays the bill route method - contact method mapping preference.	Not applicable
Description	Used to specify the description for the bill route method - contact method mapping preference.	Yes

   - **Bill Route Method - Contact Method Mapping** - Used to set a bill routing and preferred contact method in the bill route method - contact method mapping preference. It contains the following fields in a grid:

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Field Name	Field Description	Mandatory (Yes or No)
Bill Routing Method	Indicates the bill routing method for which you want to map the preferred contact method. **Note:** Here, the list includes all the values which are defined in the **BILL_RTG_METH_FLG** lookup field.	Yes (Conditional) **Note:** This field is required while setting a bill routing and preferred contact method in a bill route method - contact method mapping preference
Preferred Contact Method	Indicates the preferred contact method for the bill routing method. **Note:** Here, the list includes all the values which are defined in the **CONTACT_METH_FLG** lookup field.	Yes (Conditional) **Note:** This field is required while setting a bill routing and preferred contact method in a bill route method - contact method mapping preference.

Note:

If a preference is defined using the **C1_BillRouteCntMethMap** business object, the system will derive the preferred contact method for the bill routing method from the preference while creating a customer contact for the delinquent account.

Alternatively, you can edit the details of a bill route method - contact method mapping preference by clicking the **Edit** button in the **Field Mapping** zone.

3. Modify the required details in the **Main** section.
4. Define, edit, or remove the bill routing and preferred contact method from the *b*ill route method - contact method mapping preference, if required.

Note: You must set at least one bill routing and preferred contact method in a bill route method - contact method mapping preference.

5. Click **Save**.
   The changes made to the bill route method - contact method mapping preference are saved.

Related Topics

For more information on...	See...
How to search for a bill route method - contact method mapping preference	Searching for a Bill Route Method - Contact Method Mapping Preference on page 4312

Deleting a Bill Route Method - Contact Method Mapping Preference

Procedure

To delete a bill route method - contact method mapping preference:

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1. Search for the bill route method - contact method mapping preference in the **Field Mapping** screen.
2. In the **Search Results** section, click the **Delete** (🗑) icon in the **Delete** column *c*orresponding to the bill route method - contact method mapping preference that you want to delete.
   A message appears confirming whether you want to delete the bill route method - contact method mapping preference.

   Tip: Alternatively, you can delete a bill route method - contact method mapping preference by clicking the **Delete** button in the **Field Mapping** zone.
3. Click **OK**.
   The bill route method - contact method mapping preference is deleted.

Related Topics

For more information on...	See...
How to search for a bill route method - contact method mapping preference	Searching for a Bill Route Method - Contact Method Mapping Preference on page 4312

Copying a Bill Route Method - Contact Method Mapping

Instead of creating a bill route method - contact method mapping preference from scratch, you can create a new bill route method - contact method mapping preference using an existing bill route method - contact method mapping preference. This is possible through copying a bill route method - contact method mapping preference. On copying a bill route method contact method mapping preference, the details including the bill routing and preferred contact method are copied to the new bill route method - contact method mapping preference. You can then edit the details, if required.

Prerequisites

To copy a bill route method contact method mapping preference, you should have:

- The **Bill Route Method - Contact Method Mapping (C1_BillRouteCntMethMap)** business object defined in the application
- Values defined in the **MAP_ENTITY_FLG** lookup field
- Values defined in the **FIELD_CAT_FLG** lookup field

Procedure

To copy a bill route method - contact method mapping preference:

1. Search for the bill route method - contact method mapping preference in the **Field Mapping** screen.
2. In the **Search Results** section, click the **Duplicate** (⧉) icon in the **Duplicate** column *c*orresponding to the bill route method - contact method mapping preference whose copy you want to create.

   The **Bill Route Method - Contact Method Mapping** screen appears. It contains the following sections:

   - **Main** - Used to specify basic details of the bill route method - contact method mapping preference. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Preference	Used to specify the bill route method - contact method mapping preference.	Yes
Description	Used to specify the description for the bill route method - contact method mapping preference.	Yes

   - **Bill Route Method - Contact Method Mapping** - Used to set the attributes in the delinquency process type preference. It contains the following fields in a grid:

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Field Name	Field Description	Mandatory (Yes or No)
Bill Routing Method	Used to indicate the bill routing method for which you want to map the preferred contact method. **Note:** Here, the list includes all the values which are defined in the **BILL_RTG_METH_FLG** lookup field.	Yes
Preferred Contact Method	Used to indicate the preferred contact method for the bill routing method. **Note:** Here, the list includes all the values which are defined in the **CONTACT_METH_FLG** lookup field.	Yes

Note:

If a preference is defined using the **C1_BillRouteCntMethMap** business object, the system will derive the preferred contact method for the bill routing method from the preference while creating a customer contact for the delinquent account.

While defining a bill route method - contact method mapping preference, you must set at least one bill routing and preferred contact method in the bill route method - contact method mapping preference.

Tip: Alternatively, you can copy a bill route method - contact method mapping preference by clicking the **Duplicate** button in the **Field Mapping** zone.

3. Enter the required details in the **Main** section.
4. Define, edit, or remove the bill routing and preferred contact method from the *b*ill route method - contact method mapping preference, if required.
5. Click **Save**.
   The new bill route method - contact method mapping preference is defined.

Related Topics

For more information on...	See...
How to search for a bill route method - contact method mapping preference	Searching for a Bill Route Method - Contact Method Mapping Preference on page 4312

Viewing the Bill Route Method - Contact Method Mapping Preference Details

Procedure

To view the details of a bill route method - contact method mapping preference:

1. Search for the bill route method - contact method mapping preference in the **Field Mapping** screen.
2. In the **Search Results** section, click the **Broadcast** (📡) icon corresponding to the bill route method - contact method mapping preference whose details you want to view.
   The **Field Mapping** zone appears.
3. View the details of the bill route method - contact method mapping preference in the **Field Mapping** zone.

Related Topics

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For more information on...	See...
How to search for a bill route method - contact method mapping preference	Searching for a Bill Route Method - Contact Method Mapping Preference on page 4312

Chapter 56

On Demand Billing

Topics:

- Prerequisites
- CSV File Format for Insurance Usage Data
- Usage Record Status Transition
- File Type
- On Demand Billing
- Usage Data Processing

Oracle no longer supports the Off Cycle Billing feature introduced in Oracle Revenue Management and Billing Version 2.2.4.2. Instead, the On Demand Billing feature has been introduced to facilitate adhoc billing. Earlier, you were only able to carry out billing based on the bill cycle (defined for the account). In other words, you were able to generate a bill for a bill cycle using the billable charges whose start and end dates fall within the bill cycle. However, there might be situations where you have received certain billing information after the bill is generated for the bill cycle. In such scenarios, you would like to generate a separate bill for the newly created billable charges. The system now allows you to generate an adhoc bill. However, note that you cannot generate adhoc bills through the **Bill** screen.

A bill is generated using the billable charges. Now, in order to differentiate between the normal and adhoc billable charges, you need to set the **Adhoc Bill** flag for the billable charges. If the value of the **Adhoc Bill** flag is set to **Y**, the system will consider the billable charge during adhoc billing. And, if the value of the **Adhoc Bill** flag is set to **N**, the system will consider the billable charge during regular billing based on the bill cycle.

A new batch named **Adhoc Billing (C1-FABL)** is created which generates adhoc bills. Both, automatically generated and manually created billable charges (with the **Adhoc Bill** flag set to **Y**) are considered during adhoc billing.

With Oracle Revenue Management and Billing V2.4.0.0.0, the On Demand Billing feature has been enhanced to facilitate billing for multiple usage data files in one go. Till now you were only able to create billable charges and bill for only one usage data file at a time using the using the **On Demand Billing** screen. However, there might be situations where you want to upload multiple usage data files and generate billable charges for the usage records (of a single or multiple accounts) that you may want to group together based on certain criteria. For example, you may want to generate billable charges for all debit transactions of one or more accounts. In such scenarios, you can now upload multiple usage data files using a file group and create billable charges for the records uploaded through the **Usage Data Processing** screen. You can create file groups based on various criteria to upload multiple usage data files. For example, you may want to create a file group for uploading usage data files of accounts that need to be billed for the services to be charged for using the credit card facility. You can create a file group using the **On Demand Billing** screen. You can then upload one or more usage data files using the file group through the **Usage Data Processing** screen. Oracle Revenue Management and Billing provides you with a facility to upload usage data received from various product processors or banking applications for billing. You can upload a usage data file in the CSV format. The **Usage Data Processing** screen allows you to upload usage data files for both banking and insurance modules. You need to ensure that the CSV file is in the required format; otherwise the file will not be uploaded in the system. For more information about the CSV file format,

see CSV File Format for Banking and CSV File Format for Insurance. When you upload a usage data file, mapping algorithm parses the flat file in the CSV format and maps the columns in the CSV file to an XML schema named Interface. The validation process starts immediately after the file is uploaded in the system. During the validation process, the system and custom validations (if any) are executed. The status of each usage record is changed to Valid or Invalid depending on whether the usage record was validated successfully or not. Once a usage record is successfully validated, you can submit the valid records and create billable charges for them. Once the usage data files are uploaded and billable charges are generated through the **Usage Data Processing** screen, you can then create and freeze the bills using the **On Demand Billing** screen.

You can optionally configure the system to use the approval workflow process for a usage data file. On submitting a valid record, the approval workflow process routes the usage record to the approver for approval. The approver receives a notification to approve the valid records. The approver can either approve or reject one or more valid records. Once the approver approves a valid record, a billable charge is created for the usage record. However, if the approver rejects a valid record, a notification is sent to the submitter to resolve the usage record. The submitter can then correct the existing data or add missing data (based on the review comments), and can again submit the valid record for approval. Once the valid record is approved, a billable charge is created for the usage record.

The system generates the bills based on the Bill After Date. The Bill After Date indicates the date after which adhoc or normal bills must be generated. In case of adhoc billing, the Bill After Date is specified for a file group using which you can upload one or more usage data files.

While uploading usage data files for adhoc billing, you may or may not specify the Bill After Date for a file group. The system behaves in the following manner when:

- **Bill After Date - Specified:** Adhoc bill is generated for the usage data file and account combination when the Bill After Date is equal to or earlier than the current date.
- **Bill After Date - Not Specified:** During the upload process, the Bill After Date is set to the current date. And, adhoc bill is generated for the usage data file and account combination when the Bill After Date is equal to or earlier than the current date.

In case of regular billing, you may or may not specify the Bill After Date while uploading a usage data file. The system behaves in the following manner when:

- **Bill After Date - Specified:** Normal bill is generated for the account in the bill cycle in which the bill after date falls.
- **Bill After Date - Not Specified:** Normal bill is generated for the account based on the bill cycle defined for the account.

Once the adhoc or normal bills are generated for a usage data file, you can freeze and complete the bills. Oracle Revenue Management and Billing provides you with the ability to freeze and complete adhoc bills generated for a usage data file from the **On Demand Billing** screen.

During the on demand billing process, each usage record of a file goes through various statuses until it is billed to the person. For more information about the usage record statuses, see Usage Record Status Transition on page 4325.

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Prerequisites

To setup the on demand billing process, you need to do the following:

- Ensure approver's user group has access to the **F1-DFLTS** application service
- Create a To Do Type for submitter named **C1-ODBSU** using the following information:
  - **Navigation Option** - C1_SUBMIT
  - **Priority** - Priority 10 - Highest
  - **Message Category** - 17000
  - **Message Number** - 1470
  - **Sort Keys** - Define the following sort keys for the To Do type:

Sort Key	Use as Default	Sort Order
Usage Data ID	Yes	Descending

  - **Drill Keys** - Define the following drill keys for the To Do type:

Table Name	Field Name
CI_BCHG_STG	BCHG_HSTG_ID
CI_BCHG_STG	FILE_NAME
CI_BCHG_STG	BCHG_STG_STAT_FLG

- Create a To Do Type for approver named **C1-ODBAP** using the following information:
  - **Navigation Option** - CI_NDAP
  - **Priority** - Priority 10 - Highest
  - **Message Category** - 17000
  - **Message Number** - 1470
  - **Sort Keys** - Define the following sort keys for the To Do type:

Sort Key	Use as Default	Sort Order
Usage Data ID	Yes	Descending

  - **Drill Keys** - Define the following drill keys for the To Do type:

Table Name	Field Name
CI_BCHG_STG	BCHG_HSTG_ID
CI_BCHG_STG	FILE_NAME

- Create a To Do role named **C1-ODBSU** for submitter and **C1-ODBAP** for approver
- Assign the **C1-ODBSU** To Do type to the **C1-ODBSU** To Do role
- Assign the **C1-ODBAP** To Do type to the **C1-ODBAP** To Do role
- Create a To Do role named **C1-ODFU** and assign users to this To Do role. The users who have the **C1-ODFU** To Do role will receive the To Do entries generated while executing the **Upload and Validate Usage Data File (C1-ODFU)** batch.
- Assign the **C1-ODFU** To Do type to the **C1-ODFU** To Do role
- Create a To Do role named **C1-ODBCH** and assign users to this To Do role. The users who have the **C1-ODBCH** To Do role will receive the To Do entries generated while executing the **Billable Charge Creation (C1-ODBCH)** batch.
- Assign the **C1-ODBCH** To Do type to the **C1-ODBCH** To Do role

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- Create a To Do role named **C1-FABL** and assign users to this To Do role. The users who have the **C1-FABL** To Do role will receive the To Do entries generated while executing the **Adhoc Billing (C1-FABL)** batch.
- Assign the **C1-FABL** To Do type to the **C1-FABL** To Do role
- Create a To Do role named **C1-FCADH** and assign users to this To Do role. The users who have the **C1-FCADH** To Do role will receive the To Do entries generated while executing the **Freeze and Complete Adhoc Bills (C1-FCADH)** batch.
- Assign the **C1-FCADH** To Do type to the **C1-FCADH** To Do role
- Set e-mail address for the users who are going to use the **On Demand Billing** screen (otherwise To Do entry will not be generated on executing the above batches)
- Create a mapping algorithm using the **C1-CSVPMALGO** algorithm type
- Create a validation algorithm using the **C1-VLDALGO** algorithm type
- Create an extract algorithm using the **C1-EXTALGO** algorithm type
- Create a To Do algorithm using the **C1_ODBTDALGO** algorithm type and set the following parameters in the algorithm:
  - **To Do Role for Submitter** - Used to indicate that users with the specified To Do role can only resolve the records which are rejected by the approver.
  - **To Do Type for Submitter** - Used to indicate that a To Do entry of the specified To Do type must be created when the approver rejects the records.
  - **To Do Role for Approver** - Used to indicate that users with the specified To Do role can only approve the records submitted by the submitter.
  - **To Do Type for Approver** - Used to indicate that a To Do entry of the specified To Do type must be created when the submitter submits the valid records for approval.
- Define the required file types in the system
- Define values for the following lookup fields:
  - ODB_CAN_RSN_FLG
  - ODB_REJ_RSN_FLG
  - PAGE_NUMBER
- If you want to create billable charges with future date for a contract, then ensure that the **Use Calendar Billing** option is set to **Allow Advanced Billing** in the respective contract type.
- Create an algorithm using the **C1-ODBFILEIN** algorithm type and attach it to the **Upload File Information** system event in the **Algorithms** tab of the **Installation Options - Framework** screen.

Besides this, you need to setup the following feature configurations:

- On Demand Billing (C1-ODBFC)
- Multi Parameter Based Pricing (C1_PPARM_FLG)

Note: If you want to use the **On Demand Billing** feature in an ORMB Cloud Service Premium Edition environment, you need to set the **ODB Extendable Lookup and Bucket** option type of the **C1-CFS** feature configuration.

Related Topics

For more information on...	See...
How to set the **On Demand Billing (C1-ODBFC)** feature configuration	Setting the C1-ODBFC Feature Configuration
How to set the **Multi Parameter Based Pricing (C1_PPARM_FLG)** feature configuration	Setting the C1_PPARM_FLG Feature Configuration on page 4461
How to set the **C1-CFS** feature configuration	Setting the C1-CFS Feature Configuration on page 4473

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CSV File Format for Insurance Usage Data

Before uploading a usage data file for insurance, you need to ensure that the CSV file contains the following columns:

Column Name	Description	Mandatory (Yes or No)
DATA IDENTIFIER	Used to specify the serial number of the usage record.	No
START DATE	Used to specify the date from when the price item was used. **Note:** You must specify the date in the YYYY-MM-DD format.	No
END DATE	Used to specify the date till when the price item was used. **Note:** You must specify the date in the YYYY-MM-DD format.	No
CONTRACT ID	Used to specify the contract ID.	Yes
CHARGE TYPE	Used to indicate the charge type.	No
DESCRIPTION	Used to specify the description for the usage record. It is shown on the billable charge.	Yes
BILL LINE DESCRIPTION1, BILL LINE DESCRIPTION2, ..., BILL LINE DESCRIPTION10	Used to specify the description for the line item (charge).	Yes (Conditional) **Note:** This data is required when the charge amount is specified.
AMOUNT1, AMOUNT2, ..., AMOUNT10	Used to specify the charge amount.	Yes (Conditional) **Note:** This data is required when the bill line description or currency is specified.
CURRENCY1, CURRENCY2, ..., CURRENCY10	Used to specify the currency in which the amount is charged. **Note:** If you specify a currency other than the account's invoice currency, the system will do the currency conversion if the appropriate exchange rate is available in the system.	Yes (Conditional) **Note:** This data is required when the charge amount is specified.
MEMO ONLY1, MEMO ONLY2, ..., MEMO ONLY10	Used to indicate whether the charge should be included in the bill amount or not. The valid values are: • true • false **Note:** By default, the value will be set to **false** if the column does not contain any value.	No

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Column Name	Description	Mandatory (Yes or No)
SUMMARY1, SUMMARY2, ..., SUMMARY10	Used to indicate whether the charge should be included in the summary line or not. The valid values are: • true • false **Note:** By default, the value will be set to **true** if the column does not contain any value.	No
SHOW ON BILL1, SHOW ON BILL2, ..., SHOW ON BILL10	Used to indicate whether the charge should appear on the person's printed bill or not. The valid values are: • true • false **Note:** By default, the value will be set to **true** if the column does not contain any value.	No
GL DISTRIBUTION CODE 1, GL DISTRIBUTION CODE 2, ..., GL DISTRIBUTION CODE 10	Used to specify the distribution code which indicates the GL account associated with the charge.	Yes (Conditional) **Note:** This data is required when **false** is specified in the **Memo Only** column corresponding to the bill line description.
PRICE ITEM	Used to specify the price item code.	Yes
VARIANCE	Used to indicate the variance that must be used along with the price item for determining the price item pricing.	No
PARAM TYPE1, PARAM TYPE2, ..., PARAM TYPE15	Used to indicate the price item parameter that must be used along with the price item for determining the price item pricing. **Note:** If the data in these columns will be used for price item parameter mapping, you must not use the equal to (=) and tilde (~) symbols in these columns.	Yes (Conditional) **Note:** This data is required when the parameter value is specified.
PARAM VALUE1, PARAM VALUE2, ..., PARAM VALUE15	Used to specify the parameter value. **Note:** If the data in these columns will be used for price item parameter mapping, you must not use the equal to (=) and tilde (~) symbols in these columns.	Yes (Conditional) **Note:** This data is required when the parameter type is specified.
SQI1, SQI2, ..., SQI10	Used to indicate the service quantity identifier that must be used for calculating the price item charges.	Yes (Conditional) **Note:** This data is required when the service quantity is specified.
SQIVALUE1, SQIVALUE2, ..., SQIVALUE10	Used to specify the number of units of the service quantity.	Yes (Conditional)

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Column Name	Description	Mandatory (Yes or No)
		Note: This data is required when the SQI is specified.
CHARTYPE1, CHARTYPE2, ..., CHARTYPE10	Used to indicate the characteristic that must be defined for the billable charge.	Yes (Conditional) **Note:** This data is required when the characteristic value is specified.
CHARVAL1, CHARVAL2, ..., CHARVAL10	Used to specify the value of the characteristic type.	Yes (Conditional) **Note:** This data is required when the characteristic type is specified.
RECURRING FLAG	Used to indicate whether recurring bill segments must be created at the intervals defined in the bill period or at the set invoice frequency.	No
BILL PERIOD	Used to indicate the bill period that you want to use for specifying the intervals at which the recurring bill segments must be created.	Yes (Conditional) **Note:** This data is required when the recurring flag is equal to Bill Period.
FREQUENCY	Used to indicate the invoice frequency at which the recurring bill segments must be created.	Yes (Conditional) **Note:** This data is required when the recurring flag is equal to Frequency.

Note:

The column names in the CSV file must be in the Upper case. Otherwise, erroneous results might occur when you upload the usage data file.

While uploading a file using a file type where business labels are defined for usage data fields, the CSV file should contain the business label in the respective column. Otherwise, the usage data file will not be uploaded in the system.

Usage Record Status Transition

The following figure graphically indicates how a usage record moves from one status to another during the on demand billing process:

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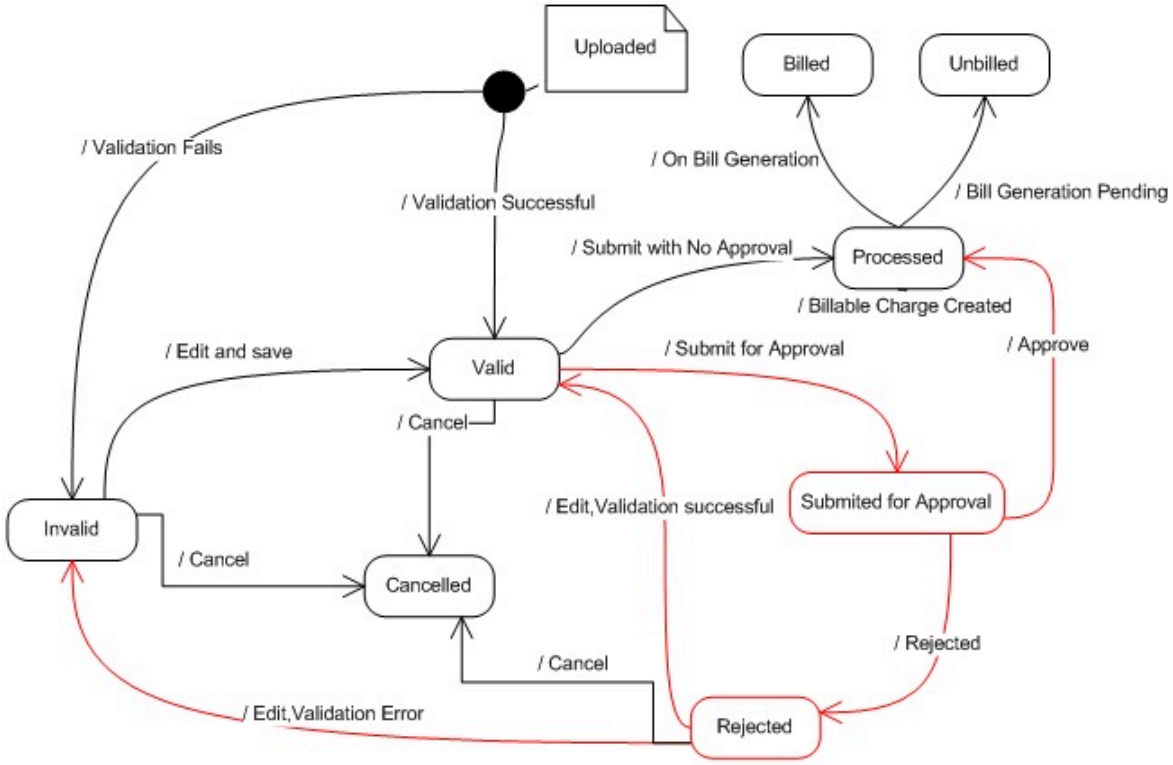

File Type

Oracle Revenue Management and Billing allows you to define file types using which you can upload a usage or payment data file. It is the file type which helps the system to understand how to process the file. The feed type specified in the file type indicates the type of data that you can upload using the file type. You can upload the following types of data using a file type:

- Banking Usage Data
- Insurance Usage Data

> **Note:** This file type is not applicable for financial services.

- Payment Upload Data

The following table lists the algorithms that you need to specify while defining file types for uploading usage or payment data:

Feed Type	Algorithm	Mandatory (Yes or No)	Algorithm Type Shipped with the Product...	Algorithm Type Purpose
Payment Upload Data	Mapping algorithm	Yes	C1-CSVUPLPAY	Parses the flat file in the CSV format and maps the columns in the CSV file to various tables in the database.
Payment Upload Data	Mapping algorithm	No	C1-CSVPMALGO	Parses the uploaded CSV format file and map usage data in a defined interface XML structure.

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Feed Type	Algorithm	Mandatory (Yes or No)	Algorithm Type Shipped with the Product...	Algorithm Type Purpose
Payment Upload Data	Validation algorithm	Yes	C1-PUPLVALID	Validates a payment data file.
Banking Usage Data	Mapping algorithm	Yes	C1-CSVPMALGO	Parses the flat file in the CSV format and maps the columns in the CSV file to an XML schema named **Interface**.
Banking Usage Data	Validation algorithm	No	C1-VLDALGO	Validates a usage data file.
Banking Usage Data	To Do algorithm	No	CM_ODBTDALGO	Initiates the approval process for usage records before creating the billable charges.
Banking Usage Data	Extract algorithm	No	C1-EXTALGO	Extracts the usage records along with the error messages (if any) in the CSV format.
Insurance Usage Data	Mapping algorithm	Yes	C1-CSVPMALGO	Parses the flat file in the CSV format and maps the columns in the CSV file to an XML schema named **Interface**.
Insurance Usage Data	Validation algorithm	No	None **Note:** You need to design custom algorithm type to validate insurance usage data.	-
Insurance Usage Data	To Do algorithm	No	CM_ODBTDALGO	Initiates the approval process for usage records before creating the billable charges.
Insurance Usage Data	Extract algorithm	No	C1-EXTALGO	Extracts the usage records along with the error messages (if any) in the CSV format.

The **File Type** screen allows you to define, edit, and delete a file type. This screen consists of the following zones:

- File Types on page 4327

File Types

The **File Types** zone lists the file types that are already defined in the system. You can define, edit and delete a file type through this zone.

This zone contains the following columns:

Column Name	Column Description
File Type	Displays the file type.

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Column Name	Column Description
Description	Displays the description of the file type.
Feed Type	Indicates the type of data that you can upload using the file type. The valid values are: • Banking Usage Data • Insurance Usage Data **Note:** This file type is not applicable for financial services. • Payment Upload Data
Mapping Algorithm	Indicates the mapping algorithm which is triggered when you upload a file. **Note:** It has a link. On clicking the link, the **Algorithm** screen appears where you can view the details of the respective algorithm.
Validation Algorithm	Indicates the validation algorithm which is triggered once the file is uploaded in the system. **Note:** It has a link. On clicking the link, the **Algorithm** screen appears where you can view the details of the respective algorithm.
To Do Algorithm	Indicates whether the usage records must be approved before creating the billable charges. If the algorithm is attached, it means the approval is required. **Note:** It has a link. On clicking the link, the **Algorithm** screen appears where you can view the details of the respective algorithm.
Extract Algorithm	Indicates the extract algorithm which extracts the usage records along with the error messages (if any) in the CSV format. **Note:** It has a link. On clicking the link, the **Algorithm** screen appears where you can view the details of the respective algorithm.
Edit	On clicking the **Edit** (✎) icon, the **File Type** screen appears where you can edit the details of the file type. **Note:** You can edit the details of a file type when no files are uploaded using the file type.
Delete	On clicking the **Delete** (🗑) icon, you can delete the file type. **Note:** You can only delete a file type which is not yet used for uploading a file.

Note: Pagination is used to display limited number of records in the **Search Results** section. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

You can define a file type by clicking the **Add** link in the upper right corner of this zone. You can also change the layout of this zone. For more information on how to change the layout, see Changing the Layout on page 4410.

You can filter the list using various search criteria (such as, **File Type**, **Feed Type** and **Description**) available in the **Filter** area. By default, the **Filter** area is hidden. You can view the **Filter** area by clicking the **Filters** (▽) icon in the upper right corner of this zone.

Related Topics

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For more information on...	See...
How to define a file type	Defining a File Type on page 4329
How to edit a file type	Editing a File Type on page 4333
How to delete a file type	Deleting a File Type on page 4336

Defining a File Type

Prerequisites

To define a file type, you should have:

- Mapping algorithm defined using the **C1-CSVUPLPAY** or **C1-CSVPMALGO** algorithm type
- Validation algorithm defined using the **C1-PUPLVALID** or **C1-VLDALGO** algorithm type.
- Extract algorithm defined using the **C1-EXTALGO** algorithm type
- To Do algorithm defined using the **C1_ODBTDALGO** algorithm type

Procedure

To define a file type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **F** and then click **File Type**.
   The **File Type** screen appears.
3. Click the **Add** link in the upper right corner of the **File Type** screen.

   The **File Type Maintenance** screen appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
File Type	Used to specify the file type.	Yes
Description	Used to specify the description for the file type.	Yes
Feed Type	Used to indicate the type of data that you can upload using the file type. The valid values are: • Banking Usage Data **Note:** This file type is not applicable for health insurance business. • Insurance Usage Data **Note:** This file type is not applicable for financial services. • Payment Upload Data	Yes
Disable Move to Staging	Used to indicate whether you want to disable the **Move to Staging** functionality in the **Payment Upload** screen. **Note:** This field appears when you select the **Payment Upload Data** option from the **Feed Type** list.	No
Mapping Algorithm	Used to attach a mapping algorithm which is triggered when you upload a file.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The **C1-CSVUPLPAY** algorithm type is designed for uploading payment data and the **C1-CSVPMALGO** algorithm type is designed for uploading usage data. The **C1-CSVUPLPAY** algorithm type does the following: **a.** Validates whether the file is in the CSV format **b.** Validates whether at least one payment record is available in the CSV file **c.** Parses the flat file in the CSV format and maps the columns in the CSV file to various tables in the database **d.** Uploads the payments records in the pre-staging area However, the **C1-CSVPMALGO** algorithm type does the following: **a.** Validates whether the file is in the CSV format **b.** Validates whether the CSV file contains data in the required format **c.** Validates whether the following data is available for each usage record: • Account Identifier Type • Account Identifier • Division • Price Item • Description **d.** Parses the flat file in the CSV format and maps the columns in the CSV file to an XML schema named **Interface** The **Search** (🔍) icon appears corresponding to this field. On clicking the **Search** icon, the **Algorithm Search** window appears.	
To Do Algorithm	Used to indicate whether the usage records must be approved before creating the billable charges. If the algorithm is attached, it means the approval is required.	No

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The **C1_ODBTDALGO** algorithm type contains the following parameters: • **To Do Role For Submitter** - Used to indicate that users with the specified To Do role can only resolve the records which are rejected by the approver. • **To Do Type For Submitter** - Used to indicate that a To Do using the specified To Do type must be created when the approver rejects the records. • **To Do Role For Approver** - Used to indicate that users with the specified To Do role can only approve the records submitted by the submitter. • **To Do Type For Approver** - Used to indicate that a To Do using the specified To Do type must be created when the submitter submits the valid records for approval. This field is disabled when you select the **Payment Upload Data** option from the **Feed Type** list. The **Search** (🔍) icon appears corresponding to this field. On clicking the **Search** icon, the **Algorithm Search** window appears.	
Validation Algorithm	Used to attach a validation algorithm which is triggered once the file is uploaded in the system. **Note:** The **C1-PUPLVALID** algorithm type is designed for validating a payment data file. It has some pre-defined validations based on which the status of the payment record is set to **Valid**, **Invalid**, or **Error**. For more information about the pre-defined validations, see Upload Payment Records in the Pre-Staging Area on page 1322. However, the **C1-VLDALGO** algorithm type is designed for validating a banking usage data file. It checks whether account identifier specified for each usage record contains any special characters. You can define any custom validations in this algorithm, if required. You cannot use an algorithm created using the **C1-VLDALGO** algorithm type to validate an insurance usage data file. If you want to validate an insurance usage data file, you need to create a custom algorithm type. The **Search** (🔍) icon appears corresponding to this field. On clicking the **Search** icon, the **Algorithm Search** window appears.	Yes (Conditional) **Note:** This field is required when you select the **Payment Upload Data** option from the **Feed Type** list.
Extract Algorithm	Used to attach an extract algorithm which extracts the usage records along with the error messages (if any) in the CSV format.	No

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Field Name	Field Description	Mandatory (Yes or No)
	Note: This field is disabled when you select the **Payment Upload Data** option from the **Feed Type** list. The **Search** (🔍) icon appears corresponding to this field. On clicking the **Search** icon, the **Algorithm Search** window appears.	

In addition, it contains the following two sections:

- **Map Divisions** - Used to indicate the divisions for which you want to use the file type.

Field Name	Field Description	Mandatory (Yes or No)
Division	Used to indicate the division. **Note:** You can only view those divisions to which you have access in the **Division** list.	No

Note: This section does not appear when you select the **Payment Upload Data** option from the **Feed Type** list.

- **Custom Labels** - Used to specify business labels for the usage data fields. The usage data fields will change depending on whether you have selected the **Banking Usage Data** or **Insurance Usage Data** option from the **Feed Type** list.

Note:

This section does not appear when you select the **Payment Upload Data** option from the **Feed Type** list.

If you have defined the business label for a usage data field, the CSV file should contain business label in the respective column. Otherwise, the usage data file will not be uploaded in the system.

4. Enter the required details.

Note:

You can search for an algorithm by clicking the **Search** (🔍) icon corresponding to the respective field.

If you want to associate more than one division with the file type, click the **Add** (+) icon and then specify the details in the **Map Divisions** section. However, if you want to remove a division from the file type, click the **Delete** (🗑) icon corresponding to the division.

5. Click **Save**.
   The file type is defined.

Related Topics

For more information on...	See...
File Type screen	File Type on page 4326
File Types zone	File Types on page 4327

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Editing a File Type

Prerequisites

To edit a file type, you should have:

- Mapping algorithm defined using the **C1-CSVUPLPAY** or **C1-CSVPMALGO** algorithm type
- Validation algorithm defined using the **C1-PUPLVALID** or **C1-VLDALGO** algorithm type.
- Extract algorithm defined using the **C1-EXTALGO** algorithm type
- To Do algorithm defined using the **C1_ODBTDALGO** algorithm type

Note: You can edit the details of a file type when no files are uploaded using the file type.

Procedure

To edit a file type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **F** and then click **File Type**.
   The **File Type** screen appears.
3. In the **File Types** zone, click the **Edit** (✎) icon in the **Edit** column corresponding to the file type whose details you want to edit.

   The **File Type Edit** screen appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
File Type	Used to specify the file type.	Yes
Description	Used to specify the description for the file type.	Yes
Feed Type	Used to indicate the type of data that you can upload using the file type. The valid values are: • Banking Usage Data **Note:** This file type is not applicable for health insurance business. • Insurance Usage Data **Note:** This file type is not applicable for financial services. • Payment Upload Data	Yes
Disable Move to Staging	Used to indicate whether you want to disable the **Move to Staging** functionality in the **Payment Upload** screen. **Note:** This field appears when you select the **Payment Upload Data** option from the **Feed Type** list.	No
Mapping Algorithm	Used to attach a mapping algorithm which is triggered when you upload a file.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The **C1-CSVUPLPAY** algorithm type is designed for uploading payment data and the **C1-CSVPMALGO** algorithm type is designed for uploading usage data. The **C1-CSVUPLPAY** algorithm type does the following: **a.** Validates whether the file is in the CSV format **b.** Validates whether at least one payment record is available in the CSV file **c.** Parses the flat file in the CSV format and maps the columns in the CSV file to various tables in the database **d.** Uploads the payments records in the pre-staging area However, the **C1-CSVPMALGO** algorithm type does the following: **a.** Validates whether the file is in the CSV format **b.** Validates whether the CSV file contains data in the required format **c.** Validates whether the following data is available for each usage record: • Account Identifier Type • Account Identifier • Division • Price Item • Description **d.** Parses the flat file in the CSV format and maps the columns in the CSV file to an XML schema named **Interface** The **Search** (🔍) icon appears corresponding to this field. On clicking the **Search** icon, the **Algorithm Search** window appears.	
To Do Algorithm	Used to indicate whether the usage records must be approved before creating the billable charges. If the algorithm is attached, it means the approval is required.	No

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Field Name	Field Description	Mandatory (Yes or No)
	Note: The **C1_ODBTDALGO** algorithm type contains the following parameters: • **To Do Role For Submitter** - Used to indicate that users with the specified To Do role can only resolve the records which are rejected by the approver. • **To Do Type For Submitter** - Used to indicate that a To Do using the specified To Do type must be created when the approver rejects the records. • **To Do Role For Approver** - Used to indicate that users with the specified To Do role can only approve the records submitted by the submitter. • **To Do Type For Approver** - Used to indicate that a To Do using the specified To Do type must be created when the submitter submits the valid records for approval. This field is disabled when you select the **Payment Upload Data** option from the **Feed Type** list. The **Search** (🔍) icon appears corresponding to this field. On clicking the **Search** icon, the **Algorithm Search** window appears.	
Validation Algorithm	Used to attach a validation algorithm which is triggered once the file is uploaded in the system. **Note:** The **C1-PUPLVALID** algorithm type is designed for validating a payment data file. It has some pre-defined validations based on which the status of the payment record is set to **Valid**, **Invalid**, or **Error**. For more information about the pre-defined validations, see Upload Payment Records in the Pre-Staging Area on page 1322. However, the **C1-VLDALGO** algorithm type is designed for validating a banking usage data file. It checks whether account identifier specified for each usage record contains any special characters. You can define any custom validations in this algorithm, if required. You cannot use an algorithm created using the **C1-VLDALGO** algorithm type to validate an insurance usage data file. If you want to validate an insurance usage data file, you need to create a custom algorithm type. The **Search** (🔍) icon appears corresponding to this field. On clicking the **Search** icon, the **Algorithm Search** window appears.	Yes (Conditional) **Note:** This field is required when you select the **Payment Upload Data** option from the **Feed Type** list.
Extract Algorithm	Used to attach an extract algorithm which extracts the usage records along with the error messages (if any) in the CSV format.	No

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Field Name	Field Description	Mandatory (Yes or No)
	Note: This field is disabled when you select the **Payment Upload Data** option from the **Feed Type** list. The **Search** (🔍) icon appears corresponding to this field. On clicking the **Search** icon, the **Algorithm Search** window appears.	

In addition, it contains the following two sections:

- **Map Divisions** - Used to indicate the divisions for which you want to use the file type.

Field Name	Field Description	Mandatory (Yes or No)
Division	Used to indicate the division. **Note:** You can only view those divisions to which you have access in the **Division** list.	No

Note: This section does not appear when the feed type is set to **Payment Upload Data**.

- **Custom Labels** - Used to specify business labels for the usage data fields. The usage data fields will change depending on whether you have selected the **Banking Usage Data** or **Insurance Usage Data** option from the **Feed Type** list.

Note:

This section does not appear when the feed type is set to **Payment Upload Data**.

If you have defined the business label for a usage data field, the CSV file should contain business label in the respective column. Otherwise, the usage data file will not be uploaded in the system.

4. Modify the required details.

Note:

You can search for an algorithm by clicking the **Search** (🔍) icon corresponding to the respective field.

If you want to associate more than one division with the file type, click the **Add** (+) icon and then specify the details in the **Map Divisions** section. However, if you want to remove a division from the file type, click the **Delete** (🗑) icon corresponding to the division.

5. Click **Save**.
   The changes made to the file type are saved.

Related Topics

For more information on...	See...
File Type screen	File Type on page 4326
File Types zone	File Types on page 4327

Deleting a File Type

Procedure

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To delete a file type:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **F** and then click **File Type**.
   The **File Type** screen appears.
3. In the **File Types** zone, click the **Delete** (🗑) icon in the **Delete** column corresponding to the file type that you want to delete.
   A message appears confirming whether you want to delete the file type.

   Note: You can only delete a file type which is not yet used for uploading a file.
4. Click **OK**.
   The file type is deleted.

Related Topics

For more information on...	See...
File Type screen	File Type on page 4326
File Types zone	File Types on page 4327

On Demand Billing

The **On Demand Billing** screen allows you to search for a file group based on various search criteria. Through this screen, you can:

- Define a file group
- Edit a file group
- Delete a file group
- Close a file group
- Generate adhoc bills for a file group
- Freeze and complete adhoc bills of a file group
- View all bills generated for a file group
- View usage data files of a file group
- Cancel a usage data file

This screen consists of the following zones:

- Search on page 4337
- Group Files on page 4339

Search

The **Search** zone allows you to search for file groups for which bills are processed and/or generated in the system. This zone contains the following two sections:

- **Search Criteria** - The **Search Criteria** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
File Group	Used to search for a specific file group based on a name/ or its identifier.	No

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Field Name	Field Description	Mandatory (Yes or No)
Description	Used to search for file groups based on description.	No
User ID	Used to search for file groups created by a specific user.	No
Bill After Date	Used to search for file groups with a bill date after the specified date. **Note:** You can either manually specify the date or select it using the **Date Picker** ( ) icon corresponding to the field.	No
Status	Used to search for file groups based on their current status. The valid values are: • Closed • Open	No

Note: You must specify at least one search criterion while searching for a file group.

- **Search Results** - On clicking the **Search** button, the search results appear based on the specified search criteria. The **Search Results** section contains the following columns:

Column Name	Column Description
File Group	Displays the name of the file group. **Note:** It has a link. On clicking the link, the **File Group** screen appears where you can view the details of the file group.
Bill After Date	Displays the date after which the bills must be generated for the file group.
Default Usage Start Date	Displays the date from when the price item was used.
Default Usage End Date	Displays the date till when the price item was used.
Status	Displays the status of the file group. The valid values are: • Open • Close
Close	On clicking the **Close** ( ) icon, you can close a file group. **Note:** You can only close a file group in which all the records of the usage data files are either in the processed or cancelled status.
Generate Bill	On clicking the **Generate Bill** ( ) icon, you can generate bills for a file group.
Complete Bill	On clicking the **Complete Bill**( ) icon, you can freeze and complete the bills of a file group.
Total	Displays the total number of records that are uploaded through the file group.
Valid	Displays the number of records which are successfully validated in the system.
Invalid	Displays the number of records which could not pass through the validation process in the system.
Submitted	Displays the number of valid records which are submitted for approval.

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Column Name	Column Description
Processed	Displays the number of valid records for which billable charges are already created.
Rejected	Displays the number of records which are rejected by the approver.
Cancelled	Displays the number of records which are cancelled in the system.
Unbilled	Displays the number of records for which billable charges are created, but are not yet billed to the person.
Billed	Displays the number of records for which billable charges are created and billed to the person.
Bills	Displays the number of bills generated for the file group. **Note:** It has a link. On clicking the link, the **View Bill Data** screen appears where you can view all bills generated for the usage data file.
Last Batch Status	Indicates the batch that was last executed on the file group and its current status. **Note:** It has a link. On clicking the link, the **Batch Run Tree** screen appears where you can view the execution details of the batch.

Note: Pagination is used to display limited number of records in the **Search Results** section. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

On clicking the **Broadcast** (📡) icon corresponding to the **File Group** field, the **Group Files** zones appear where you can view the details of the files.

Related Topics

For more information on...	See...
On Demand Billing screen	On Demand Billing on page 4337
How to search for a file group	Searching for a File Group on page 4341
How to define a file group	Defining a File Group on page 4341
How to edit a file group	Editing a File Group on page 4343
How to delete a file group	Deleting a File Group on page 4345
How to close a file group	Closing a File Group on page 4345
How to generate adhoc bills for a file group	Generating Adhoc Bills for a File Group on page 4346
How to freeze and complete one or more bills	Freezing Selected Bills of a File Group on page 4348
How to freeze and complete all bills of a file group	Freezing All Bills of a File Group on page 4347
How to view all bills generated for a file group	Viewing All Bills Generated for a File Group on page 4349
How to view usage data files of a file group	Viewing Usage Data Files of a File Group on page 4351
How to cancel a usage data file	Cancelling a Usage Data File on page 4399

Group Files

The **Group Files** zone allows you to view the usage data files uploaded using a file group. This zone contains the following two sections:

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- **Search Criteria** - the **Search Criteria** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
File Name	Used to search for usage data files by the file name.	No
File Type	Used to search the usage data files by file type.	No
File Upload From Date	Used to search the usage data files uploaded on or after the specified date. **Note:** You can either manually specify the date or select it using the **Date Picker** ( ) icon corresponding to the field.	No
File Upload To Date	Used to search the usage data files uploaded on or before the specified date. **Note:** You can either manually specify the date or select it using the **Date Picker** ( ) icon corresponding to the field.	No

- **Search Results** - On clicking the **Search** button, the search results appear based on the specified search criteria. The **Search Results** section contains the following columns:

Column Name	Column Description
File Information	Displays the name of the usage data file of the file group and its related details.
Total	Displays the total number of records that are uploaded through the usage data file.
Valid	Displays the number of records which are successfully validated in the system.
Invalid	Displays the number of records which could not pass through the validation process in the system.
Submitted	Displays the number of valid records which are submitted for approval.
Rejected	Displays the number of records which are rejected by the approver.
Processed	Displays the number of valid records for which billable charges are already created.
Cancelled	Displays the number of records of a usage data file which are cancelled.
UnBilled	Displays the number of records for which billable charges are created, but are not yet billed to the person.
Billed	Displays the number of records for which billable charges are created and billed to the person.
Cancel	On clicking the **Cancel** ( ) icon, you can cancel a file.

By default, the **Group Files** zone does not appear in the **On Demand Billing** screen. It appears when you click the **Broadcast** ( ) icon corresponding to the file group in the **Search Results** section.

Note: By default, the **Group Files** zone displays a list of usage data files that are uploaded using the file group in the **Search Results** section. However, you can filter the list of usage data files by specifying a search criteria in the **Search Criteria** section.

Related Topics

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For more information on...	See...
On Demand Billing screen	On Demand Billing on page 4337
How to view usage data files of a file group	Viewing Usage Data Files of a File Group on page 4351
How to cancel a file in the file group	Cancelling a Usage Data File on page 4399

Searching for a File Group

Procedure

To search for a file group:

1. Click the **Menu** link in the **Application** toolbar.
   A list appears.
2. From the **Main** menu, select **Billing Management** and then click **On Demand Billing**.
   The **On Demand Billing** screen appears.
3. Enter the search criteria in the **Search** zone.

   Note: ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.
4. Click **Search**.
   A list of file groups that meet the search criteria appears in the **Search Results** section.

Related Topics

For more information on...	See...
On Demand Billing screen	On Demand Billing on page 4337
Search zone	Search on page 4337

Defining a File Group

Prerequisites

To define a file group, you should have:

- Access to the divisions for which you want to define the file group

Procedure

To define a file group:

1. Click the **Menu** link in the **Application** toolbar.
   A list appears.
2. From the **Main** menu, select **Billing Management** and then click **On Demand Billing**.
   The **On Demand Billing** screen appears.
3. Click the **Add** link in the upper right corner of the **On Demand Billing** screen.

   The **File Group** screen appears. It contains the following fields:

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Field Name	Field Description	Mandatory (Yes or No)
File Group	Used to specify the file group.	Yes
Description	Used to specify the description for the file group.	Yes
Bill After Date	Used to specify the date after which the bill must be generated for the file group. **Note:** Bill after date should be equal to or greater than usage start date. You can either manually specify the date or select it using the **Date Picker** () icon corresponding to the field.	Yes
Default Usage Start Date	Used to specify the date from when the price item was used. The default usage start date is used when the start date is not specified for a record in the usage data file. By default, the current date appears in this field. You can change the default usage start date, if required. **Note:** The default usage start date cannot be later than the default usage end date. You can either manually specify the date or select it using the **Date Picker** () icon corresponding to the field.	Yes
Default Usage End Date	Used to specify the date till when the price item was used. The default usage end date is used when the end date is not specified for a record in the usage data file. By default, the current date appears in this field. You can change the default usage end date, if required. **Note:** The default usage end date cannot be earlier than the default usage start date. You can either manually specify the date or select it using the **Date Picker** () icon corresponding to the field.	Yes

In addition, the **File Group** screen contains the following section:

Map Divisions- The **Map Divisions** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Division	Used to indicate the division for which you want to define the file group.	No

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Field Name	Field Description	Mandatory (Yes or No)
		Note: If you do not associate division(s) with the file group, the file group is not available for uploading a usage data file. This means only those file groups for which you have specified division(s) can be used for uploading a usage data file.

4. Enter the required details.
5. If you want to define the file group for more than one division, click the **Add** (+) icon and then repeat step 5.

Note: However, if you want to remove a division from the file group, click the **Delete** (🗑) icon corresponding to the division.

6. Click **Save**.
   The file group is defined.

Related Topics

For more information on...	See...
On Demand Billing screen	On Demand Billing on page 4337
Search zone	Search on page 4337

Editing a File Group

Procedure

To edit a file group:

Note: You can edit the details of a file group when no usage data files of this group have been uploaded in the system or all the records in the usage data files of a file group are cancelled.

1. Click the **Menu** link in the **Application** toolbar.
   A list appears.
2. Select **Billing Management** and then click **On Demand Billing**.
   The **On Demand Billing** screen appears.
3. Search for the file group in the **On Demand Billing** screen.
4. In the **Search Results** section, click the link in the **File Group** column corresponding to the file group whose *d*etails you want to edit.

   The **File Group** screen appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
File Group	Displays the file group.	Not applicable
Description	Used to specify the description for the file group.	Yes
Bill After Date	Used to specify the date after which the bill must be generated for the file group.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
	Note: Bill after date should be equal to or greater than usage start date. You can either manually specify the date or select it using the **Date Picker** () icon corresponding to the field.	
Usage Start Date	Used to specify the date from when the price item was used. The default usage start date is used when the start date is not specified for a record in the usage data file.	Yes
	Note: The default usage start date cannot be later than the default usage end date. You can either manually specify the date or select it using the **Date Picker** () icon corresponding to the field.	
Usage End Date	Used to specify the date till when the price item was used. The default usage end date is used when the end date is not specified for a record in the usage data file.	Yes
	Note: The default usage end date cannot be earlier than the default usage start date. You can either manually specify the date or select it using the **Date Picker** () icon corresponding to the field.	

In addition, the **Add/Edit File Group** screen contains the following section:

- **Map Divisions**- The **Map Divisions** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Division	Used to indicate the division for which you want to define the file group.	No
		Note: If you do not associate division(s) with the file group, the file group is not available for uploading a usage data file. This means only those file groups for which you have specified division(s) can be used for uploading a usage data file.

5. Modify the required details.

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> **Note:** If you want to define the file group for more than one division, click the **Add** (+) icon and then specify the details. However, if you want to remove a division from the file group, click the **Delete** (🗑) icon corresponding to it.

6. Click **Save**.
   The changes made to the file group are saved.

Related Topics

For more information on...	See...
On Demand Billing screen	On Demand Billing on page 4337
Search zone	Search on page 4337

Deleting a File Group

Procedure

To delete a file group:

1. Click the **Menu** link in the **Application** toolbar.
   A list appears.
2. Select **Billing Management** and then click **On Demand Billing**.
   The **On Demand Billing** screen appears.
3. Search for the file group in the **On Demand Billing** screen.
4. In the **Search Results** section, click the link in the **File Group** column corresponding to the file group that you want to delete.
   The **File Group** screen appears.
5. Click **Delete**.
   The file group is deleted.

> **Note:** The delete button appears only if the file group is not yet used. In other words, you cannot delete a file group that you have used for uploading usage data files.

Related Topics

For more information on...	See...
How to search for a file group	Searching for a File Group on page 4341
On Demand Billing screen	On Demand Billing on page 4337
Search zone	Search on page 4337

Closing a File Group

Procedure

To close a file group:

1. Click the **Menu** link in the **Application** toolbar.
   A list appears.
2. From the **Main** menu, select **Billing Management** and then click **On Demand Billing**.
   The **On Demand Billing** screen appears.
3. Search for the file group in the **On Demand Billing** screen.

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4. In the **Search Results** section, click the **Close** (✕) icon in the **Close** column corresponding to the file group *t*hat you want to close.
   The status of the file group is changed to **Closed**.

> **Note:**
>
> A file group can be closed only when it contains at one uploaded file.
>
> You can only close a file group in which all the records of the usage data files are either in the processed, cancelled, or rejected status. However, you may close a file group in which all the records are not in the cancelled and/or processed status, but in that case a to do entry is sent to the approver for approval of the pending records.

Related Topics

For more information on...	See...
How to search for a file group	Searching for a File Group on page 4341
On Demand Billing screen	On Demand Billing on page 4337
Search zone	Search on page 4337

Generating Adhoc Bills for a File Group

Prerequisites

To generate adhoc bills for a file group, you should have:

- A file group that has been closed.

The **On Demand Billing** screen allows you to generate adhoc bills for a file group. However, you can generate bills only after you close the file group for which you want to generate adhoc bills.

Procedure

To generate adhoc bills for a file group:

1. Search for the file group in the **On Demand Billing** screen.
2. In the **Search Results** section, click the **Generate Bill** (📄) icon corresponding to the file group for which you *w*ant to generate the adhoc bills.

   The **Generate Bill** window appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Cutoff Date	Used to specify the cutoff date for the bill. **Note:** You can either manually specify the date or select it using the **Date Picker** (📅) icon corresponding to the field.	Yes
Accounting Date	Used to specify the accounting date of the bill. **Note:** You can either manually specify the date or select it using the **Date Picker** (📅) icon corresponding to the field.	Yes

3. Enter the required details.
4. Click **OK**.

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The adhoc bills are generated for the usage data files of a file group. An adhoc bill is generated for a usage data file and account combination when the bill after date is equal to or earlier than the current date. The status of the usage records is changed to **Billed**. If the total number of billable charges created for a usage data file exceeds the online bill creation limit, a batch job is created using the **Adhoc Billing (C1-FABL)** batch. A message appears indicating the batch job ID. This batch job creates adhoc bills for the usage data file.

Note:

You can change the online bill creation limit, whenever required, using the **On Demand Billing (C1-ODBFC)** feature configuration. For more information on the **Adhoc Billing (C1-FABL)** batch, see *Oracle Revenue Management and Billing Batch Execution Guide*.

If an adhoc bill with the **Pending** status already exists for a usage data file and account combination, then the existing bill is deleted and regenerated. However, you can generate the bill again for a file group only after manually deleting the bill from the **Bill** screen.

On successful completion of the **Adhoc Billing (C1-FABL)** batch, a To Do entry is created using the **C1-FABL** To Do type. You can view this To Do entry when you are assigned a To Do role which is mapped to the **C1-FABL** To Do type. This To Do indicates whether the batch was successfully executed or not. If the batch was successfully executed, it indicates the following:

- Number of billable charges which were processed
- Number of billable charges for which the bill after date is a future date
- Number of adhoc bills generated for the usage data file
- Number of billable charges which could not be processed successfully

Once the batch is executed successfully, the status of the usage records in a usage data file of a file group is changed to **Billed**.

Related Topics

For more information on...	See...
How to search for a file group	Searching for a File Group on page 4341
How to set the **On Demand Billing (C1-ODBFC)** feature configuration	Setting the C1-ODBFC Feature Configuration

Freezing All Bills of a File Group

Oracle Revenue Management and Billing provides you with the ability to freeze and complete adhoc bills generated for the usage data files of a file group from the **On Demand Billing** screen. You can either freeze and complete all or selected adhoc bills, whenever required. However, you cannot freeze and complete normal or regular bills from the **On Demand Billing** screen.

Procedure

To freeze and complete all adhoc bills generated for a file group:

1. Search for the file group in the **On Demand Billing** screen.
2. In the **Search Results** section, click the **Freeze and Complete** ( ) icon corresponding to the file group *w*hose adhoc bills you want to freeze and complete.

   The **Complete Bill** window appears. It contains the following fields:

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Field Name	Field Description	Mandatory (Yes or No)
Bill Date	Used to specify the date on which the bill was completed. **Note:** You can either manually specify the date or select it using the **Date Picker** ( ) icon corresponding to the field.	Yes
Accounting Date	Used to specify the accounting date of the bill. **Note:** You can either manually specify the date or select it using the **Date Picker** ( ) icon corresponding to the field.	Yes

3. Enter the required details.
4. Click **OK** in the message box.

   A batch job is created using the **Freeze and Complete Adhoc Bills (C1-FCADH)** batch. A message appears indicating the batch job ID. This batch job freezes and completes all adhoc bills of the usage data file which are in the **Pending** status. The system does not freeze and complete pending adhoc bills which have bill segments in the **Error** status. For more information on the **Freeze and Complete Adhoc Bills (C1-FCADH)** batch, see *Oracle Revenue Management and Billing Batch Execution Guide*.

   Note:

   On successful completion of the **Freeze and Complete Adhoc Bills (C1-FCADH)** batch, a To Do entry is created using the **C1-FCADH** To Do type. You can view this To Do entry when you are assigned a To Do role which is mapped to the **C1-FCADH** To Do type. This To Do indicates whether the batch was successfully executed or not. If the batch was successfully executed, it indicates the following:

   - Number of bills which were picked up for completion
   - Number of bills which were completed
   - Number of bills which could not be completed successfully

   Once the batch is executed successfully, the status of the bills is changed to **Complete**.

Related Topics

For more information on...	See...
How to search for a file group	Searching for a File Group on page 4341
How to freeze and complete one or more bills	Freezing Selected Bills of a File Group on page 4348

Freezing Selected Bills of a File Group

Oracle Revenue Management and Billing provides you with the ability to freeze and complete adhoc bills generated for a file group from the **On Demand Billing** screen. You can either freeze and complete all or selected adhoc bills, whenever required. However, you cannot freeze and complete normal or regular bills from the **On Demand Billing** screen.

Procedure

To freeze and complete selected adhoc bills of a file group:

1. Search for the file group in the **On Demand Billing** screen.

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2. In the **Search Results** section, click the link in the **Bills** column corresponding to the file group whose adhoc *b*ills you want to freeze and complete.
   The **View Bill Data** screen appears.
3. Select the check box corresponding to the pending adhoc bill that you want to freeze and complete.

> **Note:** The check box does not appear corresponding to the completed adhoc bills and pending adhoc bills which have bill segments in the **Error** status.

4. Click **Freeze/Complete**.

   The **Complete Bill** window appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Bill Date	Used to specify the date on which the bill was completed. **Note:** You can either manually specify the date or select it using the **Date Picker** ( ) icon corresponding to the field.	Yes
Accounting Date	Used to specify the accounting date of the bill. **Note:** You can either manually specify the date or select it using the **Date Picker** ( ) icon corresponding to the field.	Yes

5. Enter the required details.
6. Click **OK** in the message box.
   The status of the bills is changed to **Complete**.

> **Note:**
>
> The **Freeze/Complete** button is not available in the **View Bill Data** screen when:
>
> - All bills generated for a file group are in the **Complete** status
> - Multiple bills are generated for a usage data file of a file group and one or more bill segments of each bill are in the **Error** status
>
> In other words, the **Freeze/Complete** button is available in the **View Bill Data** screen when there is at least one pending bill for a file group where none of the bill segments are in the **Error** status.

Related Topics

For more information on...	See...
How to search for a file group	Searching for a File Group on page 4341
How to freeze and complete all bills of a file group	Freezing All Bills of a File Group on page 4347

Viewing All Bills Generated for a File Group

Procedure

To view all bills generated for a file group:

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1. Search for the file group in the **On Demand Billing** screen.
2. In the **Search Results** section, click the link in the **Bills** column corresponding to the file group whose bills *y*ou want to view.

   The **View Bill Data** screen appears. It contains the following fields:

Field Name	Field Description
File Group	Displays the name of the file group.
Description	Displays the description of the file group.
Bill Generation Date	Used to specify the date when the bills were generated for the file group. **Note:** You can either manually specify the date or select it using the **Date Picker** ( ) icon corresponding to the field.
Billing Method	Indicates the type of billing used for the file group. The valid values are: • Adhoc Billing
Bill Status	Used to indicate the status of the bill. The valid values are: • Pending • Complete

   In addition, this screen contains the following columns:

Column Name	Column Description
Bill ID	Displays the bill ID. **Note:** It has a link. On clicking the link, the **Bill** screen appears with the details of the respective bill.
Alternate Bill ID	Displays the alternate bill ID.
Bill Status	Displays the status of the bill. The valid values are: • Pending • Complete
Bill Date	Displays the date when the bill was completed.
Accounting Date	Displays the accounting date for which the financial transaction of the bill is created.
Invoice Amount	Displays the total amount billed to the person.
Invoice Currency	Displays the currency in which the amount is billed to the person.
Invoice Account ID	Indicates the account for which the bill is created. **Note:** It has a link. On clicking the link, the **Account** screen appears where you can view the details of the respective account.
Display Bill	On clicking this link, you can view the details of the respective bill. **Note:** This link appears only for the bills that are in the **Complete** status. The facility to view the generated bills in PDF format is available only if Oracle Documaker is integrated with Oracle Revenue Management and Billing.

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> **Note:**
>
> Pagination is used to display limited number of records in the **Search Results** section. You can change the number of records displayed per page, if required. You can use the navigation buttons, such as **First** (<<), **Previous** (<), **Next** (>), and **Last** (>>) to navigate between pages. You can also select the page to which you want to navigate from the **Go To** list.

3. Click **Search**.
4. View the bills generated for the usage data file in the **View Bill Data** screen.
5. If required, you can change the number of records displayed per page.

> **Note:** By default, the number of records that appear in each page depends on the minimum value defined in the **PAGE_NUMBER** lookup field. For example, if the **PAGE_NUMBER** lookup field has four values - 10, 20, 30, and 40, then the number of records displayed in each page, by default, would be 10.

6. If required, you can click the **First** (<<), **Previous** (<), **Next** (>), and **Last** (>>) buttons to navigate *b*etween pages.
7. If required, you can freeze and complete adhoc bills which are generated for the usage data file.

> **Note:**
>
> The **Freeze/Complete** button is not available in the **View Bill Data** screen when:
>
> - All bills generated for a usage data file are in the **Complete** status
> - Multiple bills are generated for a usage data file and one or more bill segments of each bill are in the **Error** status
>
> In other words, the **Freeze/Complete** button is available in the **View Bill Data** screen when there is at least one pending bill for a usage data file where none of the bill segments are in the **Error** status.

Related Topics

For more information on...	See...
How to search for a usage data file	Searching for a Usage Data File on page 4355
How to freeze and complete one or more bills	Freezing Selected Bills of a File Group on page 4348
How to freeze and complete all bills of a file group	Freezing All Bills of a File Group on page 4347

Viewing Usage Data Files of a File Group

Procedure

To view usage data files of a file group:

1. Search for the file group in the **On Demand Billing** screen.
2. In the **Search Results** section, click the **Broadcast** (((•))) icon corresponding to the file group whose usage data *f*iles you want to view.

   The **Group Files** zone appears.
3. View the usage data files of the file group in the **Group Files** zone.

Related Topics

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For more information on...	See...
How to search for a file group	Searching for a File Group on page 4341
Group Files zone	Group Files on page 4339

Usage Data Processing

The **Usage Data Processing** screen allows you to search for a usage data file based on various search criteria. Through this screen, you can:

- Upload a usage data file
- Cancel a usage data file
- View all records uploaded through a usage data file
- View the valid, invalid, and cancelled records of a usage data file
- View the valid records of a usage data file which are submitted for approval
- View the valid records of a usage data file for which billable charges are already created
- View the rejected, billed and unbilled records of a usage data file
- Submit the valid records of a usage data file and create billable charges for them
- Approve or reject one or more valid records of a usage data file
- Revalidate the valid and invalid records of a usage data file
- Edit the valid, invalid and rejected records of a usage data file
- Export the usage data of a usage data file into a CSV file

This screen consists of the following zones:

- Search on page 4352

Search

The **Search** zone allows you to search for usage data files that are uploaded and/or processed in the system. This zone contains the following two sections:

- **Search Criteria** - The **Search Criteria** section contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
File Name	Used to search for a specific usage data file based on its name.	No
File Type	Used to search for usage data file based on the type of uploaded file.	No
File Upload From Date	Used when you want to search for usage data files that were uploaded from a particular date onwards. **Note:** You can either manually specify the date or select it using the **Date Picker** ( ) icon corresponding to the field.	No
File Upload To Date	Used when you want to search for usage data files that were uploaded till a particular date.	No

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Field Name	Field Description	Mandatory (Yes or No)
	Note: You can either manually specify the date or select it using the **Date Picker** ( ) icon corresponding to the field.	
User ID	Used to search for usage data files uploaded by a specific user.	No
Billing Method	Used to search usage data files based on the billing method of the uploaded file. The valid values are: • Adhoc Billing • Regular Billing	No
File Group	Used to search for usage data files grouped under the specified file group.	No

Note: You must specify at least one search criterion while searching for a usage data file.

- **Search Results** - On clicking the **Search** button, the search results appear based on the specified search criteria. The **Search Results** section contains the following columns:

Column Name	Column Description
File Information	Displays the name of the usage data file and its related details.
Revalidate	On clicking the **Revalidate** ( ) icon, you can execute the validation process once again on the valid, invalid, and rejected records.
	Note: The **Revalidate** icon appears when the usage records are in the **Valid**, **Invalid**, and/or **Rejected** status. In other words, you cannot revalidate a usage data file for which billable charges are created or when the bills are generated for a usage data file.
Cancel	On clicking the **Cancel** ( ) icon, you can cancel all valid, invalid, and rejected records of the usage data file.
	Note: The **Cancel** icon appears when the usage records are in the **Valid**, **Invalid**, and/or **Rejected** status. In other words, you cannot cancel a usage data file for which billable charges are created or when the bills are generated for a usage data file.
Submit	On clicking the **Submit** ( ) icon, you can submit the valid records and create billable charges for them. If the valid usage records need to be approved before creating the billable charges, a To Do entry is created for the approver to approve the valid records.
	Note: The **Submit** icon appears when all the records of a usage data file are in the **Valid** status. In other words, if a usage data file contains records in the **Invalid** status, you cannot create billable charges for a usage data file.
Approve	On clicking the **Approve** () icon, the approver can approve all valid records of the usage data file.
	Note: The **Approve** icon appears when the usage data file (with all usage records in the **Valid** status) is uploaded using a file type to which the To Do algorithm (for enabling approval workflow) is attached.

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Column Name	Column Description
Total	Displays the total number of records that are uploaded through the usage data file. **Note:** It has a link. On clicking the link, the **Usage Data** screen appears where you can view all records uploaded through the usage data file.
Valid	Displays the number of records which are successfully validated in the system. **Note:** It has a link. On clicking the link, the **Usage Data** screen appears where you can view and edit all valid records of the usage data file.
Invalid	Displays the number of records which could not pass through the validation process in the system. **Note:** It has a link. On clicking the link, the **Usage Data** screen appears where you can view and edit all invalid records of the usage data file.
Submitted	Displays the number of valid records which are submitted for approval. **Note:** It has a link. On clicking the link, the **Usage Data** screen appears where you can view all submitted records of the usage data file.
Rejected	Displays the number of records which are rejected by the approver. **Note:** It has a link. On clicking the link, the **Usage Data** screen appears where you can view and edit all rejected records of the usage data file.
Processed	Displays the number of valid records for which billable charges are already created. **Note:** It has a link. On clicking the link, the **Usage Data** screen appears where you can view all processed records of the usage data file.
Billed	Displays the number of records for which billable charges are created and billed to the person. **Note:** It has a link. On clicking the link, the **Usage Data** screen appears where you can view all billed records of the usage data file.
Unbilled	Displays the number of records for which billable charges are created, but are not yet billed to the person. **Note:** It has a link. On clicking the link, the **Usage Data** screen appears where you can view all unbilled records of the usage data file.
Cancelled	Displays the number of records which are cancelled in the system. **Note:** It has a link. On clicking the link, the **Usage Data** screen appears where you can view all cancelled records of the usage data file.
Last Batch Status	Indicates the batch that was last executed on the usage data file and its current status. **Note:** It has a link. On clicking the link, the **Batch Run Tree** screen appears where you can view the execution details of the batch.

You can upload a usage data file by clicking the **Upload** link in the upper right corner of this zone.

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Note: Pagination is used to display limited number of records in the **Search Results** section. You can use the navigation links, such as **Previous** and **Next** to navigate between pages.

Related Topics

For more information on...	See...
Usage Data Processing screen	Usage Data Processing on page 4352
How to upload a usage data file	Uploading a Usage Data File on page 4356
How to replace an existing file	Replacing an Existing File on page 4359
How to search for a usage data file	Searching for a Usage Data File on page 4355
How to view all records of a usage data file	Viewing All Records of a Usage Data File on page 4363
How to view valid records of a usage data file	Viewing Valid Records of a Usage Data File on page 4366
How to view invalid records of a usage data file	Viewing Invalid Records of a Usage Data File on page 4370
How to view submitted records of a usage data file	Viewing Submitted Records of a Usage Data File on page 4373
How to view processed records of a usage data file	Viewing Processed Records of a Usage Data File on page 4377
How to view rejected records of a usage data file	Viewing Rejected Records of a Usage Data File on page 4384
How to view cancelled records of a usage data file	Viewing Cancelled Records of a Usage Data File on page 4380
How to view billed records of a usage data file	Viewing Billed Records of a Usage Data File on page 4387
How to view unbilled records of a usage data file	Viewing Unbilled Records of a Usage Data File on page 4390
How to view all bills generated for a usage data file	Viewing All Bills Generated for a File Group on page 4349
How to submit the valid records	Submitting a Valid Record on page 4394
How to edit the valid, invalid or rejected records	Editing a Valid, Invalid, or Rejected Usage Record on page 4401
How to approve the valid records	Approving a Valid Record on page 4395
How to reject the valid records	Rejecting a Valid Record on page 4398
How to cancel a usage data file	Cancelling a Usage Data File on page 4399
How to revalidate a usage data file	Revalidating a Usage Data File on page 4400
How to generate adhoc bills for a usage data file	Generating Adhoc Bills for a File Group on page 4346

Searching for a Usage Data File

Prerequisites

To search for a usage data file, you should have:

- File groups defined in the application

Procedure

To search for a usage data file:

1. Click the **Menu** link in the **Application** toolbar.
   A list appears.
2. From the **Main** menu, select **Billing Management** and then click **Usage Data Processing**.

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The **Usage Data Processing** screen appears.

3. Enter the search criteria in the **Search** zone.

> **Note:** ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.

4. Click **Search**.
   A list of usage data files that meet the search criteria appears in the **Search Results** section.

Related Topics

For more information on...	See...
Usage Data Processing screen	Usage Data Processing on page 4352
Search zone	Search on page 4352

Uploading a Usage Data File

Prerequisites

To upload a usage data file, you should have:

- File types defined in the application
- Usage data in the required CSV file format
- File group using which you want to upload the usage data files is in **Open** status

Procedure

To upload a usage data file:

1. Click the **Menu** link in the **Application** toolbar.
   A list appears.
2. From the **Main** menu, select **Billing Management** and then click **Usage Data Processing**.
   The **Usage Data Processing** screen appears.
3. Click the **Upload** link in the upper right corner of the **Search** zone.

   The **Upload Usage Data File** screen appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Billing Method	Used to specify the type of billing you want to use for the usage data file. The valid values are: • Adhoc Billing • Regular Billing	Yes
File Group	Used to specify the file group to which you want to add the usage data file.	Yes (Conditional)

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Field Name	Field Description	Mandatory (Yes or No)
	Note: This field appears only when you select the **Adhoc Billing** option from the **File Group** list. You can only view those file groups that are in the open status and to which you have access in the **File Group** list.	**Note:** If you select the billing method as **Adhoc Billing**, you have to specify the file group to which you want to add the usage data file.
Bill After Date	Used to specify the date after which the bills must be generated for the usage data file. By default, the current date appears in this field.	Yes (Conditional)
	Note: You can either manually specify the date or select it using the **Date Picker** ( ) icon corresponding to the field. If you have selected the billing method as **Adhoc Billing**, this field appears in read-only mode and displays the bill after date as defined for the selected file group. If you have selected the billing method as **Regular Billing** then this field is enabled displaying the current date.	**Note:** If you select the billing method as **Regular Billing**, you have to specify the bill after date.
Default Usage Start Date	Used to specify the date from when the price item was used. The default usage start date is used when the start date is not specified for a record in the usage data file. By default, the current date appears in this field. You can change the default usage start date, if required.	Yes (Conditional)
	Note: You can either manually specify the date or select it using the **Date Picker** ( ) icon corresponding to the field. If you have selected the billing method as **Adhoc Billing**, this field appears in read-only mode and displays the default usage start date as defined for the selected file group. If you have selected the billing method as **Regular Billing** then this field is enabled displaying the current date. The default usage start date cannot be later than the default usage end date.	**Note:** If you select the billing method as **Regular Billing**, you have to specify the default usage start date.
Default Usage End Date	Used to specify the date till when the price item was used. The default usage end date is used when the end date is not specified for a record in the usage data file. By default,	Yes (Conditional)

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Field Name	Field Description	Mandatory (Yes or No)
	the current date appears in this field. You can change the default usage end date, if required. **Note:** You can either manually specify the date or select it using the **Date Picker** ( ) icon corresponding to the field. If you have selected the billing method as **Adhoc Billing**, this field appears in read-only mode and displays the default usage end date as defined for the selected file group. If you have selected the billing method as **Regular Billing** then this field is enabled displaying the current date. The default usage end date cannot be earlier than the default usage start date.	**Note:** If you select the billing method as **Regular Billing**, you have to specify the default usage end date.
File Type	Used to specify the type of usage data file.	Yes
Replace Existing File	Used to indicate whether you want to replace any existing file in the system. You must select this check box when you want to upload the same file once again.	No
File Name	Used to specify the name and path of the usage data file that you want to upload. **Note:** You can also click the **Browse** button corresponding to this field to browse to the location where the usage data file is available in the system.	Yes

4. Enter the required details.
5. Click the **Browse** button corresponding to the **File Name** field.
   The **Choose File to Upload** dialog box appears.
6. Browse to the location where the usage data file that you want to upload is available.
7. Click **Open**.
   The usage data file name and path appears in the **File Name** field.
8. Click **Upload**.

   A message appears indicating that the usage data file has been uploaded successfully. If an error occurs while parsing, the usage data file is not uploaded in the system.

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Note:

The validation process starts immediately after the file is uploaded in the system. If a usage record is successfully validated, the status of the usage record is changed to **Valid**. And, if a usage record could not pass through the validation process, the status of the usage record is changed to **Invalid**. You can view the details of the uploaded file and its records in the **Usage Data Processing** screen.

If the usage data file size exceeds the file size limit set in the **C1-ODBFC** feature configuration, a batch job is created using the **Upload and Validate Usage Data File (C1-ODFU)** batch. A message appears indicating the batch job ID. This batch job uploads and validates the usage data file. You can change the file size limit using the **On Demand Billing (C1-ODBFC)** feature configuration. For more information on the **Upload and Validate Usage Data File (C1-ODFU)** batch, see *Oracle Revenue Management and Billing Batch Execution Guide*.

The number of usage records that are parsed and mapped in an XML file depends on the value defined for the **Staging XML Size** option type in the **On Demand Billing (C1-ODBFC)** feature configuration. For example, if the **Staging XML Size** option type is set to 100 and a usage data file contains 500 records, then the system creates 5 XML files - each containing 100 records.

If a batch job is created automatically, the number of usage records that are validated in each work unit depends on the value defined for the **Validation Chunk Size** option type in the **On Demand Billing (C1-ODBFC)** feature configuration.

On successful completion of the **Upload and Validate Usage Data File (C1-ODFU)** batch, a To Do entry is created using the **C1-ODFU** To Do type. You can view this To Do entry when you are assigned a To Do role which is mapped to the **C1-ODFU** To Do type. This To Do indicates whether the batch was successfully executed or not. If the batch was successfully executed, it indicates the following:

- Number of records that were uploaded in the system
- Number of records which were successfully validated
- Number of records which could not pass through the validation process
- Number of records which failed to validate due to some technical reasons

9. Click **OK** in the message box.
   Once a usage record is successfully validated, the status of the usage record is changed to **Valid**. And, if a usage record could not pass through the validation process, the status of the usage record is changed to **Invalid**.

Related Topics

For more information on...	See...
Usage Data Processing screen	Usage Data Processing on page 4352
Search zone	Search on page 4352
How to set the **On Demand Billing (C1-ODBFC)** feature configuration	Setting the C1-ODBFC Feature Configuration

Replacing an Existing File

Prerequisites

To replace an existing usage data file, you should have:

- File types defined in the application
- Usage data in the required CSV file format
- File group using which you want to upload the usage data files is in **Open** status

Procedure

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To replace an existing usage data file:

1. Click the **Menu** link in the **Application** toolbar.
   A list appears.
2. Select **Billing Management** and then click **Usage Data Processing**.
   The **Usage Data Processing** screen appears.
3. Click the **Upload** link in the upper right corner of the **Search** zone.

   The **Upload Usage Data File** screen appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Billing Method	Used to specify the type of billing you want to use for the usage data file. The valid values are: • Adhoc Billing • Regular Billing	Yes
File Group	Used to specify the file group to which you want to add the usage data file. **Note:** This field appears only when you select the **Adhoc Billing** option from the **File Group** list. You can only view those file groups that are in the open status and to which you have access in the **File Group** list.	Yes (Conditional) **Note:** If you select the billing method as **Adhoc Billing**, you have to specify the file group to which you want to add the usage data file.
Bill After Date	Used to specify the date after which the bills must be generated for the usage data file. By default, the current date appears in this field. **Note:** You can either manually specify the date or select it using the **Date Picker** ( ) icon corresponding to the field. If you have selected the billing method as **Adhoc Billing**, this field appears in read-only mode and displays the bill after date as defined for the selected file group. If you have selected the billing method as **Regular Billing** then this field is enabled displaying the current date.	Yes (Conditional) **Note:** If you select the billing method as **Regular Billing**, you have to specify the bill after date.
Default Usage Start Date	Used to specify the date from when the price item was used. The default usage start date is used when the start date is not specified for a record in the usage data file.	Yes (Conditional)

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Field Name	Field Description	Mandatory (Yes or No)
	By default, the current date appears in this field. You can change the default usage start date, if required. **Note:** You can either manually specify the date or select it using the **Date Picker** ( ) icon corresponding to the field. If you have selected the billing method as **Adhoc Billing**, this field appears in read-only mode and displays the default usage start date as defined for the selected file group. If you have selected the billing method as **Regular Billing** then this field is enabled displaying the current date. The default usage start date cannot be later than the default usage end date.	**Note:** If you select the billing method as **Regular Billing**, you have to specify the default usage start date.
Default Usage End Date	Used to specify the date till when the price item was used. The default usage end date is used when the end date is not specified for a record in the usage data file. By default, the current date appears in this field. You can change the default usage end date, if required. **Note:** You can either manually specify the date or select it using the **Date Picker** ( ) icon corresponding to the field. If you have selected the billing method as **Adhoc Billing**, this field appears in read-only mode and displays the default usage end date as defined for the selected file group. If you have selected the billing method as **Regular Billing** then this field is enabled displaying the current date. The default usage end date cannot be earlier than the default usage start date.	Yes (Conditional) **Note:** If you select the billing method as **Regular Billing**, you have to specify the default usage end date.
File Type	Used to specify the type of usage data file.	Yes
Replace Existing File	Used to indicate that you want to replace any existing file in the system.	Yes
File Name	Used to specify the name and path of the usage data file that you want to upload. **Note:** You can also click the **Browse** button corresponding to this field to browse to the location where the usage data file is available in the system.	Yes

4. Select the **Replace Existing File** check box.

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Note: You can replace an existing file when the usage records of a usage data file are in any of the statuses:

- **Valid** and/or **Invalid**
- **Rejected**
- **Cancelled**

In other words, you cannot replace a file when the billable charges are already created for the usage records of a usage data file, or are pending for approval with the approver.

5. Click the **Browse** button corresponding to the **File Name** field.
   The **Choose File to Upload** dialog box appears.
6. Browse to the location where the usage data file that you want to replace is available.
7. Click **Open**.
   The usage data file name and path appears in the **File Name** field.
8. Click **Upload**.

   A message appears indicating that the usage data file has been uploaded successfully. If an error occurs while parsing, the usage data file is not uploaded in the system.

Note:

The validation process starts immediately after the file is uploaded in the system. If a usage record is successfully validated, the status of the usage record is changed to **Valid**. And, if a usage record could not pass through the validation process, the status of the usage record is changed to **Invalid**. You can view the details of the uploaded file and its records in the **Usage Data Processing** screen.

If the usage data file size exceeds the file size limit set in the **C1-ODBFC** feature configuration, a batch job is created using the **Upload and Validate Usage Data File (C1-ODFU)** batch. A message appears indicating the batch job ID. This batch job uploads and validates the usage data file. You can change the file size limit using the **On Demand Billing (C1-ODBFC)** feature configuration. For more information on the **Upload and Validate Usage Data File (C1-ODFU)** batch, see *Oracle Revenue Management and Billing Batch Execution Guide*.

The number of usage records that are parsed and mapped in an XML file depends on the value defined for the **Staging XML Size** option type in the **On Demand Billing (C1-ODBFC)** feature configuration. For example, if the **Staging XML Size** option type is set to 100 and a usage data file contains 500 records, then the system creates 5 XML files - each containing 100 records.

If a batch job is created automatically, the number of usage records that are validated in each work unit depends on the value defined for the **Validation Chunk Size** option type in the **On Demand Billing (C1-ODBFC)** feature configuration.

On successful completion of the **Upload and Validate Usage Data File (C1-ODFU)** batch, a To Do entry is created using the **C1-ODFU** To Do type. You can view this To Do entry when you are assigned a To Do role which is mapped to the **C1-ODFU** To Do type. This To Do indicates whether the batch was successfully executed or not. If the batch was successfully executed, it indicates the following:

- Number of records that were uploaded in the system
- Number of records which were successfully validated
- Number of records which could not pass through the validation process
- Number of records which failed to validate due to some technical reasons

9. Click **OK** in the message box.

   Once a usage record is successfully validated, the status of the usage record is changed to **Valid**. And, if a usage record could not pass through the validation process, the status of the usage record is changed to **Invalid**.

Related Topics

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For more information on...	See...
Usage Data Processing screen	Usage Data Processing on page 4352
Search zone	Search on page 4352

Viewing All Records of a Usage Data File

Procedure

To view all records of a usage data file:

1. Search for the usage data file in the **Usage Data Processing** screen.
2. In the **Search Results** section, click the link in the **Total** column corresponding to the usage data file whose *r*ecords you want to view.

   The **Usage Data** screen appears. It contains the following two sections:

   - **Search Criteria** - This section allows you to filter the usage records based on the various search criteria. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
File Name	Displays the name of the usage data file.	Not applicable
File Type	Indicates the type of the usage data file.	Not applicable
Default Usage Start Date	Displays the usage start date entered while uploading the usage data file.	Not applicable
Default Usage End Date	Displays the usage end date entered while uploading the usage data file.	Not applicable
Usage Record Status	Used to filter the usage data records based on their status. The valid values are: • Valid • Invalid • Submitted for Approval • Processed • Rejected • Cancelled	No
Division	Used to filter the usage data records based on their division.	No
Account Identifier Type	Used to filter the usage data records based on the type of account identifier.	Yes (Conditional) **Note:** If you enter the account identifier as a search criteria, you have to enter the account identifier type.
Account Identifier	Used to filter the usage data records based on the account identifier value.	Yes (Conditional)

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Field Name	Field Description	Mandatory (Yes or No)
		Note: If you enter the account identifier type as a search criteria, you have to enter the account identifier.

- **Search Results** - By default, all records of the usage data file are listed in the **Search Results** section. You can filter the search results based on the specified criteria. the **Search Results** section contains the following columns:

Column Name	Column Description
BILLABLE CHARGE ID	Indicates the billable charge which is generated for the usage record. **Note:** This column appears only for the valid records for which billable charges have been created.
ACCOUNT ID TYPE	Indicates the account identifier type.
ACCOUNT IDENTIFIER	Indicates the account to which the usage record belongs.
ACCOUNT INFORMATION	Displays information about the account.
DIVISION	Indicates the division to which the usage record belongs.
CONTRACT	Displays the contract ID. **Note:** This column appears only if usage data files are uploaded for the insurance module.
BILL PERIOD	Displays the billing period for which the usage data is applicable.
RECURRING FLAG	Indicates whether the billable charge is recurring.
FREQUENCY	Displays the frequency of the recurring bill.
CHARGE TYPE CODE	Indicates the charge type. **Note:** This column appears only if usage data files are uploaded for the insurance module.
START DATE	Displays the date from when the price item was used. **Note:** If the start date is not available, the default usage start date appears in this column.
END DATE	Displays the date till when the price item was used. **Note:** If the end date is not available, the default usage end date appears in this column.
DESCRIPTION	Displays the description of the usage record. It is shown on the billable charge.
PRICE ITEM	Displays the price item code.
VARIANCE	Indicates the variance that must be used along with the price item for determining the price item pricing.

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Column Name	Column Description
	Note: This column appears when the **Multi Price Parameter** option type of the **Multi Parameter Based Pricing (C1_PPARM_FLG)** feature configuration is set to **False**.
PARAM TYPE1, PARAM TYPE2, ..., PARAM TYPE15	Indicates the price item parameter that must be used along with the price item for determining the price item pricing.
	Note: These columns appear when the **Multi Price Parameter** option type of the **Multi Parameter Based Pricing (C1_PPARM_FLG)** feature configuration is set to **True**.
PARAM VALUE1, PARAM VALUE2, ..., PARAM VALUE15	Displays the value of the price item parameter.
	Note: These columns appear when the **Multi Price Parameter** option type of the **Multi Parameter Based Pricing (C1_PPARM_FLG)** feature configuration is set to **True**.
SQI1, SQI2, ..., SQI10	Indicates the service quantity identifier that must be used for calculating the price item charges.
SQIVALUE1, SQIVALUE2, ..., SQIVALUE10	Displays the number of units of the service quantity.
BILL LINE DESCRIPTION1, BILL LINE DESCRIPTION2, ..., BILL LINE DESCRIPTION10	Displays the description of the line item (charge).
AMOUNT1, AMOUNT2, ..., AMOUNT10	Displays the charge amount.
CURRENCY1, CURRENCY2, ..., CURRENCY10	Displays the currency in which the amount is charged.
MEMO ONLY1, MEMO ONLY2, ..., MEMO ONLY10	Indicates whether the charge should be included in the bill amount or not.
SUMMARY1, SUMMARY2, ..., SUMMARY10	Indicates whether the charge should be included in the summary line or not.
SHOW ON BILL1, SHOW ON BILL2, ..., SHOW ON BILL10	Indicates whether the charge should appear on the person's printed bill or not.
GL DISTRIBUTION CODE 1, GL DISTRIBUTION CODE 2, ..., GL DISTRIBUTION CODE 10	Displays the distribution code which indicates the GL account associated with the charge.
CHARTYPE1, CHARTYPE2, ..., CHARTYPE10	Indicates the characteristic that must be defined for the billable charge.
CHARVAL1, CHARVAL2, ..., CHARVAL10	Displays the value of the characteristic type.

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Column Name	Column Description
REASON	Displays the reason associated with the usage data.
COMMENTS	Displays comments or additional details related to the usage data.

Note:

If you have defined business labels for usage data fields, the columns will appear with the business labels defined for the respective column.

Only those columns that contain data in the CSV file appear in the **Usage Data** screen. For example, if information about characteristics is provided in the CHARTYPE4 and CHARVAL4 columns of the CSV file, then only the CHARTYPE4 and CHARVAL4 columns appear in the **Usage Data** screen. Similarly, if information about the line item (charge) is provided in the BILL LINE DESCRIPTION6, AMOUNT6, CURRENCY6, MEMO ONLY6, SUMMARY6, SHOW ON BILL6, and GL DISTRIBUTION CODE 6 columns of the CSV file, then only the BILL LINE DESCRIPTION6, AMOUNT6, CURRENCY6, MEMO ONLY6, SUMMARY6, SHOW ON BILL6, AND GL DISTRIBUTION CODE 6 columns appear in the **Usage Data** screen.

Note:

Pagination is used to display limited number of records in the **Search Results** section. You can change the number of records displayed per page, if required. You can use the navigation buttons, such as **First** (<<), **Previous** (<), **Next** (>), and **Last** (>>) to navigate between pages. You can also select the page to which you want to navigate from the **Go To** list.

Note: You can download details of all the records of a usage data file in a CSV file format using the **Export To Excel** link provided in the **Search** section.

3. View the records of the usage data file in the **Usage Data** screen.
4. If required, you can change the number of records displayed per page.

Note: By default, the number of records that appear in each page depends on the minimum value defined in the **PAGE_NUMBER** lookup field. For example, if the **PAGE_NUMBER** lookup field has four values - 10, 20, 30, and 40, then the number of records displayed in each page, by default, would be 10.

5. If required, you can click the **First** (<<), **Previous** (<), **Next** (>), and **Last** (>>) buttons to *n*avigate between pages.
6. If required, you can filter the usage records in the **Usage Data** screen.
7. If required, you can click the **Export To Excel** link to download details of all the records of a usage data file *i*n a CSV file format.

Related Topics

For more information on...	See...
How to search for a usage data file	Searching for a Usage Data File on page 4355
How to filter the usage records	Filtering Usage Records on page 4402

Viewing Valid Records of a Usage Data File

Procedure

To view valid records of a usage data file:

1. Search for the usage data file in the **Usage Data Processing** screen.

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2. In the **Search Results** section, click the link in the **Valid** column corresponding to the usage data file whose *v*alid records you want to view.

   The **Usage Data** screen appears. It contains the following two sections:

   - **Search Criteria** - This section allows you to filter the valid records based on the various search criteria. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
File Name	Displays the name of the usage data file.	Not applicable
File Type	Indicates the type of the usage data file.	Not applicable
Default Usage Start Date	Displays the usage start date entered while uploading the usage data file.	Not applicable
Default Usage End Date	Displays the usage end date entered while uploading the usage data file.	Not applicable
Status	Indicates that all valid records are displayed in the **Usage Data** screen.	Not applicable
Division	Used to filter the usage data records based on their division.	No
Account Identifier Type	Used to filter the usage data records based on the type of account identifier.	Yes (Conditional) **Note:** If you enter the account identifier as a search criteria, you have to enter the account identifier type.
Account Identifier	Used to filter the usage data records based on the account identifier value.	Yes (Conditional) **Note:** If you enter the account identifier type as a search criteria, you have to enter the account identifier.

   - **Search Results** - By default, all valid records of the usage data file are listed in the **Search Results** section. You can filter the search results based on the specified criteria. the **Search Results** section contains the following columns:

Column Name	Column Description
ACCOUNT ID TYPE	Indicates the account identifier type.
ACCOUNT IDENTIFIER	Indicates the account to which the usage record belongs.
ACCOUNT INFORMATION	Displays information about the account.
DIVISION	Indicates the division to which the usage record belongs.
CONTRACT	Displays the contract ID. **Note:** This column appears only if usage data files are uploaded for the insurance module.
BILL PERIOD	Displays the billing period for which the usage data is applicable.

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Column Name	Column Description
RECURRING FLAG	Indicates whether the billable charge is recurring.
FREQUENCY	Displays the frequency of the recurring bill.
CHARGE TYPE	Indicates the charge type. **Note:** This column appears only if usage data files are uploaded for the insurance module.
START DATE	Displays the date from when the price item was used. **Note:** If the start date is not available, the default usage start date appears in this column.
END DATE	Displays the date till when the price item was used. **Note:** If the end date is not available, the default usage end date appears in this column.
DESCRIPTION	Displays the description of the usage record. It is shown on the billable charge.
PRICE ITEM	Displays the price item code.
VARIANCE	Indicates the variance that must be used along with the price item for determining the price item pricing. **Note:** This column appears when the **Multi Price Parameter** option type of the **Multi Parameter Based Pricing (C1_PPARM_FLG)** feature configuration is set to **False**.
PARAM TYPE1, PARAM TYPE2, ..., PARAM TYPE15	Indicates the price item parameter that must be used along with the price item for determining the price item pricing. **Note:** These columns appear when the **Multi Price Parameter** option type of the **Multi Parameter Based Pricing (C1_PPARM_FLG)** feature configuration is set to **True**.
PARAM VALUE1, PARAM VALUE2, ..., PARAM VALUE15	Displays the value of the price item parameter. **Note:** These columns appear when the **Multi Price Parameter** option type of the **Multi Parameter Based Pricing (C1_PPARM_FLG)** feature configuration is set to **True**.
SQI1, SQI2, ..., SQI10	Indicates the service quantity identifier that must be used for calculating the price item charges.
SQIVALUE1, SQIVALUE2, ..., SQIVALUE10	Displays the number of units of the service quantity.
BILL LINE DESCRIPTION1, BILL LINE DESCRIPTION2, ..., BILL LINE DESCRIPTION10	Displays the description of the line item (charge).

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Column Name	Column Description
AMOUNT1, AMOUNT2, ..., AMOUNT10	Displays the charge amount.
CURRENCY1, CURRENCY2, ..., CURRENCY10	Displays the currency in which the amount is charged.
MEMO ONLY1, MEMO ONLY2, ..., MEMO ONLY10	Indicates whether the charge should be included in the bill amount or not.
SUMMARY1, SUMMARY2, ..., SUMMARY10	Indicates whether the charge should be included in the summary line or not.
SHOW ON BILL1, SHOW ON BILL2, ..., SHOW ON BILL10	Indicates whether the charge should appear on the person's printed bill or not.
GL DISTRIBUTION CODE 1, GL DISTRIBUTION CODE 2, ..., GL DISTRIBUTION CODE 10	Displays the distribution code which indicates the GL account associated with the charge.
CHARTYPE1, CHARTYPE2, ..., CHARTYPE10	Indicates the characteristic that must be defined for the billable charge.
CHARVAL1, CHARVAL2, ..., CHARVAL10	Displays the value of the characteristic type.
REASON	Displays the reason associated with the usage data.
COMMENTS	Displays comments or additional details related to the usage data.

Note:

If you have defined business labels for usage data fields, the columns will appear with the business labels defined for the respective column.

Only those columns that contain data in the CSV file appear in the **Usage Data** screen. For example, if information about characteristics is provided in the CHARTYPE4 and CHARVAL4 columns of the CSV file, then only the CHARTYPE4 and CHARVAL4 columns appear in the **Usage Data** screen. Similarly, if information about the line item (charge) is provided in the BILL LINE DESCRIPTION6, AMOUNT6, CURRENCY6, MEMO ONLY6, SUMMARY6, SHOW ON BILL6, and GL DISTRIBUTION CODE 6 columns of the CSV file, then only the BILL LINE DESCRIPTION6, AMOUNT6, CURRENCY6, MEMO ONLY6, SUMMARY6, SHOW ON BILL6, AND GL DISTRIBUTION CODE 6 columns appear in the **Usage Data** screen.

Note:

Pagination is used to display limited number of records in the **Search Results** section. You can change the number of records displayed per page, if required. You can use the navigation buttons, such as **First** (<<), **Previous** (<), **Next** (>), and **Last** (>>) to navigate between pages. You can also select the page to which you want to navigate from the **Go To** list.

3. View the valid records of the usage data file in the **Usage Data** screen.
4. If required, you can change the number of records displayed per page.

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> **Note:** By default, the number of records that appear in each page depends on the minimum value defined in the **PAGE_NUMBER** lookup field. For example, if the **PAGE_NUMBER** lookup field has four values - 10, 20, 30, and 40, then the number of records displayed in each page, by default, would be 10.

5. If required, you can click the **First** (<<), **Previous** (<), **Next** (>), and **Last** (>>) buttons to *n*avigate between pages.
6. If required, you can filter the valid records in the **Usage Data** screen.

Related Topics

For more information on...	See...
How to search for a usage data file	Searching for a Usage Data File on page 4355
How to filter the usage records	Filtering Usage Records on page 4402

Viewing Invalid Records of a Usage Data File

Procedure

To view invalid records of a usage data file:

1. Search for the usage data file in the **Usage Data Processing** screen.
2. In the **Search Results** section, click the link in the **Invalid** column corresponding to the usage data file whose *i*nvalid records you want to view.

   The **Usage Data** screen appears. It contains the following two sections:

   - **Search Criteria** - This section allows you to filter the invalid records based on the various search criteria. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
File Name	Displays the name of the usage data file.	Not applicable
File Type	Indicates the type of the usage data file.	Not applicable
Default Usage Start Date	Displays the usage start date entered while uploading the usage data file.	Not applicable
Default Usage End Date	Displays the usage end date entered while uploading the usage data file.	Not applicable
Status	Indicates that all invalid records are displayed in the **Usage Data** screen.	Not applicable
Division	Used to filter the usage data records based on their division.	No
Account Identifier Type	Used to filter the usage data records based on the type of account identifier.	Yes (Conditional) **Note:** If you enter the account identifier as a search criteria, you have to enter the account identifier type.
Account Identifier	Used to filter the usage data records based on the account identifier value.	Yes (Conditional)

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Field Name	Field Description	Mandatory (Yes or No)
		Note: If you enter the account identifier type as a search criteria, you have to enter the account identifier.

- **Search Results** - By default, all invalid records of the usage data file are listed in the **Search Results** section. You can filter the search results based on the specified criteria. the **Search Results** section contains the following columns:

Column Name	Column Description
ACCOUNT ID TYPE	Indicates the account identifier type.
ACCOUNT IDENTIFIER	Indicates the account to which the usage record belongs.
ACCOUNT INFORMATION	Displays information about the account.
DIVISION	Indicates the division to which the usage record belongs.
CONTRACT	Displays the contract ID. **Note:** This column appears only if usage data files are uploaded for the insurance module.
BILL PERIOD	Displays the billing period for which the usage data is applicable.
RECURRING FLAG	Indicates whether the billable charge is recurring.
FREQUENCY	Displays the frequency of the recurring bill.
CHARGE TYPE	Indicates the charge type. **Note:** This column appears only if usage data files are uploaded for the insurance module.
START DATE	Displays the date from when the price item was used. **Note:** If the start date is not available, the default usage start date appears in this column.
END DATE	Displays the date till when the price item was used. **Note:** If the end date is not available, the default usage end date appears in this column.
DESCRIPTION	Displays the description of the usage record. It is shown on the billable charge.
PRICE ITEM	Displays the price item code.
VARIANCE	Indicates the variance that must be used along with the price item for determining the price item pricing. **Note:** This column appears when the **Multi Price Parameter** option type of the **Multi Parameter Based Pricing (C1_PPARM_FLG)** feature configuration is set to **False**.

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Column Name	Column Description
PARAM TYPE1, PARAM TYPE2, ..., PARAM TYPE15	Indicates the price item parameter that must be used along with the price item for determining the price item pricing. **Note:** These columns appear when the **Multi Price Parameter** option type of the **Multi Parameter Based Pricing (C1_PPARM_FLG)** feature configuration is set to **True**.
PARAM VALUE1, PARAM VALUE2, ..., PARAM VALUE15	Displays the value of the price item parameter. **Note:** These columns appear when the **Multi Price Parameter** option type of the **Multi Parameter Based Pricing (C1_PPARM_FLG)** feature configuration is set to **True**.
SQI1, SQI2, ..., SQI10	Indicates the service quantity identifier that must be used for calculating the price item charges.
SQIVALUE1, SQIVALUE2, ..., SQIVALUE10	Displays the number of units of the service quantity.
BILL LINE DESCRIPTION1, BILL LINE DESCRIPTION2, ..., BILL LINE DESCRIPTION10	Displays the description of the line item (charge).
AMOUNT1, AMOUNT2, ..., AMOUNT10	Displays the charge amount.
CURRENCY1, CURRENCY2, ..., CURRENCY10	Displays the currency in which the amount is charged.
MEMO ONLY1, MEMO ONLY2, ..., MEMO ONLY10	Indicates whether the charge should be included in the bill amount or not.
SUMMARY1, SUMMARY2, ..., SUMMARY10	Indicates whether the charge should be included in the summary line or not.
SHOW ON BILL1, SHOW ON BILL2, ..., SHOW ON BILL10	Indicates whether the charge should appear on the person's printed bill or not.
GL DISTRIBUTION CODE 1, GL DISTRIBUTION CODE 2, ..., GL DISTRIBUTION CODE 10	Displays the distribution code which indicates the GL account associated with the charge.
CHARTYPE1, CHARTYPE2, ..., CHARTYPE10	Indicates the characteristic that must be defined for the billable charge.
CHARVAL1, CHARVAL2, ..., CHARVAL10	Displays the value of the characteristic type.
REASON	Displays the reason associated with the usage data.
COMMENTS	Displays comments or additional details related to the usage data.

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> **Note:**
>
> If you have defined business labels for usage data fields, the columns will appear with the business labels defined for the respective column.
>
> Only those columns that contain data in the CSV file appear in the **Usage Data** screen. For example, if information about characteristics is provided in the CHARTYPE4 and CHARVAL4 columns of the CSV file, then only the CHARTYPE4 and CHARVAL4 columns appear in the **Usage Data** screen. Similarly, if information about the line item (charge) is provided in the BILL LINE DESCRIPTION6, AMOUNT6, CURRENCY6, MEMO ONLY6, SUMMARY6, SHOW ON BILL6, and GL DISTRIBUTION CODE 6 columns of the CSV file, then only the BILL LINE DESCRIPTION6, AMOUNT6, CURRENCY6, MEMO ONLY6, SUMMARY6, SHOW ON BILL6, AND GL DISTRIBUTION CODE 6 columns appear in the **Usage Data** screen.

> **Note:**
>
> Pagination is used to display limited number of records in the **Search Results** section. You can change the number of records displayed per page, if required. You can use the navigation buttons, such as **First** (<<), **Previous** (<), **Next** (>), and **Last** (>>) to navigate between pages. You can also select the page to which you want to navigate from the **Go To** list.

3. View the invalid records of the usage data file in the **Usage Data** screen.
4. If required, you can change the number of records displayed per page.

> **Note:** By default, the number of records that appear in each page depends on the minimum value defined in the **PAGE_NUMBER** lookup field. For example, if the **PAGE_NUMBER** lookup field has four values - 10, 20, 30, and 40, then the number of records displayed in each page, by default, would be 10.

5. If required, you can click the **First** (<<), **Previous** (<), **Next** (>), and **Last** (>>) buttons to *n*avigate between pages.
6. If required, you can filter the invalid records in the **Usage Data** screen.

Related Topics

For more information on...	See...
How to search for a usage data file	Searching for a Usage Data File on page 4355
How to filter the usage records	Filtering Usage Records on page 4402

Viewing Submitted Records of a Usage Data File

Procedure

To view submitted records of a usage data file:

1. Search for the usage data file in the **Usage Data Processing** screen.
2. In the **Search Results** section, click the link in the **Submitted** column corresponding to the usage data file *w*hose submitted records you want to view.

   The **Usage Data** screen appears. It contains the following two sections:

   - **Search Criteria** - This section allows you to filter the submitted records based on the various search criteria. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
File Name	Displays the name of the usage data file.	Not applicable

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Field Name	Field Description	Mandatory (Yes or No)
File Type	Indicates the type of the usage data file.	Not applicable
Default Usage Start Date	Displays the usage start date entered while uploading the usage data file.	Not applicable
Default Usage End Date	Displays the usage end date entered while uploading the usage data file.	Not applicable
Usage Record Status	Indicates that all records submitted for approval are displayed in the **Usage Data** screen.	Not applicable
Division	Used to filter the usage data records based on their division.	No
Account Identifier Type	Used to filter the usage data records based on the type of account identifier.	Yes (Conditional) **Note:** If you enter the account identifier as a search criteria, you have to enter the account identifier type.
Account Identifier	Used to filter the usage data records based on the account identifier value.	Yes (Conditional) **Note:** If you enter the account identifier type as a search criteria, you have to enter the account identifier.

- **Search Results** - By default, all submitted records of the usage data file are listed in the **Search Results** section. You can filter the search results based on the specified criteria. the **Search Results** section contains the following columns:

Column Name	Column Description
BILLABLE CHARGE ID	Indicates the billable charge which is generated for the usage record.
ACCOUNT ID TYPE	Indicates the account identifier type.
ACCOUNT IDENTIFIER	Indicates the account to which the usage record belongs.
ACCOUNT INFORMATION	Displays information about the account.
DIVISION	Indicates the division to which the usage record belongs.
CONTRACT	Displays the contract ID. **Note:** This column appears only if usage data files are uploaded for the insurance module.
BILL PERIOD	Displays the billing period for which the usage data is applicable.
RECURRING FLAG	Indicates whether the billable charge is recurring.
FREQUENCY	Displays the frequency of the recurring bill.
CHARGE TYPE	Indicates the charge type. **Note:** This column appears only if usage data files are uploaded for the insurance module.

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Column Name	Column Description
START DATE	Displays the date from when the price item was used. **Note:** If the start date is not available, the default usage start date appears in this column.
END DATE	Displays the date till when the price item was used. **Note:** If the end date is not available, the default usage end date appears in this column.
DESCRIPTION	Displays the description of the usage record. It is shown on the billable charge.
PRICE ITEM	Displays the price item code.
VARIANCE	Indicates the variance that must be used along with the price item for determining the price item pricing. **Note:** This column appears when the **Multi Price Parameter** option type of the **Multi Parameter Based Pricing (C1_PPARM_FLG)** feature configuration is set to **False**.
PARAM TYPE1, PARAM TYPE2, ..., PARAM TYPE15	Indicates the price item parameter that must be used along with the price item for determining the price item pricing. **Note:** These columns appear when the **Multi Price Parameter** option type of the **Multi Parameter Based Pricing (C1_PPARM_FLG)** feature configuration is set to **True**.
PARAM VALUE1, PARAM VALUE2, ..., PARAM VALUE15	Displays the value of the price item parameter. **Note:** These columns appear when the **Multi Price Parameter** option type of the **Multi Parameter Based Pricing (C1_PPARM_FLG)** feature configuration is set to **True**.
SQI1, SQI2, ..., SQI10	Indicates the service quantity identifier that must be used for calculating the price item charges.
SQIVALUE1, SQIVALUE2, ..., SQIVALUE10	Displays the number of units of the service quantity.
BILL LINE DESCRIPTION1, BILL LINE DESCRIPTION2, ..., BILL LINE DESCRIPTION10	Displays the description of the line item (charge).
AMOUNT1, AMOUNT2, ..., AMOUNT10	Displays the charge amount.
CURRENCY1, CURRENCY2, ..., CURRENCY10	Displays the currency in which the amount is charged.
MEMO ONLY1, MEMO ONLY2, ..., MEMO ONLY10	Indicates whether the charge should be included in the bill amount or not.

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Column Name	Column Description
SUMMARY1, SUMMARY2, ..., SUMMARY10	Indicates whether the charge should be included in the summary line or not.
SHOW ON BILL1, SHOW ON BILL2, ..., SHOW ON BILL10	Indicates whether the charge should appear on the person's printed bill or not.
GL DISTRIBUTION CODE 1, GL DISTRIBUTION CODE 2, ..., GL DISTRIBUTION CODE 10	Displays the distribution code which indicates the GL account associated with the charge.
CHARTYPE1, CHARTYPE2, ..., CHARTYPE10	Indicates the characteristic that must be defined for the billable charge.
CHARVAL1, CHARVAL2, ..., CHARVAL10	Displays the value of the characteristic type.
REASON	Displays the reason associated with the usage data.
COMMENTS	Displays comments or additional details related to the usage data.

Note:

If you have defined business labels for usage data fields, the columns will appear with the business labels defined for the respective column.

Only those columns that contain data in the CSV file appear in the **Usage Data** screen. For example, if information about characteristics is provided in the CHARTYPE4 and CHARVAL4 columns of the CSV file, then only the CHARTYPE4 and CHARVAL4 columns appear in the **Usage Data** screen. Similarly, if information about the line item (charge) is provided in the BILL LINE DESCRIPTION6, AMOUNT6, CURRENCY6, MEMO ONLY6, SUMMARY6, SHOW ON BILL6, and GL DISTRIBUTION CODE 6 columns of the CSV file, then only the BILL LINE DESCRIPTION6, AMOUNT6, CURRENCY6, MEMO ONLY6, SUMMARY6, SHOW ON BILL6, AND GL DISTRIBUTION CODE 6 columns appear in the **Usage Data** screen.

Note:

Pagination is used to display limited number of records in the **Search Results** section. You can change the number of records displayed per page, if required. You can use the navigation buttons, such as **First** (<<), **Previous** (<), **Next** (>), and **Last** (>>) to navigate between pages. You can also select the page to which you want to navigate from the **Go To** list.

3. View the submitted records of the usage data file in the **Usage Data** screen.
4. If required, you can change the number of records displayed per page.

Note: By default, the number of records that appear in each page depends on the minimum value defined in the **PAGE_NUMBER** lookup field. For example, if the **PAGE_NUMBER** lookup field has four values - 10, 20, 30, and 40, then the number of records displayed in each page, by default, would be 10.

5. If required, you can click the **First** (<<), **Previous** (<), **Next** (>), and **Last** (>>) buttons to *n*avigate between pages.
6. If required, you can filter the submitted records in the **Usage Data** screen.

Related Topics

For more information on...	See...
How to search for a usage data file	Searching for a Usage Data File on page 4355

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For more information on...	See...
How to filter the usage records	Filtering Usage Records on page 4402

Viewing Processed Records of a Usage Data File

Procedure

To view processed records of a usage data file:

1. Search for the usage data file in the **Usage Data Processing** screen.
2. In the **Search Results** section, click the link in the **Processed** column corresponding to the usage data file *w*hose processed records you want to view.

   The **Usage Data** screen appears. It contains the following two sections:

   - **Search Criteria** - This section allows you to filter the processed records based on the various search criteria. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
File Name	Displays the name of the usage data file.	Not applicable
File Type	Indicates the type of the usage data file.	Not applicable
Default Usage Start Date	Displays the usage start date entered while uploading the usage data file.	Not applicable
Default Usage End Date	Displays the usage end date entered while uploading the usage data file.	Not applicable
Usage Record Status	Indicates that all processed records are displayed in the **Usage Data** screen.	Not applicable
Division	Used to filter the usage data records based on their division.	No
Account Identifier Type	Used to filter the usage data records based on the type of account identifier.	Yes (Conditional) **Note:** If you enter the account identifier as a search criteria, you have to enter the account identifier type.
Account Identifier	Used to filter the usage data records based on the account identifier value.	Yes (Conditional) **Note:** If you enter the account identifier type as a search criteria, you have to enter the account identifier.

   - **Search Results** - By default, all processed records of the usage data file are listed in the **Search Results** section. You can filter the search results based on the specified criteria. the **Search Results** section contains the following columns:

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Column Name	Column Description
BILLABLE CHARGE ID	Indicates the billable charge which is generated for the usage record.
ACCOUNT ID TYPE	Indicates the account identifier type.
ACCOUNT IDENTIFIER	Indicates the account to which the usage record belongs.
ACCOUNT INFORMATION	Displays information about the account.
DIVISION	Indicates the division to which the usage record belongs.
CONTRACT	Displays the contract ID. **Note:** This column appears only if usage data files are uploaded for the insurance module.
BILL PERIOD	Displays the billing period for which the usage data is applicable.
RECURRING FLAG	Indicates whether the billable charge is recurring.
FREQUENCY	Displays the frequency of the recurring bill.
CHARGE TYPE	Indicates the charge type. **Note:** This column appears only if usage data files are uploaded for the insurance module.
START DATE	Displays the date from when the price item was used. **Note:** If the start date is not available, the default usage start date appears in this column.
END DATE	Displays the date till when the price item was used. **Note:** If the end date is not available, the default usage end date appears in this column.
DESCRIPTION	Displays the description of the usage record. It is shown on the billable charge.
PRICE ITEM	Displays the price item code.
VARIANCE	Indicates the variance that must be used along with the price item for determining the price item pricing. **Note:** This column appears when the **Multi Price Parameter** option type of the **Multi Parameter Based Pricing (C1_PPARM_FLG)** feature configuration is set to **False**.
PARAM TYPE1, PARAM TYPE2, ..., PARAM TYPE15	Indicates the price item parameter that must be used along with the price item for determining the price item pricing. **Note:** These columns appear when the **Multi Price Parameter** option type of the **Multi Parameter Based Pricing (C1_PPARM_FLG)** feature configuration is set to **True**.

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Column Name	Column Description
PARAM VALUE1, PARAM VALUE2, ..., PARAM VALUE15	Displays the value of the price item parameter. **Note:** These columns appear when the **Multi Price Parameter** option type of the **Multi Parameter Based Pricing (C1_PPARM_FLG)** feature configuration is set to **True**.
SQI1, SQI2, ..., SQI10	Indicates the service quantity identifier that must be used for calculating the price item charges.
SQIVALUE1, SQIVALUE2, ..., SQIVALUE10	Displays the number of units of the service quantity.
BILL LINE DESCRIPTION1, BILL LINE DESCRIPTION2, ..., BILL LINE DESCRIPTION10	Displays the description of the line item (charge).
AMOUNT1, AMOUNT2, ..., AMOUNT10	Displays the charge amount.
CURRENCY1, CURRENCY2, ..., CURRENCY10	Displays the currency in which the amount is charged.
MEMO ONLY1, MEMO ONLY2, ..., MEMO ONLY10	Indicates whether the charge should be included in the bill amount or not.
SUMMARY1, SUMMARY2, ..., SUMMARY10	Indicates whether the charge should be included in the summary line or not.
SHOW ON BILL1, SHOW ON BILL2, ..., SHOW ON BILL10	Indicates whether the charge should appear on the person's printed bill or not.
GL DISTRIBUTION CODE 1, GL DISTRIBUTION CODE 2, ..., GL DISTRIBUTION CODE 10	Displays the distribution code which indicates the GL account associated with the charge.
CHARTYPE1, CHARTYPE2, ..., CHARTYPE10	Indicates the characteristic that must be defined for the billable charge.
CHARVAL1, CHARVAL2, ..., CHARVAL10	Displays the value of the characteristic type.
REASON	Displays the reason associated with the usage data.
COMMENTS	Displays comments or additional details related to the usage data.

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> **Note:**
>
> If you have defined business labels for usage data fields, the columns will appear with the business labels defined for the respective column.
>
> Only those columns that contain data in the CSV file appear in the **Usage Data** screen. For example, if information about characteristics is provided in the CHARTYPE4 and CHARVAL4 columns of the CSV file, then only the CHARTYPE4 and CHARVAL4 columns appear in the **Usage Data** screen. Similarly, if information about the line item (charge) is provided in the BILL LINE DESCRIPTION6, AMOUNT6, CURRENCY6, MEMO ONLY6, SUMMARY6, SHOW ON BILL6, and GL DISTRIBUTION CODE 6 columns of the CSV file, then only the BILL LINE DESCRIPTION6, AMOUNT6, CURRENCY6, MEMO ONLY6, SUMMARY6, SHOW ON BILL6, AND GL DISTRIBUTION CODE 6 columns appear in the **Usage Data** screen.

> **Note:**
>
> Pagination is used to display limited number of records in the **Search Results** section. You can change the number of records displayed per page, if required. You can use the navigation buttons, such as **First** (<<), **Previous** (<), **Next** (>), and **Last** (>>) to navigate between pages. You can also select the page to which you want to navigate from the **Go To** list.

3. View the processed records of the usage data file in the **Usage Data** screen.
4. If required, you can change the number of records displayed per page.

> **Note:** By default, the number of records that appear in each page depends on the minimum value defined in the **PAGE_NUMBER** lookup field. For example, if the **PAGE_NUMBER** lookup field has four values - 10, 20, 30, and 40, then the number of records displayed in each page, by default, would be 10.

5. If required, you can click the **First** (<<), **Previous** (<), **Next** (>), and **Last** (>>) buttons to *n*avigate between pages.
6. If required, you can filter the processed records in the **Usage Data** screen.

Related Topics

For more information on...	See...
How to search for a usage data file	Searching for a Usage Data File on page 4355
How to filter the usage records	Filtering Usage Records on page 4402

Viewing Cancelled Records of a Usage Data File

Procedure

To view cancelled records of a usage data file:

1. Search for the usage data file in the **Usage Data Processing** screen.
2. In the **Search Results** section, click the link in the **Cancelled** column corresponding to the usage data file *w*hose cancelled records you want to view.

   The **Usage Data** screen appears. It contains the following two sections:

   - **Search Criteria** - This section allows you to filter the cancelled records based on the various search criteria. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
File Name	Displays the name of the usage data file.	Not applicable

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Field Name	Field Description	Mandatory (Yes or No)
File Type	Indicates the type of the usage data file.	Not applicable
Default Usage Start Date	Displays the usage start date entered while uploading the usage data file.	Not applicable
Default Usage End Date	Displays the usage end date entered while uploading the usage data file.	Not applicable
Usage Record Status	Indicates that all cancelled records are displayed in the **Usage Data** screen.	Not applicable
Division	Used to filter the usage data records based on their division.	No
Account Identifier Type	Used to filter the usage data records based on the type of account identifier.	Yes (Conditional) **Note:** If you enter the account identifier as a search criteria, you have to enter the account identifier type.
Account Identifier	Used to filter the usage data records based on the account identifier value.	Yes (Conditional) **Note:** If you enter the account identifier type as a search criteria, you have to enter the account identifier.

- **Search Results** - By default, all cancelled records of the usage data file are listed in the **Search Results** section. You can filter the search results based on the specified criteria. the **Search Results** section contains the following columns:

Column Name	Column Description
BILLABLE CHARGE ID	Indicates the billable charge which is generated for the usage record. **Note:** This column appears only if you have cancelled a valid record for which billable charges have been created.
ACCOUNT ID TYPE	Indicates the account identifier type.
ACCOUNT IDENTIFIER	Indicates the account to which the usage record belongs.
ACCOUNT INFORMATION	Displays information about the account.
DIVISION	Indicates the division to which the usage record belongs.
CONTRACT	Displays the contract ID. **Note:** This column appears only if usage data files are uploaded for the insurance module.
BILL PERIOD	Displays the billing period for which the usage data is applicable.
RECURRING FLAG	Indicates whether the billable charge is recurring.
FREQUENCY	Displays the frequency of the recurring bill.
CHARGE TYPE	Indicates the charge type.

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Column Name	Column Description
	Note: This column appears only if usage data files are uploaded for the insurance module.
START DATE	Displays the date from when the price item was used.
	Note: If the start date is not available, the default usage start date appears in this column.
END DATE	Displays the date till when the price item was used.
	Note: If the end date is not available, the default usage end date appears in this column.
DESCRIPTION	Displays the description of the usage record. It is shown on the billable charge.
PRICE ITEM	Displays the price item code.
VARIANCE	Indicates the variance that must be used along with the price item for determining the price item pricing.
	Note: This column appears when the **Multi Price Parameter** option type of the **Multi Parameter Based Pricing (C1_PPARM_FLG)** feature configuration is set to **False**.
PARAM TYPE1, PARAM TYPE2, ..., PARAM TYPE15	Indicates the price item parameter that must be used along with the price item for determining the price item pricing.
	Note: These columns appear when the **Multi Price Parameter** option type of the **Multi Parameter Based Pricing (C1_PPARM_FLG)** feature configuration is set to **True**.
PARAM VALUE1, PARAM VALUE2, ..., PARAM VALUE15	Displays the value of the price item parameter.
	Note: These columns appear when the **Multi Price Parameter** option type of the **Multi Parameter Based Pricing (C1_PPARM_FLG)** feature configuration is set to **True**.
SQI1, SQI2, ..., SQI10	Indicates the service quantity identifier that must be used for calculating the price item charges.
SQIVALUE1, SQIVALUE2, ..., SQIVALUE10	Displays the number of units of the service quantity.
BILL LINE DESCRIPTION1, BILL LINE DESCRIPTION2, ..., BILL LINE DESCRIPTION10	Displays the description of the line item (charge).
AMOUNT1, AMOUNT2, ..., AMOUNT10	Displays the charge amount.
CURRENCY1, CURRENCY2, ..., CURRENCY10	Displays the currency in which the amount is charged.

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Column Name	Column Description
MEMO ONLY1, MEMO ONLY2, ..., MEMO ONLY10	Indicates whether the charge should be included in the bill amount or not.
SUMMARY1, SUMMARY2, ..., SUMMARY10	Indicates whether the charge should be included in the summary line or not.
SHOW ON BILL1, SHOW ON BILL2, ..., SHOW ON BILL10	Indicates whether the charge should appear on the person's printed bill or not.
GL DISTRIBUTION CODE 1, GL DISTRIBUTION CODE 2, ..., GL DISTRIBUTION CODE 10	Displays the distribution code which indicates the GL account associated with the charge.
CHARTYPE1, CHARTYPE2, ..., CHARTYPE10	Indicates the characteristic that must be defined for the billable charge.
CHARVAL1, CHARVAL2, ..., CHARVAL10	Displays the value of the characteristic type.
REASON	Indicates the reason why the usage record was cancelled.
COMMENTS	Displays additional information entered while cancelling a usage record.

Note:

If you have defined business labels for usage data fields, the columns will appear with the business labels defined for the respective column.

Only those columns that contain data in the CSV file appear in the **Usage Data** screen. For example, if information about characteristics is provided in the CHARTYPE4 and CHARVAL4 columns of the CSV file, then only the CHARTYPE4 and CHARVAL4 columns appear in the **Usage Data** screen. Similarly, if information about the line item (charge) is provided in the BILL LINE DESCRIPTION6, AMOUNT6, CURRENCY6, MEMO ONLY6, SUMMARY6, SHOW ON BILL6, and GL DISTRIBUTION CODE 6 columns of the CSV file, then only the BILL LINE DESCRIPTION6, AMOUNT6, CURRENCY6, MEMO ONLY6, SUMMARY6, SHOW ON BILL6, AND GL DISTRIBUTION CODE 6 columns appear in the **Usage Data** screen.

Note:

Pagination is used to display limited number of records in the **Search Results** section. You can change the number of records displayed per page, if required. You can use the navigation buttons, such as **First** (<<), **Previous** (<), **Next** (>), and **Last** (>>) to navigate between pages. You can also select the page to which you want to navigate from the **Go To** list.

3. View the cancelled records of the usage data file in the **Usage Data** screen.
4. If required, you can change the number of records displayed per page.

Note: By default, the number of records that appear in each page depends on the minimum value defined in the **PAGE_NUMBER** lookup field. For example, if the **PAGE_NUMBER** lookup field has four values - 10, 20, 30, and 40, then the number of records displayed in each page, by default, would be 10.

5. If required, you can click the **First** (<<), **Previous** (<), **Next** (>), and **Last** (>>) buttons to *n*avigate between pages.
6. If required, you can filter the cancelled records in the **Usage Data** screen.

Related Topics

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For more information on...	See...
How to search for a usage data file	Searching for a Usage Data File on page 4355
How to filter the usage records	Filtering Usage Records on page 4402

Viewing Rejected Records of a Usage Data File

Procedure

To view rejected records of a usage data file:

1. Search for the usage data file in the **Usage Data Processing** screen.
2. In the **Search Results** section, click the link in the **Rejected** column corresponding to the usage data file whose *r*ejected records you want to view.

   The **Usage Data** screen appears. It contains the following two sections:

   - **Search Criteria** - This section allows you to filter the rejected records based on the various search criteria. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
File Name	Displays the name of the usage data file.	Not applicable
File Type	Indicates the type of the usage data file.	Not applicable
Default Usage Start Date	Displays the usage start date entered while uploading the usage data file.	Not applicable
Default Usage End Date	Displays the usage end date entered while uploading the usage data file.	Not applicable
Status	Indicates that all rejected records are displayed in the **Usage Data** screen.	Not applicable
Division	Used to filter the usage data records based on their division.	No
Account Identifier Type	Used to filter the usage data records based on the type of account identifier.	Yes (Conditional) **Note:** If you enter the account identifier as a search criteria, you have to enter the account identifier type.
Account Identifier	Used to filter the usage data records based on the account identifier value.	Yes (Conditional) **Note:** If you enter the account identifier type as a search criteria, you have to enter the account identifier.

   - **Search Results** - By default, all rejected records of the usage data file are listed in the **Search Results** section. You can filter the search results based on the specified criteria. the **Search Results** section contains the following columns:

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Column Name	Column Description
ACCOUNT ID TYPE	Indicates the account identifier type.
ACCOUNT IDENTIFIER	Indicates the account to which the usage record belongs.
ACCOUNT INFORMATION	Displays information about the account.
DIVISION	Indicates the division to which the usage record belongs.
CONTRACT	Displays the contract ID. **Note:** This column appears only if usage data files are uploaded for the insurance module.
BILL PERIOD	Displays the billing period for which the usage data is applicable.
RECURRING FLAG	Indicates whether the billable charge is recurring.
FREQUENCY	Displays the frequency of the recurring bill.
CHARGE TYPE	Indicates the charge type. **Note:** This column appears only if usage data files are uploaded for the insurance module.
START DATE	Displays the date from when the price item was used. **Note:** If the start date is not available, the default usage start date appears in this column.
END DATE	Displays the date till when the price item was used. **Note:** If the end date is not available, the default usage end date appears in this column.
DESCRIPTION	Displays the description of the usage record. It is shown on the billable charge.
PRICE ITEM	Displays the price item code.
VARIANCE	Indicates the variance that must be used along with the price item for determining the price item pricing. **Note:** This column appears when the **Multi Price Parameter** option type of the **Multi Parameter Based Pricing (C1_PPARM_FLG)** feature configuration is set to **False**.
PARAM TYPE 1, PARAM TYPE 2, ..., PARAM TYPE 15	Indicates the price item parameter that must be used along with the price item for determining the price item pricing. **Note:** These columns appear when the **Multi Price Parameter** option type of the **Multi Parameter Based Pricing (C1_PPARM_FLG)** feature configuration is set to **True**.
PARAM VALUE 1, PARAM VALUE 2, ..., PARAM VALUE 15	Displays the value of the price item parameter.

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Column Name	Column Description
	Note: These columns appear when the **Multi Price Parameter** option type of the **Multi Parameter Based Pricing (C1_PPARM_FLG)** feature configuration is set to **True**.
SQI1, SQI2, ..., SQI10	Indicates the service quantity identifier that must be used for calculating the price item charges.
SQIVALUE1, SQIVALUE2, ..., SQIVALUE10	Displays the number of units of the service quantity.
BILL LINE DESCRIPTION1, BILL LINE DESCRIPTION2, ..., BILL LINE DESCRIPTION10	Displays the description of the line item (charge).
AMOUNT1, AMOUNT2, ..., AMOUNT10	Displays the charge amount.
CURRENCY 1, CURRENCY 2, ..., CURRENCY 10	Displays the currency in which the amount is charged.
MEMO ONLY 1, MEMO ONLY 2, ..., MEMO ONLY 10	Indicates whether the charge should be included in the bill amount or not.
SUMMARY 1, SUMMARY 2, ..., SUMMARY 10	Indicates whether the charge should be included in the summary line or not.
SHOW ON BILL 1, SHOW ON BILL 2, ..., SHOW ON BILL 10	Indicates whether the charge should appear on the person's printed bill or not.
GL DISTRIBUTION CODE 1, GL DISTRIBUTION CODE 2, ..., GL DISTRIBUTION CODE 10	Displays the distribution code which indicates the GL account associated with the charge.
CHARTYPE 1, CHARTYPE 2, ..., CHARTYPE 10	Indicates the characteristic that must be defined for the billable charge.
CHARVAL 1, CHARVAL 2, ..., CHARVAL 10	Displays the value of the characteristic type.
REASON	Indicates the reason why the usage record was rejected by the approver.
COMMENTS	Displays additional information entered while rejecting a usage record.

Note:

If you have defined business labels for usage data fields, the columns will appear with the business labels defined for the respective column.

Only those columns that contain data in the CSV file appear in the **Usage Data** screen. For example, if information about characteristics is provided in the CHARTYPE4 and CHARVAL4 columns of the CSV file, then only the CHARTYPE4 and CHARVAL4 columns appear in the **Usage Data** screen. Similarly, if information about the line item (charge) is provided in the BILL LINE DESCRIPTION6, AMOUNT6, CURRENCY6, MEMO ONLY6, SUMMARY6, SHOW ON BILL6, and GL DISTRIBUTION CODE 6 columns of the CSV file, then only the BILL LINE DESCRIPTION6, AMOUNT6, CURRENCY6, MEMO ONLY6, SUMMARY6, SHOW ON BILL6, AND GL DISTRIBUTION CODE 6 columns appear in the **Usage Data** screen.

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> **Note:**
>
> Pagination is used to display limited number of records in the **Search Results** section. You can change the number of records displayed per page, if required. You can use the navigation buttons, such as **First** (<<), **Previous** (<), **Next** (>), and **Last** (>>) to navigate between pages. You can also select the page to which you want to navigate from the **Go To** list.

3. View the rejected records of the usage data file in the **Usage Data** screen.
4. If required, you can change the number of records displayed per page.

> **Note:** By default, the number of records that appear in each page depends on the minimum value defined in the **PAGE_NUMBER** lookup field. For example, if the **PAGE_NUMBER** lookup field has four values - 10, 20, 30, and 40, then the number of records displayed in each page, by default, would be 10.

5. If required, you can click the **First** (<<), **Previous** (<), **Next** (>), and **Last** (>>) buttons to *n*avigate between pages.
6. If required, you can filter the rejected records in the **Usage Data** screen.

Related Topics

For more information on...	See...
How to search for a usage data file	Searching for a Usage Data File on page 4355
How to filter the usage records	Filtering Usage Records on page 4402

Viewing Billed Records of a Usage Data File

Procedure

To view billed records of a usage data file:

1. Search for the usage data file in the **Usage Data Processing** screen.
2. In the **Search Results** section, click the link in the **Billed** column corresponding to the usage data file whose *b*illed records you want to view.

   The **Usage Data** screen appears. It contains the following two sections:

   - **Search Criteria** - This section allows you to filter the billed records based on the various search criteria. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
File Name	Displays the name of the usage data file.	Not applicable
File Type	Indicates the type of the usage data file.	Not applicable
Default Usage Start Date	Displays the usage start date entered while uploading the usage data file.	Not applicable
Default Usage End Date	Displays the usage end date entered while uploading the usage data file.	Not applicable
Usage Record Status	Indicates that all billed records are displayed in the **Usage Data** screen.	Not applicable
Division	Used to filter the usage data records based on their division.	No

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Field Name	Field Description	Mandatory (Yes or No)
Account Identifier Type	Used to filter the usage data records based on the type of account identifier.	Yes (Conditional) **Note:** If you enter the account identifier as a search criteria, you have to enter the account identifier type.
Account Identifier	Used to filter the usage data records based on the account identifier value.	Yes (Conditional) **Note:** If you enter the account identifier type as a search criteria, you have to enter the account identifier.

- **Search Results** - By default, all billed records of the usage data file are listed in the **Search Results** section. You can filter the search results based on the specified criteria. the **Search Results** section contains the following columns:

Column Name	Column Description
BILLABLE CHARGE ID	Indicates the billable charge which is generated for the usage record.
ACCOUNT ID TYPE	Indicates the account identifier type.
ACCOUNT IDENTIFIER	Indicates the account to which the usage record belongs.
ACCOUNT INFORMATION	Displays information about the account.
DIVISION	Indicates the division to which the usage record belongs.
CONTRACT	Displays the contract ID. **Note:** This column appears only if usage data files are uploaded for the insurance module.
BILL PERIOD	Displays the billing period for which the usage data is applicable.
RECURRING FLAG	Indicates whether the billable charge is recurring.
FREQUENCY	Displays the frequency of the recurring bill.
CHARGE TYPE	Indicates the charge type. **Note:** This column appears only if usage data files are uploaded for the insurance module.
START DATE	Displays the date from when the price item was used. **Note:** If the start date is not available, the default usage start date appears in this column.
END DATE	Displays the date till when the price item was used. **Note:** If the end date is not available, the default usage end date appears in this column.

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Column Name	Column Description
DESCRIPTION	Displays the description of the usage record. It is shown on the billable charge.
PRICE ITEM	Displays the price item code.
VARIANCE	Indicates the variance that must be used along with the price item for determining the price item pricing. **Note:** This column appears when the **Multi Price Parameter** option type of the **Multi Parameter Based Pricing (C1_PPARM_FLG)** feature configuration is set to **False**.
PARAM TYPE1, PARAM TYPE2, ..., PARAM TYPE15	Indicates the price item parameter that must be used along with the price item for determining the price item pricing. **Note:** These columns appear when the **Multi Price Parameter** option type of the **Multi Parameter Based Pricing (C1_PPARM_FLG)** feature configuration is set to **True**.
PARAM VALUE1, PARAM VALUE2, ..., PARAM VALUE15	Displays the value of the price item parameter. **Note:** These columns appear when the **Multi Price Parameter** option type of the **Multi Parameter Based Pricing (C1_PPARM_FLG)** feature configuration is set to **True**.
SQI1, SQI2, ..., SQI10	Indicates the service quantity identifier that must be used for calculating the price item charges.
SQIVALUE1, SQIVALUE2, ..., SQIVALUE10	Displays the number of units of the service quantity.
BILL LINE DESCRIPTION1, BILL LINE DESCRIPTION2, ..., BILL LINE DESCRIPTION10	Displays the description of the line item (charge).
AMOUNT1, AMOUNT2, ..., AMOUNT10	Displays the charge amount.
CURRENCY1, CURRENCY2, ..., CURRENCY10	Displays the currency in which the amount is charged.
MEMO ONLY1, MEMO ONLY2, ..., MEMO ONLY10	Indicates whether the charge should be included in the bill amount or not.
SUMMARY1, SUMMARY2, ..., SUMMARY10	Indicates whether the charge should be included in the summary line or not.
SHOW ON BILL1, SHOW ON BILL2, ..., SHOW ON BILL10	Indicates whether the charge should appear on the person's printed bill or not.
GL DISTRIBUTION CODE 1, GL DISTRIBUTION CODE 2, ..., GL DISTRIBUTION CODE 10	Displays the distribution code which indicates the GL account associated with the charge.

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Column Name	Column Description
CHARTYPE1, CHARTYPE2, ..., CHARTYPE10	Indicates the characteristic that must be defined for the billable charge.
CHARVAL1, CHARVAL2, ..., CHARVAL10	Displays the value of the characteristic type.
REASON	Displays the reason associated with the usage data.
COMMENTS	Displays comments or additional details related to the usage data.

Note:

If you have defined business labels for usage data fields, the columns will appear with the business labels defined for the respective column.

Only those columns that contain data in the CSV file appear in the **Usage Data** screen. For example, if information about characteristics is provided in the CHARTYPE4 and CHARVAL4 columns of the CSV file, then only the CHARTYPE4 and CHARVAL4 columns appear in the **Usage Data** screen. Similarly, if information about the line item (charge) is provided in the BILL LINE DESCRIPTION6, AMOUNT6, CURRENCY6, MEMO ONLY6, SUMMARY6, SHOW ON BILL6, and GL DISTRIBUTION CODE 6 columns of the CSV file, then only the BILL LINE DESCRIPTION6, AMOUNT6, CURRENCY6, MEMO ONLY6, SUMMARY6, SHOW ON BILL6, AND GL DISTRIBUTION CODE 6 columns appear in the **Usage Data** screen.

Note:

Pagination is used to display limited number of records in the **Search Results** section. You can change the number of records displayed per page, if required. You can use the navigation buttons, such as **First** (<<), **Previous** (<), **Next** (>), and **Last** (>>) to navigate between pages. You can also select the page to which you want to navigate from the **Go To** list.

3. View the billed records of the usage data file in the **Usage Data** screen.
4. If required, you can change the number of records displayed per page.

Note: By default, the number of records that appear in each page depends on the minimum value defined in the **PAGE_NUMBER** lookup field. For example, if the **PAGE_NUMBER** lookup field has four values - 10, 20, 30, and 40, then the number of records displayed in each page, by default, would be 10.

5. If required, you can click the **First** (<<), **Previous** (<), **Next** (>), and **Last** (>>) buttons to *n*avigate between pages.
6. If required, you can filter the billed records in the **Usage Data** screen.

Related Topics

For more information on...	See...
How to search for a usage data file	Searching for a Usage Data File on page 4355
How to filter the usage records	Filtering Usage Records on page 4402

Viewing Unbilled Records of a Usage Data File

Procedure

To view unbilled records of a usage data file:

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1. Search for the usage data file in the **Usage Data Processing** screen.
2. In the **Search Results** section, click the link in the **Unbilled** column corresponding to the usage data file whose unbilled records you want to view.

   The **Usage Data** screen appears. It contains the following two sections:

   - **Search Criteria** - This section allows you to filter the unbilled records based on the various search criteria. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
File Name	Displays the name of the usage data file.	Not applicable
File Type	Indicates the type of the usage data file.	Not applicable
Default Usage Start Date	Displays the usage start date entered while uploading the usage data file.	Not applicable
Default Usage End Date	Displays the usage end date entered while uploading the usage data file.	Not applicable
Usage Record Status	Indicates that all unbilled records are displayed in the **Usage Data** screen.	Not applicable
Division	Used to filter the usage data records based on their division.	No
Account Identifier Type	Used to filter the usage data records based on the type of account identifier.	Yes (Conditional) **Note:** If you enter the account identifier as a search criteria, you have to enter the account identifier type.
Account Identifier	Used to filter the usage data records based on the account identifier value.	Yes (Conditional) **Note:** If you enter the account identifier type as a search criteria, you have to enter the account identifier.

   - **Search Results** - By default, all unbilled records of the usage data file are listed in the **Search Results** section. You can filter the search results based on the specified criteria. the **Search Results** section contains the following columns:

Column Name	Column Description
BILLABLE CHARGE ID	Indicates the billable charge which is generated for the usage record.
ACCOUNT ID TYPE	Indicates the account identifier type.
ACCOUNT IDENTIFIER	Indicates the account to which the usage record belongs.
ACCOUNT INFORMATION	Displays information about the account.
DIVISION	Indicates the division to which the usage record belongs.
CONTRACT	Displays the contract ID. **Note:** This column appears only if usage data files are uploaded for the insurance module.

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Column Name	Column Description
BILL PERIOD	Displays the billing period for which the usage data is applicable.
RECURRING FLAG	Indicates whether the billable charge is recurring.
FREQUENCY	Displays the frequency of the recurring bill.
CHARGE TYPE	Indicates the charge type. **Note:** This column appears only if usage data files are uploaded for the insurance module.
START DATE	Displays the date from when the price item was used. **Note:** If the start date is not available, the default usage start date appears in this column.
END DATE	Displays the date till when the price item was used. **Note:** If the end date is not available, the default usage end date appears in this column.
DESCRIPTION	Displays the description of the usage record. It is shown on the billable charge.
PRICE ITEM	Displays the price item code.
VARIANCE	Indicates the variance that must be used along with the price item for determining the price item pricing. **Note:** This column appears when the **Multi Price Parameter** option type of the **Multi Parameter Based Pricing (C1_PPARM_FLG)** feature configuration is set to **False**.
PARAM TYPE1, PARAM TYPE2, ..., PARAM TYPE15	Indicates the price item parameter that must be used along with the price item for determining the price item pricing. **Note:** These columns appear when the **Multi Price Parameter** option type of the **Multi Parameter Based Pricing (C1_PPARM_FLG)** feature configuration is set to **True**.
PARAM VALUE1, PARAM VALUE2, ..., PARAM VALUE15	Displays the value of the price item parameter. **Note:** These columns appear when the **Multi Price Parameter** option type of the **Multi Parameter Based Pricing (C1_PPARM_FLG)** feature configuration is set to **True**.
SQI1, SQI2, ..., SQI10	Indicates the service quantity identifier that must be used for calculating the price item charges.
SQIVALUE1, SQIVALUE2, ..., SQIVALUE10	Displays the number of units of the service quantity.
BILL LINE DESCRIPTION1, BILL LINE DESCRIPTION2, ..., BILL LINE DESCRIPTION10	Displays the description of the line item (charge).

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Column Name	Column Description
AMOUNT1, AMOUNT2, ..., AMOUNT10	Displays the charge amount.
CURRENCY1, CURRENCY2, ..., CURRENCY10	Displays the currency in which the amount is charged.
MEMO ONLY1, MEMO ONLY2, ..., MEMO ONLY10	Indicates whether the charge should be included in the bill amount or not.
SUMMARY1, SUMMARY2, ..., SUMMARY10	Indicates whether the charge should be included in the summary line or not.
SHOW ON BILL1, SHOW ON BILL2, ..., SHOW ON BILL10	Indicates whether the charge should appear on the person's printed bill or not.
GL DISTRIBUTION CODE 1, GL DISTRIBUTION CODE 2, ..., GL DISTRIBUTION CODE 10	Displays the distribution code which indicates the GL account associated with the charge.
CHARTYPE1, CHARTYPE2, ..., CHARTYPE10	Indicates the characteristic that must be defined for the billable charge.
CHARVAL1, CHARVAL2, ..., CHARVAL10	Displays the value of the characteristic type.
REASON	Displays the reason associated with the usage data.
COMMENTS	Displays comments or additional details related to the usage data.

Note:

If you have defined business labels for usage data fields, the columns will appear with the business labels defined for the respective column.

Only those columns that contain data in the CSV file appear in the **Usage Data** screen. For example, if information about characteristics is provided in the CHARTYPE4 and CHARVAL4 columns of the CSV file, then only the CHARTYPE4 and CHARVAL4 columns appear in the **Usage Data** screen. Similarly, if information about the line item (charge) is provided in the BILL LINE DESCRIPTION6, AMOUNT6, CURRENCY6, MEMO ONLY6, SUMMARY6, SHOW ON BILL6, and GL DISTRIBUTION CODE 6 columns of the CSV file, then only the BILL LINE DESCRIPTION6, AMOUNT6, CURRENCY6, MEMO ONLY6, SUMMARY6, SHOW ON BILL6, AND GL DISTRIBUTION CODE 6 columns appear in the **Usage Data** screen.

Note:

Pagination is used to display limited number of records in the **Search Results** section. You can change the number of records displayed per page, if required. You can use the navigation buttons, such as **First** (<<), **Previous** (<), **Next** (>), and **Last** (>>) to navigate between pages. You can also select the page to which you want to navigate from the **Go To** list.

3. View the unbilled records of the usage data file in the **Usage Data** screen.
4. If required, you can change the number of records displayed per page.

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> **Note:** By default, the number of records that appear in each page depends on the minimum value defined in the **PAGE_NUMBER** lookup field. For example, if the **PAGE_NUMBER** lookup field has four values - 10, 20, 30, and 40, then the number of records displayed in each page, by default, would be 10.

5. If required, you can click the **First** (<<), **Previous** (<), **Next** (>), and **Last** (>>) buttons to *n*avigate between pages.
6. If required, you can filter the unbilled records in the **Usage Data** screen.

Related Topics

For more information on...	See...
How to search for a usage data file	Searching for a Usage Data File on page 4355
How to filter the usage records	Filtering Usage Records on page 4402

Submitting a Valid Record

Procedure

To submit a valid record:

1. Search for the usage data file in the **Usage Data Processing** screen.
2. In the **Search Results** section, click the **Submit** ( ) icon corresponding to the usage data file whose valid *r*ecords you want to submit.

   The system behaves in the following manner when:

   - **Billing Method - Adhoc Billing, Approval Workflow - Off, and Bill After Date - Current or Future Date:** A billable charge is created for each valid usage record. The **Adhoc Bill** flag is set to **Y** and the **Bill After Date** is stamped on the billable charge. If the total number of valid records in a usage data file exceeds the transaction limit, a batch job is created using the **Billable Charge Creation (C1-ODBCH)** batch. A message appears indicating the batch job ID. This batch job creates a billable charge for each valid usage record. The status of the usage record is changed to **Processed**.
   - **Billing Method - Adhoc Billing, Approval Workflow - On, and Bill After Date - Current or Future Date:** A To Do entry is created for the approver to approve the valid records. The status of the usage record is changed to **Submitted**.
   - **Billing Method - Regular Billing, Approval Workflow - Off, and Bill After Date - Specified:** A billable charge is created for each valid usage record. The **Adhoc Bill** flag is set to **N** and the **Bill After Date** is stamped on the billable charge. If the total number of valid records in a usage data file exceeds the transaction limit, a batch job is created using the **Billable Charge Creation (C1-ODBCH)** batch. A message appears indicating the batch job ID. This batch job creates a billable charge for each valid usage record. The status of the usage record is changed to **Processed**. The bills will be generated for the account in the bill cycle in which the bill after date falls.
   - **Billing Method - Regular Billing, Approval Workflow - Off, and Bill After Date - Not Specified:** A billable charge is created for each valid usage record. The **Adhoc Bill** flag is set to **N** in the billable charge. If the total number of valid records in a usage data file exceeds the transaction limit, a batch job is created using the **Billable Charge Creation (C1-ODBCH)** batch. A message appears indicating the batch job ID. This batch job creates a billable charge for each valid usage record. The status of the usage record is changed to **Processed**. The bills will be generated for the account based on the bill cycle defined for the account.
   - **Billing Method - Regular Billing and Approval Workflow - On:** A To Do entry is created for the approver to approve the valid records. The status of the usage record is changed to **Submitted**.

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Note:

You can change the transaction limit, whenever required, using the **On Demand Billing (C1-ODBFC)** feature configuration. For more information on the **Billable Charge Creation (C1-ODBCH)** batch, see *Oracle Revenue Management and Billing Batch Execution Guide*.

If you want to create billable charges for valid usage records where start date is a future date, then ensure that the **Use Calendar Billing** option is set to **Allow Advanced Billing** in the respective contract type.

If a batch job is created automatically, the number of valid records for which billable charges are created in each work unit depends on the value defined for the **Billable Charge Chunk Size** option type in the **On Demand Billing (C1-ODBFC)** feature configuration.

In case an account belongs to an invoicing group, the billable charge is created for the member account and the bill is generated for the master account.

On successful completion of the **Billable Charge Creation (C1-ODBCH)** batch, a To Do entry is created using the **C1-ODBCH** To Do type. You can view this To Do entry when you are assigned a To Do role which is mapped to the **C1-ODBCH** To Do type. This To Do indicates whether the batch was successfully executed or not. If the batch was successfully executed, it indicates the following:

- Number of records for which billable charges were created
- Number of records for which billable charges could not be created successfully

3. If a batch job is created automatically, click **OK** in the message box.

Related Topics

For more information on...	See...
How to search for a usage data file	Searching for a Usage Data File on page 4355
How to set the **On Demand Billing (C1-ODBFC)** feature configuration	Setting the C1-ODBFC Feature Configuration

Approving a Valid Record

You can view the number of records which are pending for approval in the **Submitted** column corresponding to the usage data file in the **Usage Data Processing** screen. The approver can review, and accordingly approve or reject the usage record based on the observations.

Note: The system will not allow you to approve or reject a usage record submitted by you.

Procedure

To approve a valid record:

1. Do either of the following:

If you want to...	Then...
Approve the usage record from the Usage Data Processing screen	**a.** Search for the usage data file in the **Usage Data Processing** screen. **b.** In the **Search Results** section, click the **Approve** (✓) icon corresponding to the usage data file whose records you want to review.
Approve the usage record from the To Do List screen	**a.** From the **Main Menu**, select **To Do** and then click **To Do List**. The **To Do Type for User Search** window appears.

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If you want to...	Then...
	b. Select the type of To Do entries you want to view. The **To Do List** screen appears. **c.** Select **Open** from the **Filter by** list to view all unassigned To Dos. **d.** Click the **Submitted Message** link corresponding to the To Do entry whose records you want to review.

The **Usage Data** screen appears.

2. Review the usage records which you want approve or reject.
3. Do either of the following:

If you want to...	Then...
Approve one or more usage records	**a.** If the usage record is accurate, then select the check box corresponding to the usage record. **b.** Click **Approve**. The system behaves in the following manner when: • **Billing Method - Adhoc Billing and Bill After Date - Current or Future Date:** A billable charge is created for each valid record which is approved. The **Adhoc Bill** flag is set to **Y** and the **Bill After Date** is stamped on the billable charge. The status of the usage record is changed to **Processed**. • **Billing Method - Regular Billing and Bill After Date - Specified:** A billable charge is created for each valid record which is approved. The **Adhoc Bill** flag is set to **N** and the **Bill After Date** is stamped on the billable charge. The status of the usage record is changed to **Processed**. The bills will be generated for the account in the bill cycle in which the bill after date falls. • **Billing Method - Regular Billing and Bill After Date - Not Specified:** A billable charge is created for each valid record which is approved. The **Adhoc Bill** flag is set to **N** in the billable charge. The status of the usage record is changed to **Processed**. The bills will be generated for the account based on the bill cycle defined for the account.
Approve all usage records	**a.** Click **Approve All**. The system behaves in the following manner when: • **Billing Method - Adhoc Billing and Bill After Date - Current or Future Date:** A billable charge is created for each valid record which is approved. The **Adhoc Bill** flag is set to **Y** and the **Bill After Date** is stamped on the billable charge. If the total number of records that you want to approve exceeds the transaction limit, a batch job is created using the **Billable Charge Creation (C1-ODBCH)** batch. A message appears indicating the batch job ID. This batch job creates a billable charge for each valid usage record. The status of the usage record is changed to **Processed**.

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If you want to...	Then...
	• **Billing Method - Regular Billing and Bill After Date - Specified:** A billable charge is created for each valid record which is approved. The **Adhoc Bill** flag is set to **N** and the **Bill After Date** is stamped on the billable charge. If the total number of records that you want to approve exceeds the transaction limit, a batch job is created using the **Billable Charge Creation (C1-ODBCH)** batch. A message appears indicating the batch job ID. This batch job creates a billable charge for each valid usage record. The status of the usage record is changed to **Processed**. The bills will be generated for the account in the bill cycle in which the bill after date falls. • **Billing Method - Regular Billing and Bill After Date - Not Specified:** A billable charge is created for each valid record which is approved. The **Adhoc Bill** flag is set to **N** in the billable charge. If the total number of records that you want to approve exceeds the transaction limit, a batch job is created using the **Billable Charge Creation (C1-ODBCH)** batch. A message appears indicating the batch job ID. This batch job creates a billable charge for each valid usage record. The status of the usage record is changed to **Processed**. The bills will be generated for the account based on the bill cycle defined for the account.

Note:

You can change the transaction limit, whenever required, using the **On Demand Billing (C1-ODBFC)** feature configuration. For more information on the **Billable Charge Creation (C1-ODBCH)** batch, see *Oracle Revenue Management and Billing Batch Execution Guide*.

If you want to create billable charges for approved records where start date is a future date, then ensure that the **Use Calendar Billing** option is set to **Allow Advanced Billing** in the respective contract type.

If a batch job is created automatically, the number of approved records for which billable charges are created in each work unit depends on the value defined for the **Billable Charge Chunk Size** option type in the **On Demand Billing (C1-ODBFC)** feature configuration.

In case an account belongs to an invoicing group, the billable charge is created for the member account and the bill is generated for the master account.

On successful completion of the **Billable Charge Creation (C1-ODBCH)** batch, a To Do entry is created using the **C1-ODBCH** To Do type. You can view this To Do entry when you are assigned a To Do role which is mapped to the **C1-ODBCH** To Do type. This To Do indicates whether the batch was successfully executed or not. If the batch was successfully executed, it indicates the following:

- Number of records for which billable charges were created
- Number of records for which billable charges could not be created successfully

4. If a batch job is created automatically, click **OK** in the message box.

Related Topics

For more information on...	See...
How to search for a usage data file	Searching for a Usage Data File on page 4355

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For more information on...	See...
How to set the **On Demand Billing (C1-ODBFC)** feature configuration	Setting the C1-ODBFC Feature Configuration

Rejecting a Valid Record

You can view the number of records which are pending for approval in the **Submitted** column corresponding to the usage data file in the **Usage Data Processing** screen. The approver can review, and accordingly approve or reject the usage record based on the observations.

Note: The system will not allow you to approve or reject a usage record submitted by you.

Procedure

To reject a valid record:

1. Do either of the following:

If you want to...	Then...
Reject the usage record from the Usage Data Processing screen	**a.** Search for the usage data file in the **Usage Data Processing** screen. **b.** In the **Search Results** section, click the **Approve** (✓) icon corresponding to the usage data file whose records you want to review.
Reject the usage record from the To Do List screen	**a.** From the **Main Menu**, select **To Do** and then click **To Do List**. The **To Do Type for User Search** window appears. **b.** Select the type of To Do entries you want to view. The **To Do List** screen appears. **c.** Select **Open** from the **Filter by** list to view all unassigned To Dos. **d.** Click the **Submitted Message** link corresponding to the To Do entry whose records you want to review.

   The **Usage Data** screen appears.
2. Review the usage records which you want approve or reject.
3. Do either of the following:

If you want to...	Then...
Reject one or more usage records	**a.** If the usage record is not appropriate, then select the check box corresponding to the usage record. **b.** Click **Reject**.
Reject all usage records	**a.** Click **Reject All**.

   The **Rejection Reason** screen appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Reason	Used to indicate the reason why you want to reject the usage record.	Yes

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Field Name	Field Description	Mandatory (Yes or No)
Comments	Used to specify additional information while rejecting the usage record.	Yes

4. Select the reason for rejecting the usage record and enter the comments in the respective field.

> **Note:** The **ODB_REJ_RSN_FLG** lookup field values appear in the **Reason** list.

5. Click **OK**.
   The status of the usage record is changed to **Rejected**. A To Do entry is created for the submitter to include correct or missing data.

Related Topics

For more information on...	See...
How to search for a usage data file	Searching for a Usage Data File on page 4355

Cancelling a Usage Data File

There might be situations when incorrect usage data file is uploaded in the system. In such case, the system provides you with an ability to cancel the file. Once the usage data file is cancelled, the status of the file and all usage records in the file is changed to **Cancelled**. However, note that you can cancel a usage data file when there are no records (in other words, zero records) in the **Processed** and **Submitted** statuses.

Procedure

To cancel a usage data file:

1. Do either of the following:

If you want to...	Then...
Cancel the usage data file from the Usage Data Processing screen	**a.** Search for the usage data file in the **Usage Data Processing** screen. **b.** In the **Search Results** section, click the **Cancel** (⊘) icon corresponding to the usage data file that you want to cancel.
Cancel the usage data file from the On Demand Billing screen	**a.** From the **Main Menu**, select **Billing Management** and then click **On Demand Billing**. The **On Demand Billing** screen appears. **b.** Search for the file group whose usage data file you want to cancel. The search results appears. **c.** Click the **Broadcast** (📡) icon corresponding to the required file group. The **Group Files** zone appears. The **Group Files** zone lists the usage data files that are uploaded using the file group. **d.** Click the **Cancel** (⊘) icon corresponding to the usage data file that you want to cancel.

   A message appears confirming whether you want to cancel the usage data file.
2. Click **OK**.

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The **Cancel Reason** screen appears. It contains the following fields:

Field Name	Field Description	Mandatory (Yes or No)
Reason	Used to indicate the reason why you want to cancel the usage data file.	Yes
Comments	Used to specify additional information while cancelling the usage data file.	Yes

3. Select the reason for cancelling the usage data file and enter the comments in the respective field.

Note: The **ODB_CAN_RSN_FLG** lookup field values appear in the **Reason** list.

4. Click **OK**.
   The status of the usage data file is changed to **Cancelled**.

Related Topics

For more information on...	See...
How to search for a file group	Searching for a File Group on page 4341
How to search for a usage data file	Searching for a Usage Data File on page 4355
Group Files zone	Group Files on page 4339

Revalidating a Usage Data File

There might be situations when you want to execute the validation process once again on the usage data file. For example, initially when the usage data file was uploaded, accounts didn't have an active contract and therefore the status of the usage records was set to **Invalid**. Later, a contract was created and activated for each account (whose usage records are available in the usage data file). In such case, you need to execute the validation process once again on the usage data file. However, note that when you revalidate a usage data file, only the records in the **Valid** and **Invalid** status are revalidated.

Procedure

To revalidate a usage data file:

1. Search for the usage data file in the **Usage Data Processing** screen.
2. Click the **Revalidate** ( ) icon corresponding to the usage data file on which you want to execute the *v*alidation process once again.

   The valid and invalid records are revalidated, and accordingly the status of records is changed. A message appears indicating that the validation process has completed successfully.

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Note:

If the usage data file size exceeds the file size limit set in the **On Demand Billing (C1-ODBFC)** feature configuration, a batch job is created using the **Upload and Validate Usage Data File (C1-ODFU)** batch. A message appears indicating the batch job ID. This batch job revalidates the usage data file. For more information on the **Upload and Validate Usage Data File (C1-ODFU)** batch, see *Oracle Revenue Management and Billing Batch Execution Guide*.

If a batch job is created automatically, the number of usage records that are revalidated in each work unit depends on the value defined for the **Validation Chunk Size** option type in the **On Demand Billing (C1-ODBFC)** feature configuration.

On successful completion of the **Upload and Validate Usage Data File (C1-ODFU)** batch, a To Do entry is created using the **C1-ODFU** To Do type. You can view this To Do entry when you are assigned a To Do role which is mapped to the **C1-ODFU** To Do type. This To Do indicates whether the batch was successfully executed or not. If the batch was successfully executed, it indicates the following:

- Number of records which were successfully validated
- Number of records which could not pass through the validation process
- Number of records which failed to validate due to some technical reasons

3. Click **OK** in the message box.
   Once a usage record is successfully validated, the status of the usage record is changed to **Valid**. And, if a usage record could not pass through the validation process, the status of the usage record is changed to **Invalid**.

Related Topics

For more information on...	See...
How to search for a usage data file	Searching for a Usage Data File on page 4355
How to set the **On Demand Billing (C1-ODBFC)** feature configuration	Setting the C1-ODBFC Feature Configuration

Editing a Valid, Invalid, or Rejected Usage Record

If the usage record validation fails or the approver rejects the usage record due to some reason, the status of the record is changed to **Invalid** or **Rejected**, respectively. You need to then correct the existing data or add the missing data. The system allows you to edit the valid, invalid, and rejected usage records.

Procedure

To edit a valid, invalid or rejected usage record:

1. Search for the usage data file in the **Usage Data Processing** screen.
2. Depending on whether you want to edit a valid, invalid, or rejected record, click the link in the **Valid**, **Invalid**, *or* **Rejected** column corresponding to the usage data file whose records you want to edit.
   The **Usage Data** screen appears. The columns in the **Search Results** section are editable.

Note:

In case of rejected records, all columns except the **Reason** and **Comments** columns are editable.

In case of invalid record, the field with incorrect or missing data is highlighted with the red color. This helps to easily identify the reason why the validation process failed.

3. Enter the correct or missing data in the respective field.

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4. Click **Save**.
   All valid, invalid, or rejected usage records are validated once again. Once the validation process has completed successfully, the status of the records is changed accordingly.

Related Topics

For more information on...	See...
How to search for a usage data file	Searching for a Usage Data File on page 4355

Exporting Usage Data into CSV file

Oracle Revenue Management and Billing provides you the facility to export the usage data into a CSV file. However, you can download the usage data in a CSV file only if the billable charges are not yet created. In other words, you can download the usage data only when all the records of a usage data file are in the valid and/or invalid status. Once the usage data is downloaded, you can edit the usage records and reupload the usage data file.

Note: When you download the usage data file using the **Export To Excel** option, the downloaded file is saved on your system with a unique ID. Once you make the required changes in the downloaded usage data file, you need to save the modified file with the same name as it exists in Oracle Revenue Management and Billing, and then upload the file into the system to replace the existing file.

Procedure

To export usage data into CSV file:

1. Search for the usage data file in the **Usage Data Processing** screen.
2. In the **Search Results** section, click the link in the **Total** column corresponding to the usage data file whose *u*sage records you want to export.

   The **Usage Data** screen appears.
3. Click the **Export To Excel** link in the **Search** section to download details of all the valid and/or invalid records of a usage data file in a CSV file format.
   A message appears indicating that all valid and invalid records will be exported.
4. Click **OK**.
   The system automatically save the file in **Excel** format.

Related Topics

For more information on...	See...
How to search for a usage data file	Searching for a Usage Data File on page 4355

Filtering Usage Records

Procedure

To filter records of a usage data file:

1. Search for the usage data file in the **Usage Data Processing** screen.
2. Depending on whether you want to filter total, valid, invalid, submitted, processed, rejected, cancelled, billed, or unbilled usage records, click the link in the respective column corresponding to the usage data file.
   The **Usage Data** screen appears.

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3. Enter the search criteria based on which you want to filter the records.

> **Note:** ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.

4. Click **Search**.
   The search results are filtered based on the specified criteria.

Related Topics

For more information on...	See...
How to search for a usage data file	Searching for a Usage Data File on page 4355
How to view all records of a usage data file	Viewing All Records of a Usage Data File on page 4363
How to view valid records of a usage data file	Viewing Valid Records of a Usage Data File on page 4366
How to view invalid records of a usage data file	Viewing Invalid Records of a Usage Data File on page 4370
How to view submitted records of a usage data file	Viewing Submitted Records of a Usage Data File on page 4373
How to view processed records of a usage data file	Viewing Processed Records of a Usage Data File on page 4377
How to view rejected records of a usage data file	Viewing Rejected Records of a Usage Data File on page 4384
How to view cancelled records of a usage data file	Viewing Cancelled Records of a Usage Data File on page 4380
How to view billed records of a usage data file	Viewing Billed Records of a Usage Data File on page 4387
How to view unbilled records of a usage data file	Viewing Unbilled Records of a Usage Data File on page 4390

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Chapter 57

Accounts Payable Inbound and Outbound

Topics:

- Accounts Payable (Refund Adjustments) Extraction
- Updating Accounts Payable Request in ORMB

Oracle Revenue Management and Billing enables you to extract the accounts payable (i.e. refund adjustments) in a flat file. You can then share the flat file with an external system (i.e. Accounts Payable Processing System). The external system will then accordingly make the refund payments to the customers as appropriate.

Once the external system (i.e. Accounts Payable Processing System) makes a payment against the accounts payable request or rejects the accounts payable request, ideally, the ORMB application should be accordingly updated to track the accounts payable request. ORMB provides the ability to receive the response for each accounts payable request sent to an external system.

Accounts Payable (Refund Adjustments) Extraction

Oracle Revenue Management and Billing enables you to extract the accounts payable (i.e. refund adjustments) in the following formats:

- Comma-Separated Values (CSV)
- Pipe-Separated Values (PSV)
- Tilde-Delimited File (TILD)
- Extensible Markup Language (XML)
- JavaScript Object Notation (JSON)

A new batch named **C1-APEXT** is introduced in this release. You need to set the **A/P Batch Code** field to **C1-APEXT** in the **Financial Transaction** tab of the **Installation Options** screen. On creating a refund adjustment, the system will then stamp the **C1-APEXT** batch control and batch run number whenever records are added in the **CI_ADJ_APREQ** table.

The **C1-APEXT** batch enables you to extract the accounts payable (i.e. refund adjustments) in a flat file. It considers all the adjustments created using the adjustment types where the **A/P Request Type Code** field is set to **REFUND** and whose corresponding record in the **CI_ADJ_APREQ** table has the latest batch run number. It then extracts the data in a flat file in the given format.

This batch is a multi-threaded batch. The multi-threading is based on adjustment ID and chunks for multi-threading are created based on numerical distribution of adjustment ID. It contains the following parameters:

Parameter Name	Mandatory (Yes or No)	Description
DIST-THD-POOL	No	Used to specify the thread pool on which you want to execute the batch.
File Name	Yes	Used to specify the name which you want to use for the flat file. **Note:** By default, the file name is set to **DummyRecords**.
File Path	Yes	Used to specify the directory where you want to store the extracted file. If the application environment is an On Premise or Cloud Service environment, you can specify the directory name along with the following relative path: • **@SHARED_DIR** – Used when you want to store the extracted file in the shared directory on the server. For example, you can set the value to `@SHARED_DIR/output`.
File Format	Yes	Used to specify the format in which you want to extract the data. The valid values are: • **CSV** – Used when you want to extract the data in the **Comma-Separated Values** (**CSV**) format. • **PSV** - Used when you want to extract the data in the **Pipe-Separated Values** (**PSV**) format. • **TILD** - Used when you want to extract the data in the **Tilde-Delimited File** (**TILD**) format. • **XML** - Used when you want to extract the data in the **Extensible Markup Language** (**XML**) format. • **JSON** - Used when you want to extract the data in the **JavaScript Object Notation** (**JSON**) format.

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Parameter Name	Mandatory (Yes or No)	Description
Header Date Format	Yes	Used to specify the format in which the date should printed in the header of the extracted file. The header date indicates when the flat file was extracted in ORMB.
		Note: By default, the date format is set to **DD-MM-YYYY**.

Once the data is extracted in the given format at the specified location, the status of the accounts payable request in the **CI_ADJ_APREQ** table is changed from **N** (i.e. Not Ready) to **R** (i.e. Ready for Payment). You can then share the flat file with an external system (i.e. Accounts Payable Processing System). The external system will then accordingly make the refund payments to the customers as appropriate.

Updating Accounts Payable Request in ORMB

Once the external system (i.e. Accounts Payable Processing System) makes a payment against the accounts payable request or rejects the accounts payable request, ideally, the ORMB application should be accordingly updated to track the accounts payable request. Oracle Revenue Management and Billing provides the ability to receive the response for each accounts payable request sent to an external system. The system can receive the response in the following formats:

- Comma-Separated Values (CSV)
- Pipe-Separated Values (PSV)
- Tilde-Delimited File (TILD)
- Extensible Markup Language (XML)
- JavaScript Object Notation (JSON)

You can send response for multiple accounts payable requests in a single file. While sending the response, you need to ensure that the file contains the following for each accounts payable request:

- **Payment Selection Status** – Used to indicate the status of accounts payable request. The valid values are:
  - **P** – Used when the refund is paid to the customer.
  - **X** – Used when the refund is rejected in the external system.
- **Accounts Payable Request ID** – Used to identify the accounts payable request in ORMB.
- **Cancel Reason** – Used to specify the adjustment cancel reason. It is required when the payment selection status is set to **X**. Here, you can specify an adjustment cancel reason which is already defined in the system.
- **Payment Method** – Used to indicate how the payment is made to the customer. It is required when the payment selection status is set to **P**. Here, you can specify a value which is already defined in the **PYMNT_METHOD_FLG** lookup field.
- **Payment Currency** – Used to specify the currency in which the payment is made. It is required when the payment selection status is set to **P**. Here, you can specify a currency which is already defined in the system.
- **Payment Date** – Used to specify the date when the payment is made. It is required when the payment selection status is set to **P**. Here, you can specify the date in the **YYYY-MM-DD** format.
- **Payment Amount** – Used to specify the payment amount. It is required when the payment selection status is set to **P**.
- **Payment Number** – Used to specify the payment number using which you can track the payment in the external system. It is required when the payment selection status is set to **P**.

Oracle Revenue Management and Billing enables you to upload and process the response through the **File Upload Interface** utility. We have shipped the following three file request types with the product:

- **APUPDATECSV** - Used when you want to upload and process the accounts payable response in the **Comma-Separated Values** (**CSV**) format.
- **APUPDATEXML** - Used when you want to upload and process the accounts payable response in the **Extensible Markup Language** (**XML**) format.

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- **APUPDATEJSON** - Used when you want to upload and process the accounts payable response in the **JavaScript Object Notation** (**JSON**) format.

You can create similar file request types for the **Pipe-Separated Values** (**PSV**) and **Tilde-Delimited File** (**TILD**) formats.

Once you upload and process the files through the **File Upload Interface** utility, the system will update the following columns in the respective table depending on the response.

Accounts Payable Request is….	**Table Name**	**Column Name**
Accepted (i.e. Refund is paid)	CI_ADJ_APREQ	PYMNT_SEL_STAT_FLG
		PYMNT_METHOD_FLG
		CURRENCY_PYMNT
		PYMNT_DT
		PAID_AMT
		PYMNT_ID
Rejected (i.e. Refund is canceled)	CI_ADJ_APREQ	PYMNT_SEL_STAT_FLG
	CI_ADJ	CAN_RSN_CD

Appendix
A

Most Commonly Used Tasks

Topics:

- Changing the Layout

This section lists some of the common tasks that are performed while using various functionality in the application.

Changing the Layout

You can change the layout of the zone by:

- Removing a Column from the Zone on page 4410
- Adding a Column to the Zone on page 4410
- Rearranging Columns in the Zone on page 4410

Adding a Column to the Zone

Once you have removed the columns from the zone, you can add them back to the zone. To add a column to the zone:

1. Click the **Column Configuration** (⊘) icon in the upper right corner of the zone.
   A panel appears at the bottom of the zone with a list of column names.

   Note: The column names with the white background in the panel are currently not displayed in the zone.
2. Drag and drop the column name from the panel to the location where you want to add the column in the zone.
   The white background of the column name in the panel changes to the grey background indicating that the column is currently displayed in the zone.
3. If you want to add another column name from the panel to the zone, repeat the second step. Click the **Refresh** *b*utton, data will be displayed to the columns added in the zone.

Related Topics

For more information on...	See...
How to change the layout of the zone	Changing the Layout on page 4410

Rearranging Columns in the Zone

You can change the order in which the columns are displayed in the zone. To change the position of a column in the zone:

1. Click the column name whose position you want to change in the zone.
2. Drag and drop the column name between the columns where you want to place the selected column.
   The position of the column changes in the zone.

Related Topics

For more information on...	See...
How to change the layout of the zone	Changing the Layout on page 4410

Removing a Column from the Zone

To remove a column from the zone:

Click the **Delete** (🗑) icon corresponding to the column name that you want to remove from the zone.
The column is removed from the zone and is currently displayed with white background in the panel.

Note: Alternatively you can remove the column from the zone by clicking the Delete (🗑) icon corresponding to the column name in the panel.

Related Topics

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For more information on...	See...
How to change the layout of the zone	Changing the Layout on page 4410

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Appendix
B

Administration

Topics:

- UI Maps
- Feature Configurations

This section lists some of the administrative tasks.

UI Maps

This section explains how to create the UI maps for viewing and modifying data of the business objects within the approval workflow group.

Creating Display UI Map for an Approval Workflow Group

The system provides you with the ability to automatically generate a Display UI map, and associate it with the approval workflow group. Alternatively, you can create a Display UI map manually, and attach it to the approval workflow group.

Procedure

To create a Display UI map manually:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **U** and then click **UI Map**.
   A sub-menu appears.
3. Click the **Search** option from the **UI Map** sub-menu.
   The **UI Map** screen appears.
4. In the **Main** tab, enter the name and description of the Display UI map.

   Note: The system uses the `CM_<Approval Workflow Group Code>_AppTxn_Display` naming convention while automatically generating a Display UI map. Therefore, do not use this naming convention while creating a Display UI map manually.
5. Select **Complete HTML Document** from the **UI Map Type** list.
6. Click the **Schema** tab.
   The **Schema** tab appears.
7. Add the following schema in the **Scheme Editor** zone:

```
<schema>
 <<Business Object Name> type="group">
  <includeBO name="<Business Object Name>"/>
 </<Business Object Name>>
</schema>
```

   In the above schema, you must replace `<Business Object Name>` with the name of the business object. For example, if you want to create a Display UI map for account, you must use the following schema:

```
<schema>
 <account type="group">
  <includeBO name="Account"/>
 </account>
</schema>
```

8. Click the **Save** link in the **Actions/Navigation** area.
   The **Display Only** and **Input Map** buttons are enabled on the dashboard.
9. Click the **Display Only** button.
   The HTML code is generated in the **HTML Editor** zone.
10. Click the **Save** link in the **Actions/Navigation** area.
    The changes are saved.

Related Topics

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For more information on...	See...
How to define an approval workflow group	Defining an Approval Workflow Group on page 1025
How to edit an approval workflow group	Editing an Approval Workflow Group on page 1034

Creating Input UI Map for an Approval Workflow Group

The system provides you with the ability to automatically generate an Input UI map, and associate it with the approval workflow group. Alternatively, you can create an Input UI map manually, and attach it to the approval workflow group.

Procedure

To create an Input UI map manually:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **U** and then click **UI Map**.
   A sub-menu appears.
3. Click the **Search** option from the **UI Map** sub-menu.
   The **UI Map** screen appears.
4. In the **Main** tab, enter the name and description of the Input UI map.

   Note: The system uses the `CM_<Approval Workflow Group Code>_AppTxn_Input` naming convention while automatically generating an Input UI map. Therefore, do not use this naming convention while creating an Input UI map manually.
5. Select **Complete HTML Document** from the **UI Map Type** list.
6. Click the **Schema** tab.
   The **Schema** tab appears.
7. Add the following schema in the **Scheme Editor** zone:

```
<schema>
 <approvalTransactionId/>
 <action/>
 <<Business Object Name> type="group">
  <includeBO name="<Business Object Name>"/>
 </<Business Object Name>>
</schema>
```

   In the above schema, you must replace `<Business Object Name>` with the name of the business object. For example, if you want to create an Input UI map for account, you must use the following schema:

```
<schema>
 <approvalTransactionId/>
 <action/>
 <account type="group">
  <includeBO name="Account"/>
 </account>
</schema>
```

   The `<approvalTransactionId/>` tag is used in the schema to retrieve the approval transaction ID of the respective business object. The `<action/>` tag is used in the schema to retrieve the action performed by the submitter.
8. Click the **Save** link in the **Actions/Navigation** area.
   The **Display Only** and **Input Map** buttons are enabled on the dashboard.
9. Click the **Input Map** button.

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The HTML code is generated in the **HTML Editor** zone.

10. Add the following tag in the `head` tag:

```
<script language="javascript" type="text/javascript"  src="code/
approvalWorkflow.js"></script>
```

11. Add the text highlighted in bold within the tag as shown below:

```
<td>
<input onClick="performAction('<Approval Workflow Group Code>');" -
oraMdLabel="SAVE_BTN_LBL" class="oraButton" type="button">
<input onClick="oraSubmitMap('CANCEL', false);" oraMdLabel="CANCEL_LBL" -
class="oraButton" type="button">
</td>
```

In the above HTML code, you must replace `<Approval Workflow Group Code>` with the code of the approval workflow group for which you are creating a UI map.

12. Click the **Save** link in the **Actions/Navigation** area.
The changes are saved.

Related Topics

For more information on...	See...
How to define an approval workflow group	Defining an Approval Workflow Group on page 1025
How to edit an approval workflow group	Editing an Approval Workflow Group on page 1034

Feature Configurations

This section explains how to set various feature configurations which are required for implementing various features in Oracle Revenue Management and Billing.

Setting the C1_ACCTINFO Feature Configuration

Prerequisites

To set the **C1_ACCTINFO** feature configuration, you should have:

- Account Type characteristic type defined in the application (where the characteristic entity is set to Account)
- Invoice Group Account characteristic type defined in the application (where the characteristic entity is set to Account)

Procedure

To set the **C1_ACCTINFO** feature configuration:

1. Click the **Admin** link in the **Application** toolbar.
A list appears.
2. From the **Admin** menu, select **F** and then click **Feature Configuration**.
A sub-menu appears.
3. Click the **Search** option from the **Feature Configuration** sub-menu.
The **Feature Configuration Query** screen appears.
4. In the **Feature Configuration Search** zone, enter **C1_ACCTINFO** in the **Feature Name** field.

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Note: ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.

5. Click **Search**.
   A list of feature configurations that meet the search criteria appears in the search results.
6. In the **Search Results** section, click the link in the **Description** column corresponding to the feature configuration whose details you want to edit.

   The **Feature Configuration** screen appears. It contains the following option types:

Option Type	Description	Mandatory (Yes or No)
Account Type	Used to specify the characteristic type. This characteristic type is used to define the type of account in the **Account** screen.	Yes
	Note: By default, the **C1_F_ATY** characteristic type is specified. If you want to use account types other than the ones defined in the **C1_F_ATY** characteristic type, you need to create a new predefined characteristic type and add the required account types as its characteristic values. Then, specify the newly created characteristic type as the value for this option type.	
Invoice Group Account	Used to specify the characteristic type. This characteristic type is used to indicate whether the account is a master or member account in the **Account** screen.	Yes
	Note: By default, the **C1_F_IGA** characteristic type is specified. If you want to use any other characteristic type other than **C1_F_IGA**, you need to create a new predefined characteristic type and add two characteristic values - Y and N. Then, specify the newly created characteristic type as the value for this option type.	

7. Enter the values for the required option types in the **Feature Configuration** screen.
8. Click the **Save** button in the **Page Title** area.
   The changes made to the feature configuration are saved.

Related Topics

For more information on...	See...
Invoicing Group	Invoicing Group

Setting the C1-ASOBLLNG Feature Configuration

The **C1-ASOBLLNG** feature configuration enables the system to determine the following:

- Whether the approval transaction should be created while defining, editing, or deleting a self-funded pricing rule.
- Various parameters, characteristic types, and extendable lookup business objects which should be used for the fully-insured group, fully-insured individual, and self-funded business.
- Person relationship type using which the bill group should be related to the parent customer.

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- Policy person roles using which the parent customer and bill groups should be associated with the fully-insured group and self-funded policies.
- Status to which a policy should be transitioned on terminating, reinstating, or renewing the fully-insured group policy.
- Status to which a group membership should be transitioned on inactivating the main subscriber of the group membership.
- Status to which a member person of a group membership should be transitioned on inactivating the group membership.
- Status to which an individual membership should be transitioned on canceling the main subscriber of the individual membership.
- Status to which a member person of an individual membership should be transitioned on canceling the individual membership.
- Whether the plan-specific contracts should be created on the accounts for the fully-insured group policies.

Prerequisites

To set the **C1-ASOBLLNG** feature configuration, you should have:

- Required policy person roles, account relationship types, and person relationship types defined in the application
- Approval workflow settings configured for the **C1PRCANC**, **C1PRCASL**, **C1PRCRLCLM**, **C1PRCDA**, **C1PRFLTFEE**, **C1PRCLVLFN**, **C1PRETCLM**, **C1PRRETENR**, and **C1PRCSSL** approval workflow groups
- Required approval workflow group defined for the Minimum Premium Program (MPP) pricing rule and approval workflow settings configured for the MPP approval workflow group
- Required characteristic types defined in the application
- Values defined for the **C1-ExtLookClaimTemplate**, **C1-ExtLookPricingRuleLineItem**, and **C1-ExtLookRetTypeRateOpt** extendable lookups
- Predefined values defined for the **C1INVTYP** characteristic type
- Required SQIs defined in the application
- Pricing arrangement parameter defined in the application (where the value type is set to **Adhoc**, source entity is set to **Transaction**, and the parameter usage is set to **Price Item**
- Billable charge line type parameter defined in the application (where the value type is set to **Adhoc**, source entity is set to **Transaction**, and the parameter usage is set to **Price Item**
- Pricing group rule parameter defined in the application (where the value type is set to **Adhoc**, source entity is set to **Transaction**, and the parameter usage is set to **Price Item**
- A predefined characteristic type named **Active Employee Coverage Billing Arrangement** defined with the following characteristic values:

Characteristic Value	Description
DRT	Direct Billing
GRP	Group Billing

  You must set the characteristic entity of the **Active Employee Coverage Billing Arrangement** characteristic type to **Person**.
- A predefined characteristic type named **Benefit Billing Arrangement** defined with the following characteristic values:

Characteristic Value	Description
DRT	Direct Billing
GRP	Group Billing

  You must set the characteristic entity of the **Benefit Billing Arrangement** characteristic type to **Person**, **Policy**, and **Policy Plan**.
- A predefined characteristic type named **COBRA Billing Arrangement** defined with the following characteristic values:

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Characteristic Value	Description
DRT	Direct Billing
GRP	Group Billing
TPA	TPA Billing

You must set the characteristic entity of the **COBRA Billing Arrangement** characteristic type to **Person**, **Policy**, and **Policy Plan**.

- Required billing preference, binder payment preference, geographic rating area preference for fully-insured group and individual, medicare preference, member relationship and subscription tier preference, and membership status reason preference defined in the application.

Procedure

To set the **C1-ASOBLLNG** feature configuration:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **F** and then click **Feature Configuration**.
   A sub-menu appears.
3. Click the **Search** option from the **Feature Configuration** sub-menu.
   The **Feature Configuration Query** screen appears.
4. In the **Feature Configuration Search** zone, enter **C1-ASOBLLNG** in the **Feature Name** field.

> **Note:** ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.

5. Click **Search**.
   A list of feature configurations that meet the search criteria appears in the search results.
6. In the **Search Results** section, click the link in the **Description** column corresponding to the feature configuration whose details you want to edit.

   The **Feature Configuration** screen appears. It contains the following option types:

Option Type	Description	Mandatory (Yes or No)
Account Identifier Type Char Type	Used to specify the characteristic type which stores the account identifier type. It is used to determine the account to which you want to bill the group or individual membership.	Yes (Conditional) **Note:** This data is required while billing a group or individual membership.
	Note: You must specify a characteristic type where the characteristic entity is set to **Membership**.	
Account Identifier Value Char Type	Used to specify the characteristic type which stores the account identifier. It is used to determine the account to which you want to bill the group or individual membership.	Yes (Conditional) **Note:** This data is required while billing a group or individual membership.

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Option Type	Description	Mandatory (Yes or No)
	Note: You must specify a characteristic type where the characteristic entity is set to **Membership**.	
Age Based Parameter	Used to specify the parameter using which you want to define the lower age limit and upper age limit pricing eligibility criteria in an age based pricing. **Note:** The **AGEBASED** parameter is shipped with the product. By default, the value is set to **AGEBASED**. You can change the value, if required. However, note that you must specify an adhoc parameter where source entity is set to **Algorithm**, source type code is set to **Calculate membership person's age**, and the parameter usage is set to **Pricing Eligibility Criteria**.	Yes (Conditional) **Note:** This data is required while defining an age based pricing rule.
Approval Workflow Group for ASL	Used to specify the approval workflow group for an aggregate stop-loss pricing rule. It helps the system to determine whether the approval transaction should be created while defining, editing, or deleting an aggregate stop-loss pricing rule. **Note:** The **C1PRCASL** approval workflow group for an aggregate stop-loss pricing rule is shipped with the product. By default, the value is set to **C1PRCASL**. You can change the value, if required.	Yes (Conditional) **Note:** This data is required while enabling the approval workflow process for an aggregate stop-loss pricing rule.
Approval Workflow Group for Ancillary	Used to specify the approval workflow group for an ancillary pricing rule. It helps the system to determine whether the approval transaction should be created while defining, editing, or deleting an ancillary pricing rule. **Note:** The **C1PRCANC** approval workflow group for an ancillary pricing rule is shipped with the product. By default, the value is set to **C1PRCANC**. You can change the value, if required.	Yes (Conditional) **Note:** This data is required while enabling the approval workflow process for an ancillary pricing rule.
Approval Workflow Group for Claim	Used to specify the approval workflow group for a claim pricing rule. It helps the system to determine whether the approval transaction should be created	Yes (Conditional)

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Option Type	Description	Mandatory (Yes or No)
	while defining, editing, or deleting a claim pricing rule. **Note:** The **C1PRCRLCLM** approval workflow group for a claim pricing rule is shipped with the product. By default, the value is set to **C1PRCRLCLM**. You can change the value, if required.	**Note:** This data is required while enabling the approval workflow process for a claim pricing rule.
Approval Workflow Group for Flat Fees	Used to specify the approval workflow group for the one-time and recurring flat fees pricing rules. It helps the system to determine whether the approval transaction should be created while defining, editing, or deleting the one-time and recurring flat fees pricing rules. **Note:** The **C1PRFLTFEE** approval workflow group for the one-time and recurring flat fees pricing rules is shipped with the product. By default, the value is set to **C1PRFLTFEE**. You can change the value, if required.	Yes (Conditional) **Note:** This data is required while enabling the approval workflow process for the one-time and recurring flat fees pricing rules.
Approval Workflow Group for Level Funded	Used to specify the approval workflow group for the enrollment based premium and flat rate based premium level funded pricing rules. It helps the system to determine whether the approval transaction should be created while defining, editing, or deleting the enrollment based premium and flat rate based premium level funded pricing rules. **Note:** The **C1PRCLVLFN** approval workflow group for the enrollment based premium and flat rate based premium level funded pricing rules is shipped with the product. By default, the value is set to **C1PRCLVLFN**. You can change the value, if required.	Yes (Conditional) **Note:** This data is required while enabling the approval workflow process for the enrollment based premium and flat rate based premium level funded pricing rules.
Approval Workflow Group for MPP	Used to specify the approval workflow group for a minimum premium program pricing rule. It helps the system to determine whether the approval transaction should be created while defining, editing, or deleting a minimum premium program pricing rule.	Yes (Conditional) **Note:** This data is required while enabling the approval workflow process for the minimum premium program pricing rules.
Approval Workflow Group for Retention Type Claim Based	Used to specify the approval workflow group for a retention type claim based pricing rule. It helps the system to determine whether the approval	Yes (Conditional)

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Option Type	Description	Mandatory (Yes or No)
	transaction should be created while defining, editing, or deleting a retention type claim based pricing rule. **Note:** The **C1PRETCLM** approval workflow group for a retention type claim based pricing rule is shipped with the product. By default, the value is set to **C1PRETCLM**. You can change the value, if required.	**Note:** This data is required while enabling the approval workflow process for a retention type claim based pricing rule.
Approval Workflow Group for Retention Type Enrollment Based	Used to specify the approval workflow group for a retention type enrollment based pricing rule. It helps the system to determine whether the approval transaction should be created while defining, editing, or deleting a retention type enrollment based pricing rule. **Note:** The **C1PRRETENR** approval workflow group for a retention type enrollment based pricing rule is shipped with the product. By default, the value is set to **C1PRRETENR**. You can change the value, if required.	Yes (Conditional) **Note:** This data is required while enabling the approval workflow process for a retention type enrollment based pricing rule.
Approval Workflow Group for SSL	Used to specify the approval workflow group for a specific stop-loss pricing rule. It helps the system to determine whether the approval transaction should be created while defining, editing, or deleting a specific stop-loss pricing rule. **Note:** The **C1PRCSSL** approval workflow group for a specific stop-loss pricing rule is shipped with the product. By default, the value is set to **C1PRCSSL**. You can change the value, if required.	Yes (Conditional) **Note:** This data is required while enabling the approval workflow process for a specific stop-loss pricing rule.
Approval Workflow Group-Discount Arrangement	Used to specify the approval workflow group for the discount share and discount guarantee pricing rules. It helps the system to determine whether the approval transaction should be created while defining, editing, or deleting the discount share and discount guarantee pricing rules.	Yes (Conditional) **Note:** This data is required while enabling the approval workflow process for the discount share and discount guarantee pricing rules.

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Option Type	Description	Mandatory (Yes or No)
	Note: The **C1PRCDA** approval workflow group for the discount share and discount guarantee pricing rules is shipped with the product. By default, the value is set to **C1PRCDA**. You can change the value, if required.	
Base Fee PC Sequence Characteristic	Used to specify the characteristic type where you want to store the sequence number of the eligible base fee's price component. This characteristic is then passed to the rating engine for further processing.	Yes (Conditional) **Note:** This data is required while billing fully-insured group and individual health plans.
	Note: The **C1BSFESE** characteristic type is shipped with the product. By default, the value is set to **C1BSFESE**. You can change the value, if required. However, note that you must specify an adhoc characteristic type where the characteristic entity is set to **Rate Component**.	
Benefit Billing Arrangement	Used to specify the characteristic type which indicates whom to bill the premium for a Medicare group membership. This characteristic type is defined for a policy plan, policy, and/or parent customer. The system then uses this characteristic type to determine whom to bill the Medicare group membership premium.	Yes (Conditional) **Note:** This data is required while billing the premium for a Medicare group membership.
Bill Cycle Rule Code	Used to specify the characteristic type. The system considers this characteristic type to determine the billing preference for an account. If the billing preference characteristic is defined for the account, the system derives the bill cycle, bill period, and skip months for the account from the billing preference.	Yes (Conditional) **Note:** This data is required when: • You want the bill cycle and bill period to be tightly coupled with each other. • You want to skip billing for an account for one or more months of the coverage period.
	Note: You must specify a characteristic type where the characteristic entity is set to **Account**. This option type is only applicable for the fully insured group and individual lines of business. This option type is referred while deriving the bill cycle, bill period, and skip months for an account. For more information, see Tightly Coupled Bill Cycle and Bill Period through Billing Preference on page 3492 and 9/10 Billing (Skip Months) on page 3494.	

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Option Type	Description	Mandatory (Yes or No)
Bill Group Policy Person Role	Used to specify the policy person role using which a bill group should be associated with a fully-insured group or self-funded policy when the policy information is given for the bill group in an inbound message. **Note:** You must specify a policy person role which is already defined in the system.	Yes
Bill Seg Req Reference Id Char Type	Used to indicate the characteristic type where you want to store the request reference ID. During the fully-insured group and individual bill segment generation, this characteristic is stamped on a bill segment calculation line which indicates the repricing request for which the bill segment calculation line is created. **Note:** You must specify a characteristic type where the characteristic entity is set to **Bill Segment Calc Line**.	Yes (Conditional) **Note:** This data is required while billing fully-insured group and individual health plans.
Billable Charge Line Type Parameter	Used to specify the parameter in which you want to store the billable charge line type. This parameter can then be used while defining an ancillary pricing rule type. **Note:** You must specify an adhoc parameter where the source entity is set to **Transaction** and the parameter usage is set to **Price Item**.	Yes (Conditional) **Note:** This data is required while defining an ancillary pricing rule type.
Billing Arrangement	Used to specify the characteristic type which indicates whom to bill the premium for an active employee coverage group membership. This characteristic type is defined for a parent customer and/or bill group. The system then uses this characteristic type to determine whom to bill the active employee coverage group membership premium.	Yes (Conditional) **Note:** This data is required while billing the premium for an active employee coverage group membership.
Binder Payment Field Mapping	Used to specify a binder payment preference. The system considers the various attributes of the binder payment preference while creating and monitoring binder payments for an individual membership. **Note:** You must specify a binder payment preference which is already defined in the system.	Yes (Conditional) **Note:** This data is required while creating and monitoring binder payments for an individual membership.
Claim Template Extendable Lookup Business Object	Used to specify the claim template extendable lookup business object. The system displays the values of the specified extendable lookup in the **Claim Template** list while defining or editing a claim pricing rule type.	Yes

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Option Type	Description	Mandatory (Yes or No)
	Note: The **C1-ExtLookClaimTemplate** extendable lookup for claim template is shipped with the product. By default, the value is set to **C1-ExtLookClaimTemplate**. You can change the value, if required.	
Cobra Billing Arrangement	Used to specify the characteristic type which indicates whom to bill the premium for a COBRA group membership. This characteristic type is defined for a policy plan, policy, and/or parent customer. The system then uses this characteristic type to determine whom to bill the COBRA group membership premium.	Yes (Conditional) **Note:** This data is required while billing the premium for a COBRA group membership.
Customer Registration ID Characteristic for Inbound Log	Used to specify the characteristic type where you want to store the customer registration ID. This characteristic type is used while creating a log entry for a health care inbound message. The log entry then indicates the customer registration object which is created through the health care inbound message. **Note:** The **C1CRLOG** characteristic type is shipped with the product. By default, the value is set to **C1CRLOG**. You can change the value, if required. However, note that you must specify a foreign key characteristic type where the characteristic entity is set to **Inbound Message Log**.	Yes (Conditional) **Note:** This data is required while creating a person, account, policy, and/or policy plan through a health care inbound message.
Default Flat Rate Option	Used to specify the rate option which must be used by default when the rate option is not given and the modifier method is set to either **FLAT** or **NULL** in the pricing rule data of a health care inbound message. **Note:** You must specify a rate option where the rate schedule is set to **HC_FRTSC**.	Yes (Conditional) **Note:** This data is required while creating an age based and tier based pricing.
Default Percentage Rate Option	Used to specify the rate option which must be used by default when the rate option is not given and the modifier method is set to either **EXPT** or **INPT** in the pricing rule data of a health care inbound message. **Note:** You must specify a rate option where the rate schedule is set to **HC_PRTSC**.	Yes (Conditional) **Note:** This data is required while creating an age based and tier based pricing.

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Option Type	Description	Mandatory (Yes or No)
Invoice Type Characteristic Type	Used to specify the characteristic type which indicates the type of account. This characteristic type is defined for the account. The system then uses this characteristic type to determine the account on which the claim, specific stop-loss credits, aggregate stop-loss credits, claim based fee, enrollment based fee, one-time flat fees, recurring flat fees, ancillary, discount, or level funded billable charges should be created in the system. For more information, refer to Bill Group's Account on page 13. **Note:** The **C1INVTYP** characteristic type is shipped with the product. By default, the value is set to **C1INVTYP**. You can change the value, if required. However, note that you must specify a predefined characteristic type where the characteristic entity is set to **Account**.	Yes
Line Item Extendable Lookup Business Object	Used to specify the line item extendable lookup business object. The system displays the values of the specified extendable lookup in the **Line Item** list while defining, editing, or copying a claim template. **Note:** The **C1-ExtLookPricingRuleLineItem** extendable lookup for line item is shipped with the product. By default, the value is set to **C1-ExtLookPricingRuleLineItem**. You can change the value, if required.	Yes
Medicare	Used to specify a Medicare preference. The system considers the various attributes of the Medicare preference while creating charges for Medicare Part D Low Income Subsidy (LIS) and Late Enrollment Penalty (LEP). **Note:** You must specify a Medicare preference which is already defined in the system.	Yes (Conditional) **Note:** This data is required while creating charges for Medicare Part D LIS and LEP.
Membership Cancel Status	Used to specify the status to which an individual membership should be transitioned when the status of its main subscriber is set to **Canceled**. **Note:** You must specify a status which is defined in the lifecycle of the **C1-IndMembership** business object.	Yes (Conditional) **Note:** This data is required while canceling an individual membership.

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Option Type	Description	Mandatory (Yes or No)
Membership Characteristic for Inbound Log	Used to specify the characteristic type where you want to store the membership ID. This characteristic type is used while creating a log entry for a health care inbound message. The log entry then indicates the group or individual membership which is created through the health care inbound message. **Note:** The **C1MBRLOG** characteristic type is shipped with the product. By default, the value is set to **C1MBRLOG**. You can change the value, if required. However, note that you must specify a foreign key characteristic type where the characteristic entity is set to **Inbound Message Log**.	Yes (Conditional) **Note:** This data is required while creating a group or individual membership through a health care inbound message.
Membership ID Characteristic for Billable Charge	Used to specify the characteristic type where you want to store the membership ID. During the fully-insured group and individual billable charge creation process, this characteristic is stamped on a billable charge which indicates the group or individual membership for which the billable charge is created. **Note:** You must specify a foreign key characteristic type where the characteristic entity is set to **Billable Charge**.	Yes (Conditional) **Note:** This data is required while billing a group or individual membership.
Membership Inactive Status	Used to specify the status to which a group membership should be transitioned when its main subscriber is inactivated. **Note:** You must specify a status which is defined in the lifecycle of the **C1-Membership** business object.	Yes (Conditional) **Note:** This data is required while inactivating a group membership.
Membership Person Cancel Status	Used to specify the status to which the member persons of an individual membership should be transitioned when the individual membership is canceled. **Note:** You must specify a status which is defined in the **MEMBER_PER_STATUS_FLG** lookup field.	**Note:** This data is required while canceling an individual membership.
Membership Person Inactive Status	Used to specify the status to which the member persons of a group membership should be transitioned when the group membership is inactivated.	Yes (Conditional) **Note:** This data is required while inactivating a group membership.

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Option Type	Description	Mandatory (Yes or No)
	Note: You must specify a status which is defined in the **MEMBER_PER_STATUS_FLG** lookup field.	
Off-process Request Detail Maximum Count	Used to indicate the maximum number of amendment details you can specify in an off-process request.	Yes (Conditional) **Note:** This data is required while creating an off-process request.
Override Proration Applicability Characteristic Type	Used to specify the characteristic type which indicates whether the proration rule should be overridden for a member person. At present, the override proration feature is used for a new born when the gift days are offered to a new born. This characteristic type can be defined for the group membership, policy plan, policy, and state. **Note:** You must specify a characteristic type where the characteristic entity is set to **Membership**, **Policy Plan**, **Policy**, and **State**. Here, the predefined values for the characteristic type can be **Y** and **N**.	Yes (Conditional) **Note:** This data is required when you want to override the proration rule.
Override Proration Effective Date Characteristic Type	Used to specify the characteristic type where you want to store the date from when the premium should be calculated for the new born. This characteristic is used during the bill segment generation to determine the bill period in which the date falls. The system then accordingly prorates the premium amount for the new born. **Note:** You must specify a characteristic type where the characteristic entity is set to **Membership Person**.	Yes (Conditional) **Note:** This data is required when you want to override the proration rule.
Override Proration Rule Characteristic Type	Used to specify the characteristic type where you want to store the override SQ rule for a new born. This characteristic type can be defined for the group membership, policy plan, policy, and state. If this characteristic is not defined at any level, the system uses the SQ rule of the rate schedule attached to the active contract to prorate the premium amount of a new born child. **Note:** You must specify a characteristic type where the characteristic entity is set to **Membership**, **Policy Plan**, **Policy**, and **State**.	Yes (Conditional) **Note:** This data is required when you want to override the proration rule.
Parent Customer Policy Person Role	Used to specify the policy person role using which the parent customer should be associated with a fully-insured group or self-funded policy when the policy information is given for the bill group or parent customer in an inbound message.	Yes

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Option Type	Description	Mandatory (Yes or No)
	Note: You must specify a policy person role which is already defined in the system.	
Person ID Characteristic for Inbound Log	Used to specify the characteristic type where you want to store the person ID. This characteristic type is used while creating a log entry for a health care inbound message. The log entry then indicates the person whose record is created through the health care inbound message. **Note:** The **C1PERLOG** characteristic type is shipped with the product. By default, the value is set to **C1PERLOG**. You can change the value, if required. However, note that you must specify a foreign key characteristic type where the characteristic entity is set to **Inbound Message Log**.	Yes (Conditional) **Note:** This data is required while creating a person through a health care inbound message.
Person Identifier Type Char Type	Used to specify the characteristic type which stores the person identifier type. It is used to determine the person to whom you want to bill the group or individual membership. **Note:** You must specify a characteristic type where the characteristic entity is set to **Membership**.	Yes (Conditional) **Note:** This data is required while billing a group or individual membership.
Person Identifier Value Char Type	Used to specify the characteristic type which stores the person identifier. It is used to determine the person to whom you want to bill the group or individual membership. **Note:** You must specify a characteristic type where the characteristic entity is set to **Membership**.	Yes (Conditional) **Note:** This data is required while billing a group or individual membership.
Person Relationship Type	Used to indicate how a bill group should be related to a parent customer. The system uses the person relationship type while: • Creating a bill group for a parent customer through an inbound message • Viewing the 360° information of a parent customer **Note:** You must specify a person relationship type which is already defined in the system.	Yes
Plan Based Contract Characteristic Type	Used to specify the characteristic type which helps to determine whether the system should create plan-specific contracts for a price item. This	Yes (Conditional)

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Option Type	Description	Mandatory (Yes or No)
	characteristic must be defined on the person for whom you want to create plan-specific contracts on the accounts. **Note:** You must specify a characteristic type where the characteristic entity is set to **Person**.	**Note:** This data is required when you want to enable the plan-specific contract creation feature for specific persons in the fully-insured group health plan business.
Plan Based Contract Characteristic Value	Used to specify the characteristic value which indicates that the system should create plan-specific contracts for a price item on the accounts.	Yes (Conditional) **Note:** This data is required when you want to enable the plan-specific contract creation feature for specific persons in the fully-insured group health plan business.
Plan Based Contract Creation Eligibility	Used to indicate whether the system should create plan-specific contract for a price item on the account. The valid value is **Yes**.	Yes (Conditional) **Note:** This data is required when you want to enable the plan-specific contract creation feature for the fully-insured group health plan business.
Plan Id Characteristic Type	Used to specify the characteristic type where you want to store the plan for which the contract is created. During the fully-insured group policy plan contract creation, this characteristic is defined on the contract. **Note:** You must specify a characteristic type where the characteristic entity is set to **Contract**.	Yes (Conditional) **Note:** This data is required when you want to enable the plan-specific contract creation feature for the fully-insured group health plan business.
Policy Reinstatement Status	Used to specify the status to which the policy must be transitioned when it is reinstated. **Note:** You must specify a status which is defined in the lifecycle of the **C1-POLICY** business object.	Yes (Conditional) **Note:** This data is required while reinstating a fully-insured group policy.
Policy Renewal Status	Used to specify the status to which the policy must be transitioned when it is renewed. **Note:** You must specify a status which is defined in the lifecycle of the **C1-POLICY** business object.	Yes (Conditional) **Note:** This data is required while renewing a fully-insured group policy.
Policy Termination Status	Used to specify the status to which the policy must be transitioned when it is terminated. **Note:** You must specify a status which is defined in the lifecycle of the **C1-POLICY** business object.	Yes (Conditional) **Note:** This data is required while terminating a fully-insured group policy.

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Option Type	Description	Mandatory (Yes or No)
Pricing Arrangement Parameter	Used to specify the parameter in which you want to store the pricing arrangement. This parameter can then be used while defining an ancillary pricing rule type. **Note:** You must specify an adhoc parameter where the source entity is set to **Transaction** and the parameter usage is set to **Price Item**.	Yes (Conditional) **Note:** This data is required while defining an ancillary pricing rule type.
Pricing Group Rule Parameter	Used to specify the parameter in which you want to store the pricing group rule. The system stamps this parameter on the price assignment which is created through a pricing rule using a pricing group. It indicates that the price assignment is created using the respective rule in the pricing group. **Note:** You must specify an adhoc parameter where the source entity is set to **Transaction** and the parameter usage is set to **Price Item**.	Yes (Conditional) **Note:** This data is required while defining a claim, specific stop-loss, aggregate stop-loss, retention type claim based, or retention type enrollment based pricing rule for a bill group using a pricing group.
Pricing Rule ID Characteristic for Inbound Log	Used to specify the characteristic type where you want to store the pricing rule ID. This characteristic type is used while creating a log entry for a health care inbound message. The log entry then indicates the pricing rule which is created through the health care inbound message. **Note:** The **C1PRLOG** characteristic type is shipped with the product. By default, the value is set to **C1PRLOG**. You can change the value, if required. However, note that you must specify a foreign key characteristic type where the characteristic entity is set to **Inbound Message Log**.	Yes (Conditional) **Note:** This data is required while creating a pricing rule through a health care inbound message.
Pricing Rule Type Category Characteristic	Used to specify the characteristic type which indicates the pricing rule type category. This characteristic type is defined for a billable charge line type. The system uses this characteristic to lists the billable charge line types which are valid while defining a pricing rule type or pricing rule of a particular category.	Yes

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Option Type	Description	Mandatory (Yes or No)
	Note: The **C1PRTCAT** characteristic type is shipped with the product. By default, the value is set to **C1PRTCAT**. You can change the value, if required. However, note that you must specify a foreign key characteristic type where the characteristic entity is set to **Billable Charge Line Type**.	
Proration Distributed SQI	Used to specify the SQI where you want to store the distributed premium amount for the non-skip billing period. The system uses this SQI while creating the SQI based billable charge for the group membership premium. **Note:** You must specify an SQI which is already defined in the system.	es (Conditional) **Note:** This data is required when the **9/10 Billing (Skip Months)** feature is enabled for an account.
Proration SQI	Used to specify the SQI where you want to store the pre-calculated or calculated premium amount. The system uses this SQI while creating the SQI based billable charge for the group or individual membership premium. **Note:** You must specify an SQI which is already defined in the system.	Yes (Conditional) **Note:** This data is required while billing fully-insured group and individual health plans.
Rate Component Base Fee Characteristic	Used to specify the characteristic type which indicates whether the rate component is a base fee rate component. This characteristic type is defined for the rate component. **Note:** The **C1RCBFMA** characteristic type is shipped with the product. By default, the value is set to **C1RCBFMA**.	Yes
Rate Option Extendable Lookup Business Object	Used to specify the rate option extendable lookup business object. The system displays the values of the specified extendable lookup in the **Rate Option** list while defining, editing, or copying a pricing rule type.	Yes

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Option Type	Description	Mandatory (Yes or No)
	Note: The **C1-ExtLookRetTypeRateOpt** extendable lookup for rate option is shipped with the product. By default, the value is set to **C1-ExtLookRetTypeRateOpt**. You can change the value, if required.	
Rating Area Field Mapping for Group	Used to specify a geographic rating area preference. The system considers the various attributes of the geographic rating area preference while deriving the geographic rating area for a group membership. **Note:** You must specify a geographic rating area preference which is already defined in the system.	Yes (Conditional) **Note:** This data is required while deriving the geographic rating area for a group membership.
Rating Area Field Mapping for Individual	Used to specify a geographic rating area preference. The system considers the various attributes of the geographic rating area preference while deriving the geographic rating area for an individual membership. **Note:** You must specify a geographic rating area preference which is already defined in the system.	Yes (Conditional) **Note:** This data is required while deriving the geographic rating area for an individual membership.
Reinsurer Person Relationship Type	Used to indicate the relationship type using which the reinsurer person should be associated with the parent customer. **Note:** You must specify a reinsurer person relationship type which is already defined in the system.	Yes (Conditional) **Note:** This data is required while associating the reinsurer person with the parent customer.
Relation Structure Code Field Mapping	Used to specify a member relationship and subscription tier preference. The system considers the various attributes of the member relationship and subscription tier preference while deriving the member relationship for a member person and the subscription tier for a group or individual membership. **Note:** You must specify a member relationship and subscription tier preference which is already defined in the system.	Yes (Conditional) **Note:** This data is required while deriving the member relationship for a member person and the subscription tier for a group or individual membership.
Sponsored Switch Characteristic for Billable Charge	Used to specify the characteristic type which indicates whether the billable charge is a reverse charge for a membership benefit. This characteristic type is defined while creating the reverse charge for a membership benefit.	Yes (Conditional) **Note:** This data is required while creating the reverse charge for a benefit.

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Option Type	Description	Mandatory (Yes or No)
	Note: You must specify a characteristic type where the characteristic entity is set to **Billable Charge**.	
State of Issue Characteristic Type	Used to specify the characteristic type where you store the state for which the group or individual membership, policy plan, or policy is issued. This characteristic type can be defined for the group or individual membership, policy plan, or policy. This characteristic is used while identifying a list of eligible children in a group or individual membership for premium calculation. **Note:** You must specify a characteristic type where the characteristic entity is set to **Membership**, **Policy Plan**, and **Policy**.	Yes (Conditional) **Note:** This data is required while identifying a list of eligible children for premium calculation.
Statement Construct Char for Inbound Log	Used to specify the characteristic type where you want to store the statement construct ID. This characteristic type is used while creating a log entry for a health care inbound message. The log entry then indicates the statement construct which is created through the health care inbound message. **Note:** You must specify a characteristic type where the characteristic entity is set to **Statement Construct for Inbound Log**.	Yes (Conditional) **Note:** This data is required while creating a log entry for a health care inbound message.
Status Reason Mapping	Used to specify a membership status reason preference. The system considers the various attributes of the membership status reason preference while deriving the individual membership or member person status reason. **Note:** You must specify a membership status reason preference which is already defined in the system.	Yes (Conditional) **Note:** This data is required while maintaining an individual membership.
To Do Role Characteristic Type	Used to specify the characteristic type where you want to store the To Do role. This characteristic type is defined for the parent customer. The system uses this characteristic to determine the users to whom the To Dos created using the **C1-REPC1**, **C1-REPC2**, and **C1-FIBCR** To Do types should be assigned.	Yes (Conditional) **Note:** This data is required while billing fully-insured group and individual health plans.

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Option Type	Description	Mandatory (Yes or No)
	Note: A To Do is created using the **C1-REPC1** To Do type when an error occurs while creating a repricing request. A To Do is created using the **C1-REPC2** To Do type when an error occurs while calculating group or individual membership premium. A To Do is created using the **C1-FIBCR** To Do type when an error occurs while creating a billable charge for a group and individual membership. You must specify an adhoc characteristic type where the characteristic entity is set to **Person**.	
TPA Account Relationship Type	Used to indicate how a third party administrator (TPA) person should be related to its account. The system uses this account relationship type while creating a TPA account for a TPA person through a health care inbound message. **Note:** You must specify an account relationship type which is already defined in the system.	Yes (Conditional) **Note:** This data is required while creating a TPA account through a health care inbound message.
TPA Person Relationship Type	Used to indicate how a third party administrator (TPA) person should be related to its parent customer. The system uses this person relationship type while creating a TPA person for a parent customer through a health care inbound message. **Note:** You must specify a person relationship type which is already defined in the system.	Yes (Conditional) **Note:** This data is required while creating a TPA person through a health care inbound message.
TPA Policy Person Role	Used to specify the policy person role using which a third party administrator (TPA) person should be associated with a fully-insured group policy when the policy information is given for the TPA person in a health care inbound message. **Note:** You must specify a policy person role which is already defined in the system.	Yes (Conditional) **Note:** This data is required while associating a TPA person with a fully-insured group policy through a health care inbound message.

7. Enter the values for the required option types in the **Feature Configuration** screen.
8. Click the **Save** button in the **Page Title** area.
   The changes made to the feature configuration are saved.

Related Topics

For more information on...	See...
Customer 360° Information screen	Customer 360° Information on page 607
Health Care Inbound Message	Health Care Inbound Message on page 2274

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Setting the C1_AXENTITY Feature Configuration

The **C1_AXENTITY** feature configuration enables you to configure various settings related to the **Approval Workflow** feature.

Prerequisites

To set the **C1_AXENTITY** feature configuration, you should have:

- An algorithm defined using the **C1-APPTXN** algorithm type in the application
- To Do types defined in the application
- Fields defined in the application
- XSL files that you want to use for the Input and Display UI maps

Procedure

To set the **C1_AXENTITY** feature configuration:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **F** and then click **Feature Configuration**.
   A sub-menu appears.
3. Click the **Search** option from the **Feature Configuration** sub-menu.
   The **Feature Configuration Query** screen appears.
4. In the **Feature Configuration Search** zone, enter **C1_AXENTITY** in the **Feature Name** field.

   Note: ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.
5. Click **Search**.
   A list of feature configurations that meet the search criteria appears in the search results.
6. In the **Search Results** section, click the link in the **Description** column corresponding to the feature configuration whose details you want to edit.

   The **Feature Configuration** screen appears. It contains the following option types:

Option Type	Description	Mandatory (Yes or No)
Approval Transaction Compare New or Missing Entry Color	Used to indicate the color in which you want to highlight the new record or new additions made to the existing record. This helps in comparing the existing and new data while reviewing an approval transaction. **Note:** You must specify a hexadecimal value for this option type.	Yes
Approval Transaction Compare Value Changed Color	Used to indicate the color in which you want to highlight the modifications made to the existing data. This helps in comparing the existing and new data while reviewing an approval transaction. **Note:** You must specify a hexadecimal value for this option type.	Yes

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Option Type	Description	Mandatory (Yes or No)
Approval Transaction Entity Access Algorithms	Used to specify the algorithm which controls access to the maintenance objects based on the access group and division. **Note:** By default, the value is set to **C1-APPTXN**. If you create new maintenance objects and want to control the access of these new maintenance objects based on the access group and division, you have to create a custom algorithm and then attach it to this option type. In such case, you will have to define this option type twice - one with the default algorithm (that is, **C1-APPTXN**) and another with the custom algorithm.	Yes
Approval Transaction Field Masking	Used to specify the business object for masking the approval transaction field in the approval workflow group schema. **Note:** If you do not specify the business object, masking is disabled for the respective field.	Yes
Approval Transaction Resolve To Do Type	Used to indicate that To Do entry of the specified To Do type must be created when an approver at any level in the hierarchy rejects an approval transaction. **Note:** You must specify a To Do type which is already defined in the system.	Yes
Approval Transaction screen timeout	Used to indicate the time (in minutes) in which the screen timeout message should appear in the **Comparison: New versus Existing** screen when the system takes longer time to display an approval transaction.	Yes
Disable Approval Transaction Fields in Input UI Maps	Used to indicate the fields that you want to disable whenever the input UI maps are regenerated. **Note:** You must specify a field which is already defined in the application.	Yes
Display Existing Panel on Left Side (Y/N)	Used to indicate whether you want to view the existing or new data in the left panel while reviewing an approval transaction. The valid values are: • **Y** - Used when you want the existing data to appear in the left panel of the **Comparison: New versus Existing** screen. • **N** - Used when you want the new data to appear in the left panel of the **Comparison: New versus Existing** screen. **Note:** If you do not specify the value for this option type, by default, it is set to **N**.	No
Display Information String	Used to indicate whether the approval transaction information string should appear in the **Comparison: New versus Existing** screen when you are reviewing an approval transaction of a construct. The valid values are: • true • false	Yes

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Option Type	Description	Mandatory (Yes or No)
Display UI XSL	Used to indicate the XSL file that you want to use while regenerating the Display UI maps.	Yes
Display only Differences of fields on UI	Used to indicate whether you want to view only those fields of a record where the data is added or updated or all fields of a record while reviewing an approval transaction. The valid values are: • **Yes** - Used when you want to view only those fields of a record where the data is added or updated in the **Comparison: New versus Existing** screen. • **No** - Used when you want to view all fields of a record in the **Comparison: New versus Existing** screen.	Yes
Input UI XSL	Used to indicate the XSL file that you want to use while regenerating the Input UI maps.	Yes

7. Enter the values for the required option types in the **Feature Configuration** screen.
8. Click the **Save** button in the **Page Title** area.
   The changes made to the feature configuration are saved.

Setting the C1-BILLADJSQ Feature Configuration

Prerequisites

To set the **C1-BILLADJSQ** feature configuration, you should have:

- Service quantity identifiers (SQIs) defined in the application

Procedure

To set the **C1-BILLADJSQ** feature configuration:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **F** and then click **Feature Configuration**.
   A sub-menu appears.
3. Click the **Search** option from the **Feature Configuration** sub-menu.
   The **Feature Configuration Query** screen appears.
4. In the **Feature Configuration Search** zone, enter **C1-BILLADJSQ** in the **Feature Name** field.

> **Note:** ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.

5. Click **Search**.
   A list of feature configurations that meet the search criteria appears in the search results.
6. In the **Search Results** section, click the link in the **Description** column corresponding to the feature configuration whose details you want to edit.

   The **Feature Configuration** screen appears. It contains the following option types:

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Option Type	Description	Mandatory (Yes or No)
Billable Charge SQI	Used to specify the service quantity identifier (SQI) which you want to use while creating a billable charge for the state assessment fee. **Note:** You must specify an SQI which is already defined in the system.	Yes (Conditional) **Note:** This data is required when you want to create billable charges for the state assessment fee.
Coverage End Date SQI	Used to specify the service quantity identifier (SQI) which you want use to derive the coverage end date from the account's last billed charge. The system uses the derived coverage end date in calculating the future retro adds (debits) for the respective account. **Note:** You must specify an SQI which is already defined in the system.	Yes
Premium Amount SQI	Used to specify the service quantity identifier (SQI) based on which you want to calculate the catch up premium for each eligible billable charge. The value derived is finally used to calculate the future retro adds (debits) for the respective account. **Note:** You must specify an SQI which is already defined in the system. The future retro adds (debits) appears in the **Billing and Adjustment Summary** zone of the **Account** tab on the **Customer 360° Information** screen.	Yes

7. Enter the values for the required option types in the **Feature Configuration** screen.
8. Click the **Save** button in the **Page Title** area.
   The changes made to the feature configuration are saved.

Related Topics

For more information on...	See...
Billing and Adjustment Summary zone	Billing and Adjustment Summary on page 627

Setting the C1_CMO Feature Configuration

The **C1_CMO** feature configuration enables the system to determine the following:

- Administrative contracts and excess credit transactions which should be listed in the **Customer 360° Information** screen
- Payments against the suspense, on account, and excess credit contracts which are eligible for partial payment transfer from the payment list

Prerequisites

To set the **C1_CMO** feature configuration, you should have:

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- Required contract types defined in the application

Procedure

To set the **C1_CMO** feature configuration:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **F** and then click **Feature Configuration**.
   A sub-menu appears.
3. Click the **Search** option from the **Feature Configuration** sub-menu.
   The **Feature Configuration Query** screen appears.
4. In the **Feature Configuration Search** zone, enter **C1_CMO** in the **Feature Name** field.

   Note: ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.
5. Click **Search**.
   A list of feature configurations that meet the search criteria appears in the search results.
6. In the **Search Results** section, click the link in the **Description** column corresponding to the feature configuration whose details you want to edit.

   The **Feature Configuration** screen appears. It contains the following option types:

Option Type	Description	Mandatory (Yes or No)
Administrative Contract Type	Used to specify the contract type. The contracts of the specified contract type are then listed in the **Administrative Contracts** zone of the **Account** tab on the **Customer 360° Information** screen. **Note:** If you want to specify multiple contract types, you need to set the **Administrative Contract Type** option type multiple times with a unique sequence number. If you do not specify the value for this option type, the data does not appear in the **Administrative Contracts** zone.	No
On Account Contract Type	Used to specify the contract type. The excess credit transactions on the contracts of the specified contract type are then listed in the **Billed Vs Paid** zone of the **Account** tab on the **Customer 360° Information** screen. It also helps the system to determine the payments against the on account contracts (created using the specified contract type) which are eligible for partial payment transfer from the payment list.	No

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Option Type	Description	Mandatory (Yes or No)
	Note: If you want to specify multiple contract types, you need to set the **On Account Contract Type** option type multiple times with a unique sequence number. If you do not specify the value for this option type, the data does not appear in the **Billed Vs Paid** zone.	
Excess Credit Contract Type	Used to specify the contract type. It helps the system to determine the payments against the excess credit contracts (created using the specified contract type) which are eligible for partial payment transfer from the payment list. Ideally, these excess credit contracts of the accounts should be used to park overpayments on the bills. **Note:** If you want to specify multiple contract types, you need to set the **Excess Credit Contract Type** option type multiple times with a unique sequence number.	No
Suspense Contract Type	Used to specify the contract type. It helps the system to determine the payments against the suspense contracts (created using the specified contract type) which are eligible for partial payment transfer from the payment list. **Note:** If you want to specify multiple contract types, you need to set the **Suspense Contract Type** option type multiple times with a unique sequence number.	No
Excluded Contract types for netting	Used when you want to exclude unmatched financial transactions of a particular contract type while creating transfer adjustments for a refund/write off request at the account level. **Note:** You can exclude multiple contract types by defining the **Excluded Contract types for netting** option type multiple times (with unique sequence number) in the feature configuration.	Yes (Conditional) **Note:** This data is required when the adjustment level in the refund/write off request is set to **Account** or **Bill**.

7. Enter the values for the required option types in the **Feature Configuration** screen.
8. Click the **Save** button in the **Page Title** area.
   The changes made to the feature configuration are saved.

Related Topics

For more information on...	See...
Administrative Contracts zone	Administrative Contracts on page 625
Billed Vs Paid zone	Billed Vs Paid on page 629
Partial Payment Transfer	Partial Payment Transfer

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Setting the C1_DIVFUNCT Feature Configuration

Procedure

To set the **C1_DIVFUNCT** feature configuration:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **F** and then click **Feature Configuration**.
   A sub-menu appears.
3. Click the **Search** option from the **Feature Configuration** sub-menu.
   The **Feature Configuration Query** screen appears.
4. In the **Feature Configuration Search** zone, enter **C1_DIVFUNCT** in the **Feature Name** field.

   Note: ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.
5. Click **Search**.
   A list of feature configurations that meet the search criteria appears in the search results.
6. In the **Search Results** section, click the link in the **Description** column corresponding to the feature configuration whose details you want to edit.

   The **Feature Configuration** screen appears. It contains the following option types:

Option Type	Description	Mandatory (Yes or No)
Enforce division-specific validations	Used to indicate whether the division-specific validations must be triggered on the **Person**, **Account** and **Contract** screens. The valid values are: • Y • N	Yes

7. Enter the values for the required option types in the **Feature Configuration** screen.
8. Click the **Save** button in the **Page Title** area.
   The changes made to the feature configuration are saved.

Setting the DELINPROC Feature Configuration

Procedure

To set the **DELINPROC** feature configuration:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **F** and then click **Feature Configuration**.
   A sub-menu appears.
3. Click the **Search** option from the **Feature Configuration** sub-menu.
   The **Feature Configuration Query** screen appears.
4. In the **Feature Configuration Search** zone, enter **DELINPROC** in the **Feature Name** field.

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Note: ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.

5. Click **Search**.
   A list of feature configurations that meet the search criteria appears in the search results.
6. In the **Search Results** section, click the link in the **Description** column corresponding to the feature configuration whose details you want to edit.

   The **Feature Configuration** screen appears. It contains the following option types:

Option Type	Description	Mandatory (Yes or No)
Delinquency Process Field Mapping	Used to specify a delinquency process preference which is created using the **Delinquency Process** preference category through the **Field Mapping** screen. The system then avails the attributes from the preference at various stages in the lifecycle of a delinquency process. **Note:** This option type is applicable for both the fully insured group and the fully insured individual businesses. For more information about the preference, refer to the Delinquency Process Preference section.	Yes (Conditional) **Note:** This data is required while defining a delinquency process preference.
Policy Characteristic Type for Customer Contact	Used to indicate the characteristic type using which you want to store the policy ID on the customer contact. Here, you must specify a characteristic type where the characteristic entity is set to **Customer Contact**. **Note:** This option type is referred in the **C1-NOTADREC** and **C1-NOTADCAN** algorithms attached to a customer class. It is required when the group customer wants to allocate advance deposit to settle its overdue bills through a delinquency process. It is only applicable for the fully insured group business.	Yes (Conditional) **Note:** This data is required while defining a delinquency process preference.
Routing Method - Contact Method Mapping	Used to specify a routing method - contact method mapping preference which is created using the **C1_BillRouteCntMethMap** business object through the **Field Mapping** screen. The system then derives the preferred contact method for the bill routing method from the routing method - contact method mapping preference while creating a customer contact for a person or an account during the delinquency management. **Note:** This option type is applicable for both the fully insured group and the fully insured individual businesses. For more information about the preference, refer to the Routing Method - Contact Method Mapping Preference section.	Yes (Conditional) **Note:** This data is required while defining a delinquency process preference.

7. Enter the values for the required option types in the **Feature Configuration** screen.
8. Click the **Save** button in the **Page Title** area.

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The changes made to the feature configuration are saved.

Setting the C1-EHRCONFIG Feature Configuration

The **C1-EHRCONFIG** feature configuration enables the system to determine the maximum number of levels that can be included in an entity hierarchy relationship. Accordingly, the system enables you to create hierarchy entities for upto one level less than the level specified in the **Maximum Hierarchy Level** option type of the **C1-EHRCONFIG** feature configuration. For example, if you set the **Maximum Hierarchy Level** option type to 5, the system allows you to create hierarchy entities for upto four levels (i.e. Level 1, Level 2, Level 3, and Level 4). The last level (i.e. Level 5) is reserved for a price item that you want to include in an entity hierarchy relationship. Therefore, you need to accordingly set the value as per the business requirements.

Procedure

To set the **C1-EHRCONFIG** feature configuration:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **F** and then click **Feature Configuration**.
   A sub-menu appears.
3. Click the **Search** option from the **Feature Configuration** sub-menu.
   The **Feature Configuration Query** screen appears.
4. In the **Feature Configuration Search** zone, enter **C1-EHRCONFIG** in the **Feature Name** field.

   Note: ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.
5. Click **Search**.
   A list of feature configurations that meet the search criteria appears in the search results.
6. In the **Search Results** section, click the link in the **Description** column corresponding to the feature configuration whose details you want to edit.

   The **Feature Configuration** screen appears. It contains the following option type:

Option Type	Description	Mandatory (Yes or No)
Maximum Hierarchy Level	Used to indicate the maximum number of levels that you want to include in an entity hierarchy relationship. **Note:** At present, the system supports maximum 10 levels in an entity hierarchy relationship. Therefore, you can define hierarchy entities for upto 9 levels. The last level (i.e. Level 10) is reserved for a price item that you want to include in an entity hierarchy relationship. By default, the value is set to 10. If you do not require 10 levels in an entity hierarchy relationship, you can set a lower maximum limit in this option type.	Yes

7. Enter the value for the required option type in the **Feature Configuration** screen.
8. Click the **Save** button in the **Page Title** area.
   The changes made to the feature configuration are saved.

Related Topics

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For more information on...	See...
How to define a hierarchy entity	Defining a Hierarchy Entity
How to edit a hierarchy entity	Editing a Hierarchy Entity
How to copy a hierarchy entity	Copying a Hierarchy Entity

Setting the C1_EXCHRATE Feature Configuration

Procedure

To set the **C1_EXCHRATE** feature configuration:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **F** and then click **Feature Configuration**.
   A sub-menu appears.
3. Click the **Search** option from the **Feature Configuration** sub-menu.
   The **Feature Configuration Query** screen appears.
4. In the **Feature Configuration Search** zone, enter **C1_EXCHRATE** in the **Feature Name** field.

   Note: ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.
5. Click **Search**.
   A list of feature configurations that meet the search criteria appears in the search results.
6. In the **Search Results** section, click the link in the **Description** column corresponding to the feature configuration whose details you want to edit.

   The **Feature Configuration** screen appears. It contains the following option types:

Option Type	Description	Mandatory (Yes or No)
End Date Required for Division Override	Used to indicate whether the end date is mandatory for a division-specific exchange rate. The valid values are: • Y • N By default, the value of this option type is set to **N**.	Yes

7. Enter the values for the required option types in the **Feature Configuration** screen.
8. Click the **Save** button in the **Page Title** area.
   The changes made to the feature configuration are saved.

Related Topics

For more information on...	See...
How to define an exchange rate	Defining an Exchange Rate
How to edit an exchange rate	Editing an Exchange Rate

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Setting the C1_EXP_OVRD Feature Configuration

Procedure

To set the **C1_EXP_OVRD** feature configuration:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **F** and then click **Feature Configuration**.
   A sub-menu appears.
3. Click the **Search** option from the **Feature Configuration** sub-menu.
   The **Feature Configuration Query** screen appears.
4. In the **Feature Configuration Search** zone, enter **C1_EXP_OVRD** in the **Feature Name** field.

   Note: ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.
5. Click **Search**.
   A list of feature configurations that meet the search criteria appears in the search results.
6. In the **Search Results** section, click the link in the **Description** column corresponding to the feature configuration whose details you want to edit.

   The **Feature Configuration** screen appears. It contains the following option types:

Option Type	Description	Mandatory (Yes or No)
Expire Override Switch	Used to indicate whether you want to automatically expire an agreed pricing when the agreed pricing of a person or an account without end date is overridden. The valid values are: • Y • N	Yes

7. Enter the values for the required option types in the **Feature Configuration** screen.
8. Click the **Save** button in the **Page Title** area.
   The changes made to the feature configuration are saved.

Setting the C1_FINTRANOP Feature Configuration

The **C1_FINTRANOP** feature configuration enables the system to determine various options which should be considered while creating billable charges, determining a price item pricing, generating bill segments, and while creating an actual bill using a trial bill.

Prerequisites

To set the **C1_FINTRANOP** feature configuration, you should have:

- Values defined for the **BIRC_OPT_TYP_FLG** lookup field

Procedure

To set the **C1_FINTRANOP** feature configuration:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **F** and then click **Feature Configuration**.

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A sub-menu appears.

3. Click the **Search** option from the **Feature Configuration** sub-menu.
   The **Feature Configuration Query** screen appears.
4. In the **Feature Configuration Search** zone, enter **C1_FINTRANOP** in the **Feature Name** field.

> **Note:** ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.

5. Click **Search**.
   A list of feature configurations that meet the search criteria appears in the search results.
6. In the **Search Results** section, click the link in the **Description** column corresponding to the feature configuration whose details you want to edit.

   The **Feature Configuration** screen appears. It contains the following option types:

Option Type	Description	Mandatory (Yes or No)
Account Financial History Details Switch	Used to indicate whether detailed or summarized information should be displayed for an account in the **Account Financial History** screen. The valid values are: • **Y** - Used when you want to list all financial transactions of a bill, payment, or adjustment for an account in the **Account Financial History** screen. • **N** - Used when you want to summarize all financial transactions of a particular type on an entity (i.e. bill, payment, or adjustment) and display the total amount in the **Account Financial History** screen. **Note:** If you do not specify the value for this option type, by default, it is set to **Y**.	No
Allow Advance Billing of Future Dated Charges	Used to indicate whether you want to use advance billing for future dated billable charges. The valid values are: • **Y** • **N** **Note:** If the **Allow Advance Billing of Future Dated Charges** option type is set to **Y**, the system considers those billable charges where the bill after date is on or before the cut-off date, irrespective whether the date of those billable charges is past or future dated. The **Allow Advance Billing of Future Dated Charges** option type should be defined only in case of non-recurring billable charges. By default, the value for this option type is set to **N**.	No
Allow Caching Of Rule Based Autopay List	Used to indicate whether you want to cache the rule based auto pay instructions of an account when the **C1-APRULEEVL** algorithm is invoked. The valid values are:	No

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Option Type	Description	Mandatory (Yes or No)
	• **Y** • **N** **Note:** If you do not specify the value for this option type, by default, it is set to **N**.	
Allow non-significant zero amount FT GL entry	Used to indicate whether you want to allow non-significant zero amount **FT GL** entries in the system. The valid values are: • **Y** • **N** **Note:** The **FT GL** amount is considered significant only when the statistical and total amount are non-zero.	Yes (Conditional) **Note:** This data is required when you want to allow non-significant zero amount **FT GL** entries in the system.
Avoid internal match event creation for zero dollar Bill	Used to indicate whether you want to consider a zero balance bill for offsetting against another bills in an offset request. The valid values are: • **Y** • **N** **Note:** If you set this option type to **Y**, the system does not match the credit and debit line items internally of a zero balance bill on the bill completion. If you set this option type to **N**, the system matches the credit and debit line items internally of a zero balance bill on the bill completion.	Yes (Conditional) **Note:** This data is required when you want to consider a zero balance bill for offsetting against another bills in an offset request.
Avoid Pricing Crawling if Rate Schedule present at Contract	Used to indicate that the system should not determine the price item pricing using the price assignment search algorithm (which is attached on the account's division) when the effective rate schedule is present on the contract. The valid values are: • **Y** • **N** **Note:** If you do not specify the value for this option type, by default, it is set to **N**.	No
Bill Segment Regeneration on Freeze	Used to indicate whether you want to regenerate the bill segments before freezing them. The valid values are: • **Y** • **N**	No

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Option Type	Description	Mandatory (Yes or No)
	Note: If you do not specify the value for this option type, by default, it is set to **N**. If the **Freeze and Complete** option is selected for the respective window period in the bill cycle and the **Bill Segment Regeneration on Freeze** option type is set to **Y**, then the bill segments are regenerated and the status of the bill segments is set to **Frozen**. However, if the **Freeze and Complete** option is not selected for the respective window period in the bill cycle, then the bill segments are always regenerated irrespective of whether the **Bill Segment Regeneration on Freeze** option type is set to **Y** or **N**.	
Billable Charges Date - Non Recurring	Used to indicate whether you want to consider the non-recurring billable charges whose start or end date is earlier than or equal to the cut-off date. The valid values are: • **S** - Used when you want to consider the non-recurring billable charges whose start date is earlier than or equal to the cut-off date. • **E** - Used when you want to consider the non-recurring billable charges whose end date is earlier than or equal to the cut-off date. **Note:** If you do not specify the value for this option type, by default, it is set to **S**. The system always considers the recurring billable charges whose start date is earlier than the cut-off date and end date is later than the cut-off date irrespective of whether the **Billable Charges Date** option type is set to **S** or **E**.	No
Billable Charges Date - Recurring	Used to indicate whether you want to consider the recurring billable charges whose start or end date is earlier than or equal to the cut-off date. The valid values are: • **S** - Used when you want to consider the recurring billable charges whose start date is earlier than or equal to the cut-off date. • **E** - Used when you want to consider the recurring billable charges whose end date is earlier than or equal to the cut-off date. **Note:** If you do not specify the value for this option type, by default, it is set to **S**.	No
Catch Up Flag For Recurring Charges	Used to indicate whether you want to consider the recurring billable charges for catch up. The valid values are:	Yes (Conditional)

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Option Type	Description	Mandatory (Yes or No)
	• **Y** - Used when you want to consider the recurring billable charges for catch up during the bill generation process, where the billable charge end date is earlier than the billable charge cut-off date. • **N** - Used when you do not want to consider the recurring billable charges for catch up during the bill generation process, where the billable charge end date is earlier than the billable charge cut-off date.	**Note:** This data is required when you want to catch up with the recurring billable charges before the bill generation process.
Defer Bill Segment Freeze	Used to indicate whether you want to defer the freezing process of bill segments until the bill routing and due date calculation is completed. The valid values are: • **Y** - Used when you want the system to freeze the bill segment after the bill routing and bill due date calculation is completed. • **N** - Used when you do not want the system to freeze the bill segment after the bill routing and bill due date calculation is completed. **Note:** This flag is only considered for freezing the bill once the bill's status is set to **Complete**.	Yes (Conditional) **Note:** This data is required when you want to defer the freezing process of bill segments until the bill routing and due date calculation is completed.
Hide Debt Class Details On Account Main Page	Used to indicate whether you want to hide the debt class details in the **Main** tab of the **Account** screen. The valid values are: • **Y** - Used when you want the system to hide the debt class details in the **Main** tab of the **Account** screen. • **N** - Used when you want the system to populate the debt class details in the **Main** tab of the **Account** screen.	Yes (Conditional) **Note:** This data is required when you want to hide the debt class details in the **Main** tab of the **Account** screen.
Rate Component Step Optimization	Used to indicate whether you want to determine the rate for all tiering ranges of a step tiered rate component or for only those tiering ranges of a step tiered rate component till when the quantity is exhausted. The valid values are: • **Y** - Used when you want to determine the rate for only those tiering ranges of a step tiered rate component till when the quantity is exhausted. It helps to improve the performance of the billing batches. If you set this option type to **Y**, always ensure that you define the price components with the tiering ranges in the ascending order. • **N** - Used when you want to determine the rate for all tiering ranges of a step tiered rate component. **Note:** If you do not specify the value for this option type, by default, it is set to **N**.	No
Refund/Write-Off Flush Counter	Used to specify the value for flush counter when the refund or write-off details are defined.	Yes (Conditional)

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Option Type	Description	Mandatory (Yes or No)
	Note: You must specify a numeric value greater than zero. If the total number of refund or write-off records are equal to the flush counter, the system then performs a flush and clear at session level.	**Note:** This data is required when you are defining the refund or write-off details in the system.
Skip Priceitem Contract Type Validation	Used to indicate whether you want to skip the price item's and billable charge's contract's contract type validation. The valid values are: • **Y** - Used when you want to create a billable charge for a price item on the contract which is created using a contract type to which the price item is not associated. • **N** - Used when you want to create a billable charge for a price item on the contract which is created using a contract type to which the price item is associated. **Note:** If you do not specify the value for this option type, by default, it is set to **N**.	No
Trial Bill Characteristics Conversion	Used to indicate whether you want to copy the trial bill's characteristics when an actual bill is created using a trial bill. The valid values are: • **Y** • **N** **Note:** If you do not specify the value for this option type, by default, it is set to **N**.	No

7. Enter the values for the required option types in the **Feature Configuration** screen.
8. Click the **Save** button in the **Page Title** area.
   The changes made to the feature configuration are saved.

Setting the C1_FM Feature Configuration

Procedure

To set the **C1_FM** feature configuration:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **F** and then click **Feature Configuration**.
   A sub-menu appears.
3. Click the **Search** option from the **Feature Configuration** sub-menu.
   The **Feature Configuration Query** screen appears.
4. In the **Feature Configuration Search** zone, enter **C1_FM** in the **Feature Name** field.

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Note: ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.

5. Click **Search**.
   A list of feature configurations that meet the search criteria appears in the search results.
6. In the **Search Results** section, click the link in the **Description** column corresponding to the feature configuration whose details you want to edit.

   The **Feature Configuration** screen appears. It contains the following option types:

Option Type	Description	Mandatory (Yes or No)
First Batch in Transaction Aggregation Cycle	Used to specify the first mandatory batch that you want to be executed in the transaction aggregation cycle. **Note:** At present, the system does not support any value other than **C1-TXNIP** for this option type.	Yes
Last Batch in Transaction Aggregation Cycle	Used to specify the last mandatory batch that you want to be executed in the transaction aggregation cycle. **Note:** At present, the system does not support any value other than **C1-TXNCU** for this option type.	Yes
Disaggregation - Price Assignment	Used to indicate whether the disaggregation request should be automatically created for a person or account when a price item is assigned to the person or account or the existing price item pricing assigned to the person or account is modified. The valid values are: • true • false **Note:** You can use this feature when an algorithm which is created using the **TXNDISAGGPRA** algorithm type is attached to the **Post-Processing** system event of the **C1_PRASGN_BO** business object.	No
Allow Duplicate Summary ID	Used to indicate whether the transaction legs can have duplicate summary ID while creating an aggregated billable charge using the **Service Quantity Calculation (C1-TXNSQ)** batch. The valid values are: • true • false	No

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Option Type	Description	Mandatory (Yes or No)
	Note: If you set this option type to **false**, the system does not create the aggregated billable charge when one or more transaction legs have the same summary ID. If you do not specify the value for this option type, by default, the value is set to **false**.	
Parallel Query Degree	Used to specify the degree of parallelism that you want to use while creating chunks (i.e. work units) in various Transaction Feed Management (TFM) batches. The valid values are: • 1 • 2 • 3 • 4 • 5 • 6 • 7	No
	Note: With the parallel query feature, multiple threads on the database can work together simultaneously to process a single SQL statement which is used to create chunks. This helps to improve the batch performance. The system calculates the number of threads on the database that can be used to execute the SQL statement by setting 2 to the power of the specified parallel query degree. For example, if you set the parallel query degree to 4, the system uses 16 (i.e. 2^4) threads on the database to create work units. You must set the parallel query degree depending on the infrastructure available on the site. If you do not specify the value for this option type, by default, the parallel query degree is set to **2**.	
Price Item Determination Batch Description	Used to specify the description for the batch which is used for validating the transaction and deriving the price item in the transaction aggregation cycle. For example, **Validate Transaction and Derive Price Item**. This description appears in the error message when the transaction aggregation batches are not executed in the specified sequence.	Yes
Remove Duplicates from Accumulated Rule Output	Used to indicate whether duplicate transaction legs must be created during the transaction aggregation cycle through the rule output accumulation process. The valid values are: • true • false	No

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Option Type	Description	Mandatory (Yes or No)
	Note: If you do not specify the value for this option type, by default, the value is set to **false**.	
Rule Output Accumulation	Used to indicate whether the system should accumulate the output parameters of all rules where the criteria returns **Rule Is True** irrespective of whether the rule true action is set to **Next Dependent**, **Next Rule by Priority**, or **Success** and then create transaction legs using the accumulated output parameters. The valid values are: • true • false **Note:** If you do not specify the value for this option type, by default, the value is set to **false**.	No
Show Default Values in Price Item Pricing	Used to indicate whether the default values must appear in the **Ignore Transaction**, **Aggregate Transaction**, and **Aggregation Schedule** fields while defining the price item pricing. The valid values are: • Y • N	Yes
Use Materialized Views	Used to indicate whether the price item pricing information must be cached in the **CI_PRC_AGRD**, **CI_PRC_PL**, and **CI_PRC_INH_PL** tables. The valid values are: • true • false	Yes
Maximum Price Item Parameters Cache Size	Used to indicate the maximum number of price items whose parameter information can be cached in the memory.	Yes
Maximum Price Item Parameter Groups Cache Size	Used to indicate the maximum number of price item parameter groups whose information can be cached in the memory.	Yes
SQ Recalculation Required	Used to indicate whether the SQIs in an aggregated billable charge must be recalculated while executing the **C1-TXNCU** batch. The valid values are: • Y • N **Note:** If you do not specify the value for this option type or if you set the value to **N**, the system will not recalculate the SQIs in an aggregated billable charge.	No
Transaction Detail Account Validation	Used to indicate whether the account must be validated during the transaction validation process. The valid values are: • Y • N	No

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Option Type	Description	Mandatory (Yes or No)
	Note: If you set this option type to **N**, the system overrides the transaction's account identifier type, account identifier, and division with the first derived account's account identifier type, account identifier, and division, respectively. If you do not specify the value for this option type, the system will validate the account during the transaction validation process.	
Populate Summary Table Batch Description	Used to specify the description for the batch which is used for adding a summary record in the **CI_TXN_DTL_PRITM_SUMMARY** table. For example, **Populate CI_TXN_DTL_PRITM_SUMMARY Table**. This description appears in the error message when the transaction aggregation batches are not executed in the specified sequence.	Yes (Conditional) **Note:** This data is required when the **Use C1-TXNPS During Transaction Aggregation** option type is set to **true**.
Find Price Item Pricing Batch Description	Used to specify the description for the batch which is used for finding the price item pricing for transactions in the transaction aggregation cycle. For example, **Price Item Pricing Verification**. This description appears in the error message when the transaction aggregation batches are not executed in the specified sequence.	Yes
Update Transaction Status Batch Description	Used to specify the description for the batch which is used for updating the status of the transactions (for which the error has occurred) in the transaction aggregation cycle. For example, **Update Status**. This description appears in the error message when the transaction aggregation batches are not executed in the specified sequence.	Yes
Service Quantity Calculation Batch Description	Used to specify the description for the batch which is used for creating the billable charges for transactions in the transaction aggregation cycle. For example, **Service Quantity Calculation**. This description appears in the error message when the transaction aggregation batches are not executed in the specified sequence.	Yes
Transaction Completion Batch Description	Used to specify the description for the batch which is used for updating the status of the transactions in the transaction aggregation cycle. For example, **Mark Completion**. This description appears in the error message when the transaction aggregation batches are not executed in the specified sequence.	Yes
Cleanup Unwanted Data Batch Description	Used to specify the description for the batch which is used for updating or deleting billable charges created for transactions in the transaction aggregation cycle. For example, **Clean Up**. This description appears in the error message when the transaction aggregation batches are not executed in the specified sequence.	Yes

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Option Type	Description	Mandatory (Yes or No)
Use C1-TXNPS During Transaction Aggregation	Used to indicate whether you want to use an alternative transaction aggregation process when the aggregation ratio is low. The valid values are: • true • false	No
	Note: If you set this option type to **true**, you need to execute the following batches in the specified order in the transaction aggregation cycle: **a.** Flush All Caches (F1-FLUSH) **b.** Refresh Pricing (C1-TXNRP) **c.** Header Validation (C1-TXNHV) **d.** Validate Transaction and Derive Price Item (C1-TXNIP) **e.** Populate CI_TXN_DTL_PRITM_SUMMARY Table (C1-TXNPS) **f.** Price Item Pricing Verification (C1-TXNVP) **g.** Update Status (C1-TXNEX) **h.** Service Quantity Calculation (C1-TXNSQ) **i.** Mark Completion (C1-TXNCM) **j.** Clean Up (C1-TXNCU) with the **Request Type** parameter set to **EROR**	

7. Enter the values for the required option types in the **Feature Configuration** screen.
8. Click the **Save** button in the **Page Title** area.
   The changes made to the feature configuration are saved.

Setting the C1-OFFSETREQ Feature Configuration

The **C1-OFFSETREQ** feature configuration enables the system to determine whether the completed debit or credit bills of the effective child persons of the main customer (whose bill is added as the primary bill in the offset request) should be listed when you search for a bill in the offset request.

Procedure

To set the **C1-OFFSETREQ** feature configuration:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **F** and then click **Feature Configuration**.
   A sub-menu appears.
3. Click the **Search** option from the **Feature Configuration** sub-menu.
   The **Feature Configuration Query** screen appears.
4. In the **Feature Configuration Search** zone, enter **C1-OFFSETREQ** in the **Feature Name** field.

> **Note:** ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.

5. Click **Search**.
   A list of feature configurations that meet the search criteria appears in the search results.

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6. In the **Search Results** section, click the link in the **Description** column corresponding to the feature configuration whose details you want to edit.

   The **Feature Configuration** screen appears. It contains the following option type:

Option Type	Description	Mandatory (Yes or No)
Allow Offsetting Across Persons	Used to indicate whether you want to offset bills across main customer's hierarchy. The valid values are: • **Y** - Used when you want to offset one or more bills of the main customer against one or more bills of the same or other accounts of the main customer or against one or more bills of the accounts of its effective child persons. • **N** - Used when you want to offset one or more bills of the main customer against one or more bills of the same or other accounts of the main customer.	Yes
Show Warning When Offsetting Across Person Hierarchy	Used to indicate whether the system should display a warning message when a bill added for offsetting is in different person hierarchy than the base bill person hierarchy. The valid values are: • **Y** - Used when you want the system to display a warning message when a bill is added for offset • **N** **Note:** If you do not specify the value for this option type, by default, it is set to **N**.	Yes (Conditional) **Note:** This data is required when the **Allow Offsetting Across Person** option type is set to **Y**.

7. Enter the value for the required option type in the **Feature Configuration** screen.
8. Click the **Save** button in the **Page Title** area.
   The changes made to the feature configuration are saved.

Related Topics

For more information on...	See...
How to add a debit or credit bill to an offset request	Adding a Debit or Credit Bill to an Offset Request on page 1640

Setting the C1-PAYPORTAL Feature Configuration

Procedure

To set the **C1-PAYPORTAL** feature configuration:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **F** and then click **Feature Configuration**.
   A sub-menu appears.
3. Click the **Search** option from the **Feature Configuration** sub-menu.
   The **Feature Configuration Query** screen appears.
4. In the **Feature Configuration Search** zone, enter **C1-PAYPORTAL** in the **Feature Name** field.

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Note: ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.

5. Click **Search**.
   A list of feature configurations that meet the search criteria appears in the search results.
6. In the **Search Results** section, click the link in the **Description** column corresponding to the feature configuration whose details you want to edit.

   The **Feature Configuration** screen appears. It contains the following option types:

Option Type	Description	Mandatory (Yes or No)
Allow Overpayment	Used to indicate whether you want to allow overpayment against an entity while editing the payment amount. The valid values are: • true • false	Yes
FK Reference for Bill	Used to indicate the foreign key reference which generates the information string for a bill in the **Edit Payment Amount** screen. **Note:** The C1-BLACT foreign key reference for bill is shipped with the product. You can also create a custom foreign key reference, if required.	Yes
FK Reference for Bill Segment	Used to indicate the foreign key reference which generates the information string for a bill segment in the **Edit Payment Amount** screen. **Note:** The C1-BSEG foreign key reference for bill segment is shipped with the product. You can also create a custom foreign key reference, if required.	Yes
FK Reference for Contract	Used to indicate the foreign key reference which generates the information string for a contract in the **Edit Payment Amount** screen. **Note:** The C1_F_SA foreign key reference for contract is shipped with the product. You can also create a custom foreign key reference, if required.	Yes
FK Reference for Settlement	Used to indicate the foreign key reference which generates the information string for a settlement ID in the **Edit Payment Amount** screen. **Note:** At present, no foreign key reference for settlement ID is shipped with the product. Only the settlement ID appears in the information string. You can create a foreign key reference for settlement ID and specify it in this field.	No

7. Enter the values for the required option types in the **Feature Configuration** screen.
8. Click the **Save** button in the **Page Title** area.
   The changes made to the feature configuration are saved.

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Related Topics

For more information on...	See...
How to edit the payment amount against each entity	Editing the Payment Amount on page 1518

Setting the C1_PER_REL Feature Configuration

You can define person to person relationship type sequence in the **C1_PER_REL** feature configuration. This sequence is used while searching for effective price item pricing at the parent customer level.

Procedure

To set the **C1_PER_REL** feature configuration:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **F** and then click **Feature Configuration**.
   A sub-menu appears.
3. Click the **Search** option from the **Feature Configuration** sub-menu.
   The **Feature Configuration Query** screen appears.
4. In the **Feature Configuration Search** zone, enter **C1_PER_REL** in the **Feature Name** field.

   Note: ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.
5. Click **Search**.
   A list of feature configurations that meet the search criteria appears in the search results.
6. In the **Search Results** section, click the link in the **Description** column corresponding to the feature configuration whose details you want to edit.

   The **Feature Configuration** screen appears. It contains the following option types:

Option Type	Description	Mandatory (Yes or No)
Person to Person Relationship Type	Used to indicate the person to person relationship type. **Note:** If you want to define more than one relationship type in the feature configuration, you need to specify the sequence in which the relationship type should be considered while searching effective price item pricing at the parent customer level.	Yes

7. Enter the values for the required option types in the **Feature Configuration** screen.
8. Click the **Save** button in the **Page Title** area.
   The changes made to the feature configuration are saved.

Related Topics

For more information on...	See...
Person to Person Relationship Type Sequence screen	Person to Person Relationship Type Sequence

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Setting the C1_PERSTYPE Feature Configuration

The **C1_PERSTYPE** feature configuration enables the system to determine whether the entities should be created directly or through a customer registration object whenever a health care inbound message is processed. If the person type specified in the health care inbound message matches the person type specified in the **Bill Group Person Type** , **Parent Person Type**, or **TPA Person Type** option type of the **C1_PERSTYPE** feature configuration, the system creates or updates the person, account, policy, policy plan, and address through a customer registration object. Note that the memberships, pass-through billable charges, and pricing rules are created directly and not via customer registration object. However, if the person type specified in the health care inbound message does not match the person type specified in the **Bill Group Person Type**, **Parent Person Type**, or **TPA Person Type** option type, the system creates or updates the person and its other entities directly and not through a customer registration object.

Prerequisites

To set the **C1_PERSTYPE** feature configuration, you should have:

- Values defined for the **PER_OR_BUS_FLG** lookup field

Procedure

To set the **C1_PERSTYPE** feature configuration:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **F** and then click **Feature Configuration**.
   A sub-menu appears.
3. Click the **Search** option from the **Feature Configuration** sub-menu.
   The **Feature Configuration Query** screen appears.
4. In the **Feature Configuration Search** zone, enter **C1_PERSTYPE** in the **Feature Name** field.

   Note: ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.
5. Click **Search**.
   A list of feature configurations that meet the search criteria appears in the search results.
6. In the **Search Results** section, click the link in the **Description** column corresponding to the feature configuration whose details you want to edit.

   The **Feature Configuration** screen appears. It contains the following option types:

Option Type	**Description**	**Mandatory (Yes or No)**
Bill Group Person Type	Used to specify the person type which indicates that the person is a bill group.	Yes (Conditional)
	Note: You must specify a value which is already defined in the **PER_OR_BUS_FLG** lookup field. It must be in the **Active** status.	**Note:** This data is required while creating a bill group through a health care inbound message.
Parent Person Type	Used to specify the person type which indicates that the person is a parent customer.	Yes (Conditional)

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Option Type	Description	Mandatory (Yes or No)
	Note: You must specify a value which is already defined in the **PER_OR_BUS_FLG** lookup field. It must be in the **Active** status.	**Note:** This data is required while creating a parent customer through a health care inbound message.
TPA Person Type	Used to specify the person type which indicates that the person is a third party administrator.	Yes (Conditional)
	Note: You must specify a value which is already defined in the **PER_OR_BUS_FLG** lookup field. It must be in the **Active** status.	**Note:** This data is required while creating a TPA person through a health care inbound message.

7. Enter the values for the required option types in the **Feature Configuration** screen.
8. Click the **Save** button in the **Page Title** area.
   The changes made to the feature configuration are saved.

Related Topics

For more information on...	See...
Health Care Inbound Message	Health Care Inbound Message on page 2274

Setting the C1_PPARM_FLG Feature Configuration

The **C1_PPARM_FLG** feature configuration enables the system to determine whether the multi parameter based pricing or variance parameter based pricing feature is enabled. For more information on how to define pricing for a price item or price item bundle based on multiple parameters, see Multi Parameter Based Pricing. For more information on how to define pricing for a price item or price item bundle based on variance parameter, see Variance Parameter Based Pricing.

Procedure

To set the **C1_PPARM_FLG** feature configuration:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **F** and then click **Feature Configuration**.
   A sub-menu appears.
3. Click the **Search** option from the **Feature Configuration** sub-menu.
   The **Feature Configuration Query** screen appears.
4. In the **Feature Configuration Search** zone, enter **C1_PPARM_FLG** in the **Feature Name** field.

   Note: ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.

5. Click **Search**.
   A list of feature configurations that meet the search criteria appears in the search results.
6. In the **Search Results** section, click the link in the **Description** column corresponding to the feature configuration whose details you want to edit.

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The **Feature Configuration** screen appears. It contains the following option type:

Option Type	Description	Mandatory (Yes or No)
Multi Price Parameter	Used to indicate whether you want to enable the multi parameter or variance parameter based pricing feature. The valid values are: • **True** - Used when you want to enable the multi parameter based pricing feature. • **False** - Used when you want to enable the variance parameter based pricing feature.	Yes

7. Enter the value for the required option type in the **Feature Configuration** screen.
8. Click the **Save** button in the **Page Title** area.
   The changes made to the feature configuration are saved.

Setting the C1_PR_REC Feature Configuration

Procedure

To set the **C1_PR_REC** feature configuration:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **F** and then click **Feature Configuration**.
   A sub-menu appears.
3. Click the **Search** option from the **Feature Configuration** sub-menu.
   The **Feature Configuration Query** screen appears.
4. In the **Feature Configuration Search** zone, enter **C1_PR_REC** in the **Feature Name** field.

> **Note:** ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.

5. Click **Search**.
   A list of feature configurations that meet the search criteria appears in the search results.
6. In the **Search Results** section, click the link in the **Description** column corresponding to the feature configuration whose details you want to edit.

   The **Feature Configuration** screen appears. It contains the following option type:

Option Type	Description	Mandatory (Yes or No)
Effective Pricing Record Set Limit	Used to specify the number of records that can be displayed in the **Search Results** section of the **Effective Price Assignment** zone. The value must be an integer and not in decimals. The maximum number of records that can be displayed are 5000. **Note:** If you enter the value as **0** or if you do not specify the value for the **Effective Pricing RecordSet Limit** option type, no records will be displayed in the **Search Results** section.	Yes

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7. Enter the values for the required option types in the **Feature Configuration** screen.
8. Click the **Save** button in the **Page Title** area.
   The changes made to the feature configuration are saved.

Related Topics

For more information on...	See...
Effective Price Assignment zone in the **Pricing (Account)** screen	Effective Price Assignments for Account
Effective Price Assignment zone in the **Pricing (Person)** screen	Effective Price Assignments for Person

Setting the C1_PRASNORDR Feature Configuration

The **C1_PRASNORDR** feature configuration enables the system to determine the manner in which price assignments should be searched for a global customer. For more information on how effective price item pricing is derived, see Price Assignment Search Mechanism.

Prerequisites

To set the **C1_PRASNORDR** feature configuration, you should have:

- An algorithm defined using the **C1_PRASN_PP** algorithm type in the application

Procedure

To set the **C1_PRASNORDR** feature configuration:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **F** and then click **Feature Configuration**.
   A sub-menu appears.
3. Click the **Search** option from the **Feature Configuration** sub-menu.
   The **Feature Configuration Query** screen appears.
4. In the **Feature Configuration Search** zone, enter **C1_PRASNORDR** in the **Feature Name** field.

   Note: ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.

5. Click **Search**.
   A list of feature configurations that meet the search criteria appears in the search results.
6. In the **Search Results** section, click the link in the **Description** column corresponding to the feature configuration whose details you want to edit.

   The **Feature Configuration** screen appears. It contains the following option type:

Option Type	Description	Mandatory (Yes or No)
Price Assignment Algorithm	Used to specify the algorithm using which the price assignment should be searched for a global customer. **Note:** You must specify an algorithm which is already defined in the system.	Yes

7. Enter the value for the required option type in the **Feature Configuration** screen.

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8. Click the **Save** button in the **Page Title** area.
   The changes made to the feature configuration are saved.

Related Topics

For more information on...	See...
Pricing (Person) screen	Pricing (Person)

Setting the C1_PRICING Feature Configuration

The **C1_PRICING** feature configuration enables the system to determine the following:

- The contract type that should be associated with a price item or price item bundle which is available for pricing.
- The priority that should be defaulted while assigning a price list to a person or an account from the user interface or through a business service.
- Whether the logs should be maintained when the **C1-GetAllAssignedPriceLists**, **C1-AssignPriceList**, **C1-GetEffectivePricing**, **C1-GetAccountRate**, **C1_PRICEASSIGN_SERVICE**, **C1-PriceAccount**, and **C1-GetPricing** business services are invoked.

Prerequisites

To set the **C1_PRICING** feature configuration, you should have:

- Contract types defined in the application

Procedure

To set the **C1_PRICING** feature configuration:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **F** and then click **Feature Configuration**.
   A sub-menu appears.
3. Click the **Search** option from the **Feature Configuration** sub-menu.
   The **Feature Configuration Query** screen appears.
4. In the **Feature Configuration Search** zone, enter **C1_PRICING** in the **Feature Name** field.

   Note: ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.

5. Click **Search**.
   A list of feature configurations that meet the search criteria appears in the search results.
6. In the **Search Results** section, click the link in the **Description** column corresponding to the feature configuration whose details you want to edit.

   The **Feature Configuration** screen appears. It contains the following option types:

Option Type	Description	Mandatory (Yes or No)
Default Contract Type	Used to indicate the contract type that you want to associate with a price item or price item bundle which is available for pricing. **Note:** You must specify a contract type which is already defined in the system. You must ensure that the specified contract type is defined for all divisions in the system.	Yes

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Option Type	Description	Mandatory (Yes or No)
Default Price List Priority	Used to indicate the default priority that should appear in the **Price List Assignment** screen when you assign a price list to a person or an account. You can then edit the priority, if required. It is also used when both the priority and priority indicator are not passed to the **C1-AssignPriceList** business service. **Note:** The value for this option type must be a positive integer.	No
Enable Service Logging	Used to indicate whether you want to maintain logs when the **C1-GetAllAssignedPriceLists**, **C1-AssignPriceList**, **C1-GetEffectivePricing**, **C1-GetAccountRate**, **C1_PRICEASSIGN_SERVICE**, **C1-PriceAccount**, and **C1-GetPricing**business services are invoked. The valid values are: • True • False	No

7. Enter the values for the required option types in the **Feature Configuration** screen.
8. Click the **Save** button in the **Page Title** area.
   The changes made to the feature configuration are saved.

Related Topics

For more information on...	See...
How to define a price item or price item bundle	Defining a Price Item or Price Item Bundle on page 782
How to edit a price item or price item bundle	Editing a Price Item or Price Item Bundle on page 829
How to copy a price item or price item bundle	Copying a Price Item or Price Item Bundle on page 811
How to assign a price list to a person	Assigning a Price List to a Person on page 898
How to assign a price list to an account	Assigning a Price List to an Account on page 895
How to assign a price list to one or more eligible persons	Assigning a Price List to One or More Eligible Persons on page 914
How to assign a price list to one or more eligible accounts	Assigning a Price List to One or More Eligible Accounts on page 912

Setting the C1-PYREQSRT Feature Configuration

Procedure

To set the **C1-PYREQSRT** feature configuration:

1. Click the **Admin** link in the **Application** toolbar.

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A list appears.

2. From the **Admin** menu, select **F** and then click **Feature Configuration**.
   A sub-menu appears.
3. Click the **Search** option from the **Feature Configuration** sub-menu.
   The **Feature Configuration Query** screen appears.
4. In the **Feature Configuration Search** zone, enter **C1-PYREQSRT** in the **Feature Name** field.

> **Note:** ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.

5. Click **Search**.
   A list of feature configurations that meet the search criteria appears in the search results.
6. In the **Search Results** section, click the link in the **Description** column corresponding to the feature configuration whose details you want to edit.

   The **Feature Configuration** screen appears. It contains the following option types:

Option Type	Description	Mandatory (Yes or No)
Bill	Used to sort columns by the selected option type. The table fields in CI_BILL table are used to set the values for the option type **Bill** . It also enables sorting by order. Its valid values are: • Ascending • Descending	No
Bill Segment	Used to sort columns by the selected option type. The table fields in CI_BSEG table are used to set the values for the option type **Bill Segment** . It also enables sorting by order. Its valid values are: • Ascending • Descending	No
Contract	Used to sort columns by the selected option type. The table fields in CI_SA table are used to set the values for the option type **Contract** . It also enables sorting by order. Its valid values are: • Ascending • Descending	No

> **Note:** Above options types are configured for the **Sort By** field for sorting columns on the **Edit Payment Amount** screen.

7. Enter the values for the required option types in the **Feature Configuration** screen.
8. Click the **Save** button in the **Page Title** area.
   The changes made to the feature configuration are saved.

Setting the C1_RLENG Feature Configuration

Procedure

To set the **C1_RLENG** feature configuration:

1. Click the **Admin** link in the **Application** toolbar.

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A list appears.

2. From the **Admin** menu, select **F** and then click **Feature Configuration**.
   A sub-menu appears.
3. Click the **Search** option from the **Feature Configuration** sub-menu.
   The **Feature Configuration Query** screen appears.
4. In the **Feature Configuration Search** zone, enter **C1_RLENG** in the **Feature Name** field.

> **Note:** ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.

5. Click **Search**.
   A list of feature configurations that meet the search criteria appears in the search results.
6. In the **Search Results** section, click the link in the **Description** column corresponding to the feature configuration whose details you want to edit.

   The **Feature Configuration** screen appears. It contains the following option types:

Option Type	Description	Mandatory (Yes or No)
Logging Rules for Transaction Feed	Used to indicate whether a log should be generated when you execute the **Transaction Validation and Initial Product Determination (C1-TXNIP)** batch. The valid values are: • True • False **Note:** This log indicates the rules that were executed for each transaction and whether each rule passed or failed during the execution.	Yes
Maximum Number of Rules in Cache	Used to indicate the maximum number of rules whose entry should be created in the log file.	Yes

7. Enter the values for the required option types in the **Feature Configuration** screen.
8. Click the **Save** button in the **Page Title** area.
   The changes made to the feature configuration are saved.

Related Topics

For more information on...	See...
Transaction Feed Management	Transaction Feed Management on page 1131

Setting the C1-TXNDMYID Feature Configuration

For manually added transactions, the system can generate header details including the header ID automatically if you set the option types in the **C1-TXNDMYID** feature configuration.

Procedure

To set the **C1-TXNDMYID** feature configuration:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.

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2. From the **Admin** menu, select **F** and then click **Feature Configuration**.
   A sub-menu appears.
3. Click the **Search** option from the **Feature Configuration** sub-menu.
   The **Feature Configuration Query** screen appears.
4. In the **Feature Configuration Search** zone, enter **C1-TXNDMYID** in the **Feature Name** field.

   Note: ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.
5. Click **Search**.
   A list of feature configurations that meet the search criteria appears in the search results.
6. In the **Search Results** section, click the link in the **Description** column corresponding to the feature configuration whose details you want to edit.

   The **Feature Configuration** screen appears. It contains the following option types:

Option Type	Description	Mandatory (Yes or No)
Dummy File Name	Used to specify the dummy file name.	Yes
Dummy Header ID	Used to specify the dummy header ID.	Yes
Dummy Transaction Source	Used to specify the dummy transaction source.	Yes
Dummy Header Date	Used to specify the dummy header date.	Yes

7. Enter the values for the required option types in the **Feature Configuration** screen.
8. Click the **Save** button in the **Page Title** area.
   The changes made to the feature configuration are saved.

Related Topics

For more information on...	See...
Transaction Feed Management	Transaction Feed Management on page 1131

Setting the C1-HOLDSRCH Feature Configuration

The **C1-HOLDSRCH** feature configuration enables you to set certain feature-specific options which are used while creating or viewing a hold request in the system.

Prerequisites

To set the **C1-HOLDSRCH** feature configuration, you should have:

- Foreign key references defined for different entities, such as person, account, and bill
- Required hold request types defined in the application

Procedure

To set the **C1-HOLDSRCH** feature configuration:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **F** and then click **Feature Configuration**.
   A sub-menu appears.
3. Click the **Search** option from the **Feature Configuration** sub-menu.
   The **Feature Configuration Query** screen appears.

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4. In the **Feature Configuration Search** zone, enter **C1-HOLDSRCH** in the **Feature Name** field.

   Note: ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.

5. Click **Search**.
   A list of feature configurations that meet the search criteria appears in the search results.
6. In the **Search Results** section, click the link in the **Description** column corresponding to the feature configuration whose details you want to edit.

   The **Feature Configuration** screen appears. It contains the following option types:

Option Type	Description	Mandatory (Yes or No)
Account FK Ref	Used to indicate the foreign key reference for account. The system then generates information string for the account using the specified foreign key reference and accordingly displays it in the **Hold Request** screen. **Note:** You must specify a foreign key reference which is already defined in the system. The **ACCT** foreign key reference for account is shipped with the product. You can also use a custom foreign key reference, if required.	Yes
Bill FK Ref	Used to indicate the foreign key reference for bill. The system then generates information string for the bill using the specified foreign key reference and accordingly displays it in the **Hold Request** screen. **Note:** You must specify a foreign key reference which is already defined in the system. The **C1-BILL** foreign key reference for bill is shipped with the product. You can also use a custom foreign key reference, if required.	Yes
Default Hold Request Type for IWS	Used to indicate the hold request type using which you want to create a hold request through an inbound web service. The system uses the specified hold request type when it is not received in the inbound request. **Note:** You must specify a hold request type which is already defined in the system. Here, you must specify an active hold request type where the approval process is not configured for activation and release.	Yes

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Option Type	Description	Mandatory (Yes or No)
Funding Exclusion Reason	Used to indicate the reason why the bill record was excluded from the funding request. The system stamps this reason corresponding to the bill record when you create a hold request for a bill via the **Funding Request** screen.	Yes
Person FK Ref	Used to indicate the foreign key reference for person. The system then generates information string for the person using the specified foreign key reference and accordingly displays it in the **Hold Request** screen. **Note:** You must specify a foreign key reference which is already defined in the system. The **PERS** foreign key reference for person is shipped with the product. You can also use a custom foreign key reference, if required.	Yes

7. Enter the values for the required option types in the **Feature Configuration** screen.
8. Click the **Save** button in the **Page Title** area.
   The changes made to the feature configuration are saved.

Setting the C1_REFWO Feature Configuration

The **C1_REFWO** feature configuration enables the system to determine the following:

- How the refund/write off adjustment should be created for a refund/write off request when the adjustment level is not specified while defining the refund/write off request.
- Automatic refund/write off preference for the fully-insured group and individual lines of business.

Note: If the system is used for both the fully insured group and individual lines of business, you need to define two separate preferences with the **Automatic Refund/Write-Off** preference category – one for each line of business (i.e., fully insured group business and fully insured individual business).

Procedure

To set the **C1_REFWO** feature configuration:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **F** and then click **Feature Configuration**.
   A sub-menu appears.
3. Click the **Search** option from the **Feature Configuration** sub-menu.
   The **Feature Configuration Query** screen appears.
4. In the **Feature Configuration Search** zone, enter **C1_REFWO** in the **Feature Name** field.

   Note: ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.
5. Click **Search**.
   A list of feature configurations that meet the search criteria appears in the search results.

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6. In the **Search Results** section, click the link in the **Description** column corresponding to the feature configuration whose details you want to edit.

   The **Feature Configuration** screen appears. It contains the following option types:

Option Type	Description	Mandatory (Yes or No)
Default Adjustment Level	Used to control how the refund/write off adjustment should be created for the refund/write off request. The system considers this option type in the following scenarios: • When the value is not specified in the **Adjustment Level** field while defining a refund/write off request. • When the **Adjustment Level For Credit Bill** parameter is not defined in the **C1-IMREFCRET** algorithm attached to the respective account's division. The valid values are: • **ACCT** – Used when you want to create the refund/write off request at the account level. Here, the refund/write off adjustment is created against the netting contract of the account. • **BILL** – Used when you want to create the refund/write off request for a bill. Here, the refund/write off adjustment is created against the netting contract of the account. This option is only applicable for the financial services domain. • **SEGT** – Used when you want to create the refund/write off request for a bill, bill segment, adjustment, or payment of an account. Here, the refund/write off adjustment is created against the bill segment, adjustment, or payment segment, respectively. If you select this option, the system behaves in the traditional manner.	Yes (Conditional) **Note:** This data is required when you want to do the following: • Create refund/ write off request manually • Enable the automatic refund process for the account
Field Mapping Preference for Individual Membership	Used to indicate the automatic refund/write off preference that you want to use for the fully insured individual business. The system considers the various attributes of the automatic refund/ write off preference for: • Automatic Refund/Write Off Creation on Terminating an Individual Membership • Automatic Refund/Write Off Rollback on Reinstating an Individual Membership **Note:** You must specify a preference where the preference category is set to **Automatic Refund/ Write-Off**. This option type is only applicable for the health insurance domain and not for the financial services domain.	Yes (Conditional) **Note:** This data is required when you want to enable the automatic refund/ write off creation feature for the fully insured individual business.
Field Mapping Preference for Policy (Small Group)	Used to indicate the automatic refund/write off preference that you want to use for the fully insured group business. The system	Yes (Conditional)

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Option Type	Description	Mandatory (Yes or No)
	considers the various attributes of the automatic refund/write off preference for: • Automatic Refund/Write Off Creation on Terminating a Group Policy • Automatic Refund/Write Off Rollback on Reinstating a Group Policy	**Note:** This data is required when you want to enable the automatic refund/ write off creation feature for the fully insured group business.
	Note: You must specify a preference where the preference category is set to **Automatic Refund/ Write-Off**. This option type is only applicable for the health insurance domain and not for the financial services domain.	

7. Enter the values for the required option types in the **Feature Configuration** screen.
8. Click the **Save** button in the **Page Title** area.
   The changes made to the feature configuration are saved.

Setting the C1-PAYFLUPLD Feature Configuration

Procedure

To set the **C1-PAYFLUPLD** feature configuration:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **F** and then click **Feature Configuration**.
   A sub-menu appears.
3. Click the **Search** option from the **Feature Configuration** sub-menu.
   The **Feature Configuration Query** screen appears.
4. In the **Feature Configuration Search** zone, enter **C1-PAYFLUPLD** in the **Feature Name** field.

Note: ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.

5. Click **Search**.
   A list of feature configurations that meet the search criteria appears in the search results.
6. In the **Search Results** section, click the link in the **Description** column corresponding to the feature configuration whose details you want to edit.

   The **Feature Configuration** screen appears. It contains the following option types:

Option Type	Description	Mandatory (Yes or No)
Field Mapping for Match Type	Used to specify a field mapping which is created using the **Configuration for Match Type - Handling Overpayment** preference category.	Yes

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Option Type	Description	Mandatory (Yes or No)
	Note: The system then considers this field mapping during the step-three PUPL batch execution whenever there are multiple payment records of the payee account in the CSV file. By default, the value is set to **MT_CNF**. You can change the value, if required. This option type is only applicable for the health insurance domain.	
Payment Portal Thread Count	Used to specify the number of threads you want to spawn in parallel. This value is used when a batch job is automatically created for the **Create Payments from Payment Staging Records (PUPL)** batch. **Note:** By default, the value is set to **1**. You can change the value, if required.	No
Thread Pool Name	Used to specify the thread pool on which you want to execute the batch. This value is used when a batch job is automatically created for the following batches: • Upload Payment Records in Pre-Staging Area (C1-PYUP1) • Move Payment Records to Staging Area (C1-PYUP2) • Create Payments from Payment Staging Records (PUPL) **Note:** By default, the value is set to **DEFAULT**. You can change the value, if required.	No

7. Enter the values for the required option types in the **Feature Configuration** screen.
8. Click the **Save** button in the **Page Title** area.
   The changes made to the feature configuration are saved.

Setting the C1-CFS Feature Configuration

The **C1-CFS** feature configuration enables you to indicate whether the application environment should use the file object storage service of Oracle Cloud Infrastructure (OCI). If the file object storage service of OCI is used, you need to specify the buckets or containers within the Object Storage namespace from where you need to read files for the On Demand Billing and Payment Upload features. Before specifying the buckets to read files from the external location for the On Demand Billing and Payment Upload features, you need to define a file storage extendable lookup value using the **File Storage Configuration (F1-FileStorage)** extendable lookup where the file adapter is set to **Oracle Cloud Object Storage**. For more information on how to define a file storage extendable lookup value, refer to the **Oracle Utilities Application Framework Administrative Processes → Configuration Tools → Miscellaneous Topics → Referencing URIs → External File Storage** in *Oracle Revenue Management and Billing Online Help*.

Procedure

To set the **C1-CFS** feature configuration:

1. Login to Oracle Revenue Management and Billing Version 5.1.0.0.0.
2. Click the **Admin** link in the **Application** toolbar.
   A list appears.

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3. From the **Admin** menu, select **F** and then click **Feature Configuration**.
   A sub-menu appears.
4. Click the **Search** option from the **Feature Configuration** sub-menu.
   The **Feature Configuration Query** screen appears.
5. In the **Feature Configuration Search** zone, enter **C1-CFS** in the **Feature Name** field.

   Note: ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.
6. Click **Search**.
   A list of feature configurations that meet the search criteria appears in the search results.
7. In the **Search Results** section, click the link in the **Description** column corresponding to the feature configuration whose details you want to edit.

   The **Feature Configuration** screen appears. It contains the following option types:

Option Type	Description	Mandatory (Yes or No)
File Object Storage Usage	Used to indicate whether the application environment should use the file object storage service of Oracle Cloud Infrastructure (OCI). The valid values are: • Y • N **Note:** By default, the value is set to **N**. You must ensure that the value of this option type is set to **N** in the On Premise and Cloud Service environments. If the value of this option type is set to **Y**, you need to accordingly specify the directory paths while executing the **DWLDBILC**, **C1-PUPSG**, **C1-APACK**, and **C1-RECUP** batches. For more information, refer to the *Oracle Revenue Management and Billing Batch Guide*.	Yes
ODB Extendable Lookup and Bucket	Used to specify the following information in the `<File Storage Extendable Lookup Value>/<Object Storage Bucket>` format: • The file storage extendable lookup value from where the cloud storage compartment and connection details are retrieved while uploading the files through the On Demand Billing feature. • The bucket or container from where you want to upload the file using the On Demand Billing feature.	Yes (Conditional)

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Option Type	Description	Mandatory (Yes or No)
	Note: This option type is required only when the **File Object Storage Usage** option type is set to **Y** and you want to use the On Demand Billing feature.	
Payment Upld Extendable Lookup and Bucket	Used to specify the following information in the `<File Storage Extendable Lookup Value>/<Object Storage Bucket>` format: • The file storage extendable lookup value from where the cloud storage compartment and connection details are retrieved while uploading the files through the Payment Upload feature. • The bucket or container from where you want to upload the file using the Payment Upload feature.	Yes (Conditional)
	Note: This option type is required only when the **File Object Storage Usage** option type is set to **Y** and you want to use the **Payment Upload** feature.	

8. Set the **File Object Storage Usage** option type to **N**.
9. Click the **Save** button in the **Page Title** area.
   The changes made to the feature configuration are saved.

Setting the C1-FLUPLD Feature Configuration

You need to set the **C1-FLUPLD** feature configuration only when you want to decrypt the encrypted files on the SFTP server while uploading and transforming the files through the **C1-FTRAN** batch. The **C1-FRDALG** algorithm is used to decrypt the file using the keystore. Earlier, the following properties were derived from the `FW_spl.properties.keystore.truststore.include` file to encrypt or decrypt the files using the keystore:

- `com.oracle.ouaf.system.keystore.file`
- `com.oracle.ouaf.system.keystore.passwordFileName`
- `com.oracle.ouaf.system.keystore.type`
- `com.oracle.ouaf.system.keystore.padding`
- `com.oracle.ouaf.system.keystore.mode`
- `com.oracle.ouaf.system.keystore.alias`
- `ouaf.system.fileupload.pgp.pvt.key.filepath`

Now, the **C1-FLUPLD** feature configuration enables you to specify the required details to encrypt or decrypt the files using the keystore.

Procedure

To set the **C1-FLUPLD** feature configuration:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **F** and then click **Feature Configuration**.
   A sub-menu appears.
3. Click the **Search** option from the **Feature Configuration** sub-menu.
   The **Feature Configuration Query** screen appears.
4. In the **Feature Configuration Search** zone, enter **C1-FLUPLD** in the **Feature Name** field.

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Note: ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.

5. Click **Search**.
   A list of feature configurations that meet the search criteria appears in the search results.
6. In the **Search Results** section, click the link in the **Description** column corresponding to the feature configuration whose details you want to edit.

   The **Feature Configuration** screen appears. It contains the following option types:

Option Type	Description	Mandatory (Yes or No)
File Decryption Key Alias	Used to specify the alias (i.e. key defined in the keystore) using which you want to encrypt or decrypt the files. **Note:** By default, the value is set to **ouaf.system**. You can change the value as per the requirement.	Yes
File Decryption PGP Private Key File Path	Used to specify the directory or bucket from where you want to fetch the private key file for decrypting Pretty Good Privacy (PGP) files. If the application environment is an On Premise or Cloud Service environment, you can specify the directory name along with the following relative path: • **@SHARED_DIR** – Used when you want to fetch the private key file (for decrypting PGP files) from the shared directory on the server. However, if the application environment is a Cloud Service Premium Edition environment, you must specify the following information in the `file-storage://<File Storage Extendable Lookup Value>/<Object Storage Bucket>` format: • The file storage extendable lookup value from where the cloud storage compartment and connection details are retrieved while fetching the private key file (for decrypting PGP files) on OCI. • The bucket or container from where you want the system to fetch the private key file for decrypting PGP files. **Note:** By default, the value is set to **@SHARED_DIR/PGP_KEYS/PGP_PRIVATE_KEY.asc**. You must change the value as per the requirement. The shared directory variable (i.e. **SHARED_DIR**) is case-sensitive.	Yes

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Option Type	Description	Mandatory (Yes or No)
File Decryption PGP Public Key Alias	Used to specify the alias (i.e. key in the public key file) using which you want to encrypt or decrypt the PGP files. **Note:** By default, the value is set to **ouaf.system.fileupload.publickey**. You can change the value as per the requirement.	Yes
File Decryption PGP Public Key File Path	Used to specify the directory or bucket from where you want to fetch the public key file for decrypting Pretty Good Privacy (PGP) files. If the application environment is an **On Premise** or **Cloud Service Environment**, you can specify the directory name along with the following relative path: • **@SHARED_DIR** – Used when you want to fetch the public key file (for decrypting PGP files) from the shared directory on the server. However, if the application environment is a Cloud Service Premium Edition environment, you must specify the following information in the `file-storage://<File Storage Extendable Lookup Value>/<Object Storage Bucket>` format: • The file storage extendable lookup value from where the cloud storage compartment and connection details are retrieved while fetching the public key file (for decrypting PGP files) on OCI. • The bucket or container from where you want the system to fetch the public key file for decrypting PGP files. **Note:** By default, the value is set to **@SHARED_DIR/PGP_KEYS/PUBLIC_KEY.asc**. You must change the value as per the requirement. The shared directory variable (i.e. **SHARED_DIR**) is case-sensitive.	Yes
Key Store File Path	Used to specify the directory or bucket from where you want to fetch the keystore file. If the application environment is an On Premise or Cloud Service environment, you can specify the directory name along with the following relative path: • **@SHARED_DIR** - Used when you want to fetch the keystore file from the shared directory on the server. For example, you can set the value to `@SHARED_DIR/.ouaf_keystore`. However, if the application environment is a Cloud Service Premium Edition environment, you must specify	Yes

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Option Type	Description	Mandatory (Yes or No)
	the following information in the `file-storage://<File Storage Extendable Lookup Value>/<Object Storage Bucket>` format: • The file storage extendable lookup value from where the cloud storage compartment and connection details are retrieved while fetching the keystore file on OCI. • The bucket or container from where you want the system to fetch the keystore file. **Note:** By default, the value is set to **@SHARED_DIR/ks/.ouaf_keystore**. You must change the value as per the requirement. The shared directory variable (i.e. **SHARED_DIR**) is case-sensitive.	
Key Store Mode	Used to specify the mode using which you want to encrypt or decrypt the files. **Note:** By default, the value is set to **CBC** (i.e. Cipher-block Chaining).	Yes
Key Store Padding	Used to specify the padding using which you want to encrypt or decrypt the files. **Note:** By default, the value is set to **PKCS5Padding**.	Yes
Key Store Password File Path	Used to specify the directory or bucket from where you want to fetch the keystore password file. If the application environment is an On Premise or Cloud Service environment, you can specify the directory name along with the following relative path: • **@SHARED_DIR** - Used when you want to fetch the keystore password file from the shared directory on the server. For example, you can set the value to `@SHARED_DIR/.ouaf_storepass`. However, if the application environment is a Cloud Service Premium Edition environment, you must specify the following information in the `file-storage://<File Storage Extendable Lookup Value>/<Object Storage Bucket>` format: • The file storage extendable lookup value from where the cloud storage compartment and connection details are retrieved while fetching the keystore password file on OCI. • • The bucket or container from where you want the system to fetch the keystore password file.	Yes

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Option Type	Description	Mandatory (Yes or No)
	Note: By default, the value is set to **@SHARED_DIR/ks/.ouaf_storepass**. You must change the value as per the requirement. The shared directory variable (i.e. **SHARED_DIR**) is case-sensitive.	
Key Store Type	Used to indicate the type of keystore file. **Note:** By default, the value is set to **JCEKS**.	Yes
Private Key File Path	Used to specify the directory or bucket from where you want to fetch the private key file. If the application environment is an On Premise or Cloud Service environment, you can specify the directory name along with the following relative path: • **@SHARED_DIR** - Used when you want to fetch the private key file from the shared directory on the server. For example, you can set the value to `@SHARED_DIR/.ouaf_storepass`. However, if the application environment is a Cloud Service Premium Edition environment, you must specify the following information in the `file-storage://<File Storage Extendable Lookup Value>/<Object Storage Bucket>` format: • The file storage extendable lookup value from where the cloud storage compartment and connection details are retrieved while fetching the private key file on OCI. • The bucket or container from where you want the system to fetch the private key file. **Note:** By default, the value is set to **@SHARED_DIR/ks/.ouaf_storepass**. You must change the value as per the requirement. The shared directory variable (i.e. **SHARED_DIR**) is case-sensitive.	Yes

7. Enter the values for the required option types in the **Feature Configuration** screen.
8. Click the **Save** button in the **Page Title** area.
   The changes made to the feature configuration are saved.

Setting the C1-REPORTVW Feature Configuration

You need to set the **C1-REPORTVW** feature configuration only when you are using the Apache FOP Reporting framework in ORMB. It enables you to define the following properties which were earlier derived from the `spl.properties` file:

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- `ouaf.runtime.billView.directoryPath`
- `ouaf.runtime.reportView.directoryPath`
- `ouaf.application.reportingDir`

Procedure

To set the **C1-REPORTVW** feature configuration:

1. Login to Oracle Revenue Management and Billing Version 5.1.0.0.0.
2. Click the **Admin** link in the **Application** toolbar.
   A list appears.
3. From the **Admin** menu, select **F** and then click **Feature Configuration**.
   A sub-menu appears.
4. Click the **Search** option from the **Feature Configuration** sub-menu.
   The **Feature Configuration Query** screen appears.
5. In the **Feature Configuration Search** zone, enter **C1-REPORTVW** in the **Feature Name** field.

   Note: ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.
6. Click **Search**.
   A list of feature configurations that meet the search criteria appears in the search results.
7. In the **Search Results** section, click the link in the **Description** column corresponding to the feature configuration whose details you want to edit.

   The **Feature Configuration** screen appears. It contains the following option types:

Option Type	Description	Mandatory (Yes or No)
Report Download HTTP URL	Used to specify the HTTP servlet using which you want to download and view the FOP reports that are generated in the online mode. You must specify the URL in the following format: `https://ipaddress:port/ouaf/reportView` **Note:** You must override the default value as per the requirement.	Yes
Report Generation (FOP) File Path	Used to specify the directory or bucket where you want to store the FOP reports which are generated either from the user interface or through a batch process. If the application environment is an On Premise or Cloud Service environment, you can specify the directory name along with the following relative path: • **@SHARED_DIR** - Used when you want to store the FOP reports in the shared directory on the server. For example, you can set the value to `@SHARED_DIR/output`. However, if the application environment is a Cloud Service Premium Edition environment, you must specify the following information in the `file-storage://`	Yes

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Option Type	Description	Mandatory (Yes or No)
	`<File Storage Extendable Lookup Value>/<Object Storage Bucket>` format: • The file storage extendable lookup value from where the cloud storage compartment and connection details are retrieved while storing the FOP reports on OCI. • The bucket or container where you want the system to store the FOP reports which are generated in the different formats. **Note:** By default, the value is set to **@SHARED_DIR/splapp/reporting/output**. You must change the value as per the requirement. The shared directory variable (i.e. **SHARED_DIR**) is case-sensitive.	
Report Generation XSL Template File Path	Used to specify the directory or bucket from where the respective XSL file should be fetched while generating the FOP report. If the application environment is an On Premise or Cloud Service environment, you can specify the directory name along with the following relative path: • **@SHARED_DIR** - Used when you want to fetch the XSL file from the shared directory on the server. For example, you can set the value to `@SHARED_DIR/xsl`. However, if the application environment is a Cloud Service Premium Edition environment, you must specify the following information in the `file-storage://<File Storage Extendable Lookup Value>/<Object Storage Bucket>` format: • The file storage extendable lookup value from where the cloud storage compartment and connection details are retrieved while fetching the XSL file for an FOP report. • The bucket or container from where you want the system to fetch the XSL file while generating the FOP report.	Yes

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Option Type	Description	Mandatory (Yes or No)
	Note: By default, the value is set to **@SHARED_DIR/splapp/reporting/xsl**. You must change the value as per the requirement. The shared directory variable (i.e. **SHARED_DIR**) is case-sensitive. Before generating an FOP report, you need to ensure that the XSL files are copied from the **@INSTALL_DIR/splapp/reporting/xsl** directory to the specified shared directory.	
Report Generation XML Data File Path	Used to specify the directory or bucket where you want to extract the data from the system in the XML format for an FOP report. If the application environment is an On Premise or Cloud Service environment, you can specify the directory name along with the following relative path: • **@SHARED_DIR** - Used when you want to store the XML file in the shared directory on the server. For example, you can set the value to `@SHARED_DIR/extractxml`. However, if the application environment is a Cloud Service Premium Edition environment, you must specify the following information in the `file-storage://<File Storage Extendable Lookup Value>/<Object Storage Bucket>` format: • The file storage extendable lookup value from where the cloud storage compartment and connection details are retrieved while storing the XML file on OCI. • The bucket or container where you want the system to store the XML file for an FOP report. **Note:** By default, the value is set to **@SHARED_DIR/splapp/reporting/extractxml**. You must change the value as per the requirement. The shared directory variable (i.e. **SHARED_DIR**) is case-sensitive.	Yes

8. Enter the values for the required option types in the **Feature Configuration** screen.
9. Click the **Save** button in the **Page Title** area.
   The changes made to the feature configuration are saved.

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Setting the SYSDT Feature Configuration

The **SYSDT** feature configuration enables you to set certain environment options which will be used across features in the application.

Procedure

To set the **SYSDT** feature configuration:

1. Click the **Admin** link in the **Application** toolbar.
   A list appears.
2. From the **Admin** menu, select **F** and then click **Feature Configuration**.
   A sub-menu appears.
3. Click the **Search** option from the **Feature Configuration** sub-menu.
   The **Feature Configuration Query** screen appears.
4. In the **Feature Configuration Search** zone, enter **SYSDT** in the **Feature Name** field.

   Note: ORMB search engine supports wildcard search, where you can substitute the percentage (%) symbol as a stand in for any word or letter in a search criteria. You can use the '%' wildcard character in all input fields except the date and ID fields. The '%' wildcard character is suffixed automatically at the end of the partial search criteria. Therefore, you may or may not specify the wildcard character at the end of the partial search criteria. However, you have to prefix the wildcard character manually wherever required.
5. Click **Search**.
   A list of feature configurations that meet the search criteria appears in the search results.
6. In the **Search Results** section, click the link in the **Description** column corresponding to the feature configuration whose details you want to edit.

   The **Feature Configuration** screen appears. It contains the following option types:

Option Type	Description	Mandatory (Yes or No)
Environment Type	Used to indicate whether the environment will be used for the financial services or health insurance domain. The valid values are: • **B** - Used when you want to use the environment for the financial services domain. • **H** - Used when you want to use the environment for the health insurance domain.	Yes
Maximum Attachment Size	Used to specify the maximum size limit for a file that can be uploaded in the system. The size is interpreted in megabytes (MB). For example, if you want to set the maximum size limit of a file to 5 MB, then specify the value as 5 in this option type. **Note:** You must specify a value greater than zero. If you do not specify any value for this option type, the system would not enforce any limit while uploading a file in the system.	No
System Override Date	Used when you want to override the system date. The system will then use the specified date as the system date instead of retrieving the system date from the database.	No

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Option Type	Description	Mandatory (Yes or No)
	Note: You must specify the date in the YYYY-MM-DD format. This option type is valid only when an appropriate system property is set. It provides a way to override the system date for online operations of all the users in the region. See the online help (search for 'System Override Date') for more information about the system property and how to override the system date at the user level rather than at the system level.	

7. Enter the values for the required option types in the **Feature Configuration** screen.
8. Click the **Save** button in the **Page Title** area.
   The changes made to the feature configuration are saved.